



THE MARKET SYSTEM DEVELOPMENT FOR HONEY AND FODDER VALUE CHAIN IN SOMALILAND

July 2011

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1.0 INTRODUCTION

Practical Action Consulting has been working with ILO's project partners to implement a baseline and market survey for the honey and fodder markets in Somaliland and is now supporting partners during the design and implementation of the VC activities. This includes undertaking a detailed market analysis, as well as building capacities for market systems development and for natural resource management planning.

The objective of this assignment is to support ILO's SEED project in regard to value chain upgrading of the honey and fodder markets in Somaliland over a 4 month analysis and innovation period. The key output of this phase is a market analysis and innovation to inform future ILO programme activities. The key expected result of SEED is that the implementation partners will adopt evidence based conflict sensitive approaches in market development.

This report provides a summary of what was done during the period in achieving the planned outputs. During the period, PAC has implemented the following activities leading to the market analysis and informing the future ILO programme activities. The activities include:

- (i) implementing a training of trainers (TOT) in (conflict sensitive) value chain and participatory market systems development for partners;
- (ii) supporting partners to establish market based forums in fodder and honey sector and undertake market mapping;
- (iii) Supporting partners to train forums in market development concepts and approaches plus develop market maps (and embedded conflict maps) and action plans;
- (iv) Collecting baseline and on going monitoring information (household and enterprise level); and finally,
- (v) Supporting partners to prepare a clear strategy and plan for subsequent upgrading activities.

2.0 KEY OUTPUTS

2.1 Preparation of training materials

Training materials were prepared for the TOT programme to assist partners to better engage with market actors and establish market forums. PAC utilised the operational guide to local value chain development prepared by ILO and developed a modular training programme integrating this with PAC PMSD materials. These modules have been used to train the ILO partners in conflict sensitive approaches and methodologies for participatory market systems development. This TOT programme is designed to assist the partners to

better engage with market actors and to establish market forums. Before preparation of the training materials, selection of sub-sector actors was undertaken by local partners in collaboration with PAC to participate in the value chain activities.

2.2 TOT training in VCD and PMSD

The VC TOT Training course developed and implemented with 23 participants drawn from partner organizations of PENHA and Amoud University as well as: (i) Local Chamber of Commerce; (ii) Institute of Peace and Conflict Studies ; and (iii) University of Hargeisa. The training was held from 5th-7th April 2011 at Ambassador Hotel, Hargeisa, Somaliland, with participants drawn from 7 institutions. The modular workshop was organized in seven core modules designed to build incremental knowledge and skills for the participants.

- Module 1 – Markets Overview
- Module 2 – Sub-sector selection
- Module 3 – Market mapping
- Module 4 – What is PMSD?
- Module 5 – Facilitation skills
- Module 6 – Project Design
- Module 7 – Complementary tools

During the workshop, the participants demonstrated their understanding and ability to apply Practical Action's facilitative and participatory approach to implementation in which market actors: -

- Map their market and identify blockages and opportunities
- Create a vision of their market
- Develop an action plan to achieve their vision and decide what actions they want to take forward
- Are supported directly in the actions the project is mandated to carry out; enabled to take forward actions they can do themselves and directed to other sources of support for the rest
- Monitor and evaluate progress on their action plan

This training was designed as a preparatory step to the implementation of the ILO-supported Fodder and Honey market value chains development. Consequently, participants agreed on the three Districts of Sool, Sanaag and Togdheer as the priority for the honey and fodder value chains. (*See appendices for detailed report summary*)

2.4 Preparatory Forums for Participatory Market Mapping (PMM) Workshops

One of the planned activities for the period was undertaking a participatory market mapping for the fodder and for honey value chain actors. The expected output from this process was (i) Create awareness, enhance understanding and trust; (ii) Help stakeholders get to know each other and to exchange; (iii) Help building a joint vision of the future and upgrading

strategy; (iv) Enhance business linkages; (v) Enhance new business transactions and investment; (vi) Facilitate joint learning of VC stakeholders and process innovation; and (vii) Capacity Development and Institution building for PENHA.

In preparation for the workshops, PAC and PENHA held preparatory workshops with fodder and honey producers in the identified locations. These workshops were designed to: -

- (i) Introduce and gain understanding and acceptance of the concept and process of the planned market approach by honey and fodder producers in the respective regions. Essentially, get buy-in and adoption of appropriate expectations of the market approach.
- (ii) Conduct an initial preliminary market mapping to enable the producers generate key issues/challenges/blockages as perceived by themselves and also suggest possible win-win solutions

The Workshops for Fodder and for Honey Producers were held in Burao, Elgavo and Las Anod in preparation for the PMM and attended by 77 honey actors, and 65 fodder actors as summarised in the table below:

	Honey	Fodder	Total
Burao	18	26	44
Elgavo	39	39	78
Las Anod	20	-	20
Total	77	65	

These were one-day Workshops for fodder and honey producers separately. The workshops were essentially a preparatory work to set the stage for the main Participatory Market Mapping (PMM) workshops. A one-day workshop was held with honey producers and another one-day workshop with fodder producers in each of the three regions of Togdheer, Sool and Sanaag. This is an essential and strategic stage setting for the planned participatory market mapping workshop for all actors in the honey and fodder market value chains.

During these meetings, that were held on May 22nd and 23rd May at Burao (one for honey producers and the other for fodder producers), the partner staff of PENHA sat and observe as Practical Action consultant conducted the workshops. The next workshops (held for 25th and 26th May at Erigavo and June in Sool), were held by the staff of PENHA with distant support from PA consultant.

These workshops were designed as a preparatory step to the implementation of the ILO-supported Fodder and Honey market value chains development. Consequently, the producers identified their local representatives to the planned Participatory Market Mapping (PMM) scheduled for the following month.



2.3 Establishment of Market Forums and Initial Participatory Market Mapping

During the period, PAC provided support to the partners to establish two market forums by facilitating awareness raising meetings among market actors. As a follow up of the forums, the partner PENHA brought together honey and fodder market actors drawn from the four regions of Togdheer, Sool, Odweyne and Sanaag to Borao location for scheduled Participatory Market Mapping two day workshops for each market chain. VC Steering Committees are being established to drive the implementation of upgrading strategies for honey and fodder sub-sectors.

The two forums brought together the producers and other value chain actors (including transporters, processors, retailers, brokers and local government officials), key service providers to the value chains (that included input suppliers, technology providers and trainers) plus relevant development actors and local policy makers to analyse the market's problems (opportunities and blockages) and undertake market mapping activities. PAC has also provided support to partners to begin training the forums and to develop preliminary market maps.

From these workshops, participants had the opportunity to: -

- i. Create awareness, enhance understanding and trust
- ii. Know each other and to exchange
- iii. Building a joint vision of the future and upgrading strategy
- iv. Start the process of developing business linkages
- v. Enhance new business transactions and investment
- vi. Facilitate joint learning of VC stakeholders and process innovation
- vii. Capacity Development and Institution building for PENHA

Through this workshop, which was held in coordination with NRM workshop and conflict mapping, PAC has also collected baseline information required by the project for monitoring and evaluation purposes during the participatory workshops. Information has been collected from a range of market actors and relate to enterprise level information such as productivity (yields), sales, income, turnover, business assets, employees etc. Additional household demographic information has also been collected from producers and will include data relating to education and household expenditure, assets plus characteristics. This will boost the information collected during the market assessment

From the workshops and interactions, market actors had an opportunity to dialogue, establish links, build trust and develop momentum to change the market. From these workshops, the consultants and the partners will develop strategies for intervention and that will guide the next phase of the project implementation (*see appendix xxx for detailed summary report*).

A detailed value chain map was developed for each subsector (honey and fodder). This was done using participatory approach in a series of joint workshops with the main stakeholders in each subsector. Based on the value chain maps, a detailed analysis of each subsector was then conducted to identify the constraints hindering the growth of each subsector and the opportunities.

2.5 Collecting baseline and on-going monitoring information

PAC and local partners collected baseline information required by the project for monitoring and evaluation purposes during the participatory workshops. Information has been collected from a range of market actors and relate to enterprise level information such as productivity (yields), sales, income, turnover, business assets, employees etc. Additional household demographic information has also been collected from producers and will include data relating to education and household expenditure, assets plus characteristics. This will boost the information collected during the market assessment

2.6 Preparation of strategy for implementation

After the value chain mapping and analysis phase, PAC again worked with industry stakeholders to identify a common vision for each subsector, to set goals and develop intervention strategies to reach these goals. Based on the agreed intervention strategies, activities were planned and implemented with the various industry stakeholders. These activities range from improving the production process; ensuring product quality through development of industry codes of conduct and labelling; the development of new markets/products; facilitation of vertical and horizontal business linkages; strengthening the provision of business development services; institutional capacity building; and easing of policy level constraints. Strategic linkages with other donors and supporting institutions working in the various subsectors were actively pursued during this phase. A detailed strategy of implementation is addressed in section 3.0 below.

3.0 APPROACH STRATEGY AND INTERVENTION FOR HONEY AND FODDER SUB-SECTOR

3.1 Overview of the value chain

In designing the strategy for intervention in Somaliland, Value chain approach was used. A value chain can be defined as a sequence of productive processes from the provision of specific inputs for a particular product to primary production, transformation, marketing and distribution and final consumption. According to Kaplinski and Morris (2003) 'value chain describes the full range of activities which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers and final disposal after use'. Value chain systematically takes all steps of a production process into account. It analyses the links and information flows within the chain and reveals the strengths and weaknesses (and even losses) in the process. It also analyses the boundaries between the national and the international chains, takes into account buyer's requirements, international standards and allows international (Richter, 2005). The value chain approach addresses the so-called critical success factors that determine if a product meets market requirements.

PAC takes note that increased production of honey and fodder alone will not help rural producers if they cannot sell their products and if there is little value added at their end of the value chain. It is equally important to link rural producers with markets and sustain and grow these links so that they form a perpetual growth cycle of production and consumption. Connecting rural producers with markets on a sustainable basis is a very challenging task. Value chain promotion helps to build sustained links between rural producers and urban markets.

3.2 Mapping and Analysis of Value Chain of honey and fodder

After the selection of the subsectors, a detailed value chain map is developed using participatory approach in a series of joint workshops with the main stakeholders. While mapping the chain a detailed analysis is conducted to identify the constraints hindering the growth of the subsector and the opportunities. The key issue during the analysis stage is to find the most pressing bottlenecks first and address them in a systemic manner. These bottlenecks can be either issues related to functions, actors, linkages among them or even external factors such as policy and infrastructure.

3.2.1 Value Chain Map for honey subsector

Trade of honeybee products is a complex and dynamic process. It involves various linkages among the beekeepers, hive carpentry workshops, bee breeders, equipment suppliers, honey processors and traders. The core problem for this sector is the lack of effective value chain linkages among input providers, beekeepers, processors, traders and service providers. The honey value chain in Somaliland (see figure) is very short, with honey produced being supplied directly to local consumers mainly individuals who buy directly from the producers, or honey is sold to retailers and herbal stores where it is mixed with

medicine. Most of the honey produced is distributed straight from the beekeepers/honey hunters to the consumer. Honey is generally sold individually by beekeepers to small shops and private customers. Limited processing takes place other than heating, sieving and packaging in used bottles. The input suppliers constitute the initial node of the value chain and they comprise organizations and or individual entrepreneurs involved in the construction of beekeeping gear for sale to interested producers. The inputs in the honey production is mainly the production equipment (beehives, smokers, bee suits etc), processors (knives, sieves, buckets), and as seen, very basic. Traditionally, beekeepers work as integrated actor and perform 2 or more functions of value chain. They make their hives out of available local materials, catch and hive swarms, manage bees, harvest and process honey, package and sell to the consumers. The market survey/baseline conducted in Somaliland by PAC revealed that most of the consumers prefer loose pack unbranded honey from the producers they know personally.

The flow of honey and other bee products in the market and distribution of income from consumers to beekeepers/input suppliers is depicted in the value chain map below. This map consists of three elements: functions, operators and supporters. The enterprises performing the basic functions of a value chain are operators. At one stage in the value chain, they become owners of the (raw, semi-processed or finished) product. Thus, there is a difference between operators and “value chain supporters/enablers”, the latter provide support services and represent the common interests of the VC operators. They remain outsiders to the regular business process and restrict themselves to temporarily facilitating a chain upgrading strategy.

Typical facilitation tasks include creating awareness, facilitating joint strategy building and action and the coordination of support activities.

3.2.2 Value Chain Map for fodder subsector

In this section we describe the fodder production and market value chain and indicated the fodder products and services as they flow from production to consumption through the various chain actors. The actors’ performance at each level is not to full potential due to the weak value chain as a result of underdevelopment in each level of the chain. The market is supported by actors who supply regularly the buyers. The system provides high earning returns to producers as well as other chain actors due to the importance of the fodder in livestock development. The fodder market, as demonstrated, is a vibrant activity in the area. However, three are areas emerging from the fodder value chain that needs further interventions:

Feed is one scarce resource in most parts of Somaliland and Somalia in general and whenever it is adequate in some locations where feed is occasionally adequate in quantity it is almost always deficient in quality, mainly low levels of protein and energy. This situation seriously limits livestock growth and production. In the drier pastoral areas, the quality and amount (quantity) of forage available is almost always insufficient for the number of animals attempting to feed off it. In the mixed farming areas along dry river beds and flood plains,

natural pastures are being taken over for subsistence cropping and production of fodder. In the mixed production systems, crop residues and by-products are important in the livestock diet but are usually low in nutrients and often wasted or used inefficiently due to inadequate knowledge and the capacity to process and conserve them as livestock feed.

Most of the farms do not use much input to improve production. The inputs used include animal manure, seeds, fuel for water pumping etc. Agro-pastoralists acquire these inputs mostly on their own. Interviews with farmers reveal that they acquire the seeds, especially buying from stockists and sharing self-generated seed from previous crops. Some local NGOs like candlelight have been involved in the support in the acquisition of farm implements. The interest in fodder production is now growing to the extent that the farmers have started multiplying their own seed for use the subsequent planting seasons. The agro-pastoralists do not use commercial fertilizers but rely on manure collected from the animals' overnight sheds. Some farmers have been trained on how to prepare compost manure but this was not common across the region. They acknowledge that the soil is alkaline and would rather use manure than industrial fertilizer

3.3 Proposed interventions and implementation strategies

Based on the agreed intervention strategies by participants, the following activities are proposed for implementation if honey and fodder are to contribute to employment creation and alleviation of poverty. These activities range from improving the production process; ensuring product quality through development of industry codes of conduct and labelling; the development of new markets/products; facilitation of vertical and horizontal business linkages; strengthening the provision of business development services; institutional capacity building; and easing of policy level constraints. Strategic linkages with other donors and supporting institutions working in the various subsectors should be actively pursued during this phase. The following strategy is proposed defining how to respond to the market impediments for honey and fodder and action to improve how the market functions in a sustainable way. The areas of intervention, objectives and indicators are summarised in table below.

3.3.1 Proposed strategy for value chain promotion of honey in Somaliland

Area of Intervention	Objective	Specific interventions/Proposed activities	Indicators	Risks
Domestic Market Promotion	To increase local consumption/ uptake of honey and other bee/honey products through raising awareness and training.	Organisation of the Somaliland honey trade air and exhibition events for the familiarisation with Somali honey	80% of honey related enterprises attend the trade fair/exhibition and are able to exhibit products - An increase in per capita consumption of honey by 10% by 2015 - An increase in total sale of honey from	- Buyer producer relationships don't result in trade transactions - Weak economy

Institutional development of honey value chain actors	To empower and enable regional level honey related institutional and actors to develop and implement strategies for honey sector at local levels to lobby for policy issues with government, provide services to beekeepers in relation to information and knowledge about new and improved beekeeping technologies and to help in marketing and promotion of honey	- Facilitate the re-organization of producers, brokers, traders, cooperatives, processors, transporters, service providers, and exporters to form different groups and associations as a vehicle for increasing their competitiveness. - Train organized groups on group dynamics, marketing, micro-enterprise development, savings, credits, resource mobilization and governance based on gaps identified through capacity assessments. - Facilitate establishment of a business service centre to provide advice, business opportunities, exposure and linkages between players in the market chain. Focus should be on expansion and strengthening of existing micro-enterprises and service industries (transporters, financial service providers, Trainers and quality control providers) that serve the beekeeping and honey chains.	the baseline figures. - Active participation of regional level associations/cooperative in the development of the sector - Organisation of at least one activity by these institutions in the selected areas of interventions. - At least 30 groups trained 5 business services centres established in the Somaliland regions	Weak institutions, especially manpower
Access to equipment	To promote access to high quality equipment for production, harvesting and processing of honey	- Providing training on the designing, fabrication and making of beekeeping equipment for production, harvesting and processing honey. - Design and implement credit/financial capital scheme to enable the artisans to invest in their workshops, buy purchasing tools, materials. - Assist to commercialise and market honey production and processing equipment. - Help bee keepers acquire efficient	50 artisans trained to make good quality equipment for sale to beekeepers at affordable prices. - Increased uptake of locally produced quality honey equipment - Increased sales of locally fabricated equipment	Increasing prices of raw materials may undermine quality/and affordable equipment

Production and quality issues	To improve production of quality honey while taking into consideration value addition through specialised processing and packaging	equipment for production and processing of honey. • Training in improved quality production, and harvesting techniques. • Establish and equip bulk buying centres for honey where specialised honey companies can be able to collect honey in large volumes at specific centres • Creating the facility for processing, grading and packaging. • to identify investors that would be interested in these ventures where honey cooperatives or other bulking agencies can take their honey for processing and packaging • Work with local factories to manufacture bottles or containers to be used for packaging instead of importing the same.	• Train at least 60% of actors in the value chain • 5 bulky buying centres established and functional • 60% of producers marketing their honey through bulky buying centres	• Risk of non-ownership by producers in setting up and running collection and bulking centres • Absence of accurate industry data, especially on production volumes, output levels, and market data.
Capacity development for local actors	To raise awareness and build capacity of honey producers and traders so that they will be able to produce quality honey and fetch good prices in the market	• Design capacity building programmes aimed at addressing the training needs raised on beekeeping skills, honey production, honey processing and packaging, sales and marketing (including access to market information). • Designing and implementing the extension programme that will support all actors at value chain. • Facilitate players in the chain to acquire processing, quality control, marketing and business management skills. Exposure and experience sharing is a critical component of this function given the high level of illiteracy • support the existing associations and cooperatives to promote production, marketing and processing of honey	• At least 50% of local honey processed and can be found stocked in major local stores • 25% of the beekeepers receiving extension services • An increase of 15% in the number of honey producers and traders producing quality honey and fetching good prices	• Selection of actors willing to be trained • Enthusiasm in the implementation of the extension programme

		strengthening Cooperatives to offer more services to members and improve their operations		
Business development and financing	Provision of Financial services to actors in the honey value chain	- Market the honey sector to existing financial providers e.g. dahabshil, to make this sector attractive for financing. - Business develop and mentoring businesses in honey sub-sector	Financial providers start lending to the honey sub-sector	- Long distances to the market resulting in uneconomic benefits - Poor road and communication infrastructure.
Policy and advocacy	To identify and advocate for conducive policies for honey sub-sector thereby improving the enabling environment.	- Facilitate the development of honey policy and the legal and regulatory framework - Development of certification and quality standards	Government considers the policy guidelines and implements friendly policies	Weak government ministries in terms of quality and number of staff.

3.3.2 Proposed strategy for fodder value chain development

Intervention area	Objectives	Activities	Indicators	Risks
Farm inputs and implements	To improve access to farm inputs and implements to promote production of fodder	- Working with local stockists, hardware and agro-vet stores to ensure there is adequate supplies of quality fodder seeds, fertilisers and farm implements. - Support farmers through credit systems to access these inputs. - Support groups to harvest and produce seeds of selected perennial grasses to rehabilitate range.	Increased number of stockists dealing with farm inputs and implements Farmers able to access inputs locally	The importation of some of the farm inputs are is controlled/prohibited through an embargo in Somalia
Production	To increase the production of fodder to meet the needs of the market.	- Facilitate farmers to increase the area under fodder production. This would be through stabilizing rivers and irrigation canals with grasses, while creating awareness on the need to improve range and water harvest. - Irrigate the land for food and fodder production through better provision or support of irrigation equipment and services through cost sharing with affordable cost recovery	Increased area/acreage of fodder production from the current baseline Increased area under irrigation for fodder production	Current challenges in land tenure system Conflicts between agro pastoralism and pastoralism

Fodder value addition	To Improve Fodder storage and preservation	programs. Training of farmers to improve fodder value through building skills in the following areas • Harvesting (introduce better tools), storage (baling), and conservation (silage fodder with added feed additives including molasses and nitrogen sources). • Training on the fortification of maize Stover with molasses (energy source) and ammonium (nitrogen source). These adds value to the residue crops. • Training of farmers/pastoralists in preparation of silage and in appropriate range rehabilitation techniques.	Increased number of farmers trained on value addition and are practising the skills A range of fodder products on the market that have gone through the value addition process	Livestock producers/pastoralists /dealers embrace value added products
Capacity building	Strengthening the actors in the value chain	• Formation of producers, brokers, traders, exporters and service providers associations to improve service provision, efficiency, competition and resources mobilization in the fodder chain. This would encourage wider participation of players in the entire chain. • Training players in the chain to acquire production, harvesting, storage, processing, quality control, preservation, and business management skills for fodder products through exposure and experience sharing. • Commercialization of fodder production, storage and distribution.	At least 5 associations formed in Somaliland Ability of the organisations/association to function in the value chain	Sustainability of the associations Enthusiasm of the stakeholders to form these association
Environmental Management	To improve rangeland management, soil erosion control and water development rangelands.	• Environmental rehabilitation in the rangelands including, water harvesting for pasture rejuvenation. This includes channelling rivers to flat and fertile rangelands, ensuring pasture regeneration.	Improved rangeland conditions from the current baseline	Land ownership and tenure systems

Policy and advocacy issues	To improve the enabling environment for	The enabling environment for fodder production and marketing is weak. The relevant ministries such as agriculture, livestock, environment and pastoral development does not have a policy on fodder production and marketing. ILO and other actors would therefore consider supporting the development of an enabling environment and a policy for fodder by working with the relevant ministries.	One policy document developed and enacted by parliament	Political willingness to form and enact policy Challenges in the implementation of the policy
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4.0 CONCLUSIONS AND RECOMMENDATIONS

Despite the success of the programme implementation, a number of challenges were noted which would affect the delivery of the future activities. There is limited institutional capacity within the current partners and it may be necessary to invest more in capacity building as well as in expanding the number and range of partners involved. While the workshops brought in actors drawn from all key stages of the market chains, it was apparent that these participants represented largely the rural producers and actors and left out the larger players with a capacity for processing and export. The honey value chain is very small with very few people involved and with non-reporting it as a main income earner or source of livelihood. Local consumption of honey is equally small as it is largely used for medicinal purposes.

While there was a good turnout for the VC/TOT training and involvement during the workshop, there are lingering doubts about the participants, including PENHA's, full commitment to what PAC is doing in terms of understanding and willingness to change. While up to 10 of the participants reported coming from PENHA, we have serious doubts about the capacity of PENHA as an organization to implement a market systems approach. During the subsequent Participatory Marketing Mapping implementation, PENHA was short of programme staff to implement. Besides its Executive Director, only one of the trained staff was available during this critical stage.

Not all the course participants were fully engaging with all the training activities. We had a substantial number that merely made 'technical appearances' and then disappeared to their other engagements.

Security and weather conditions on the other hand prevented travel to 2 of 3 regions. PAC developed partner capacity instead.

The following recommendations are proposed

- PAC to take over all budget for market systems development and allocate to partners as required
- There is need for an opportunity to identify and engage with further partners in addition to current ones particularly those identified by forums
- Ensure appropriate future market selection is adhered to
- Closer planning with project partners
- Budget integration with partners
- Must maintain flexibility in project design to respond to market response
- Identify and capacitate associates
- Coordination of technical services provision (technical service providers need to be well coordinated)

5.0 APPENDICES

5.1 TOT training in Conflict Sensitive Value Chain Development

The VC TOT Training course developed and implemented with 23 participants drawn from partner organizations of PENHA and Amoud University as well as: (i) Local Chamber of Commerce; (ii) Institute of Peace and Conflict Studies ; and (iii) University of Hargeisa. The following is a brief report of the training:

Summary

Venue	Ambassador Hotel in Hargeisa
Dates	5 th – 7 th April 2011
Participants	23 Drawn from 7 Institutions
Service Provider	Practical Action
Partners	PENHA & Amoud University

Workshop Objectives

- Participants have an understanding of how markets work, why they don't work for the poor and how they can be used to reduce poverty
- Participants are aware of the importance of rigorous market system selection, understand different selection criteria and how to apply the selection process
- Participants understand the purpose of market mapping, know the 3 levels that make up the market, and can draw a basic market map
- Participants understand the framework, principles and tools of PMSD
- Participants are more confident and competent in using facilitation skills, enabling them to put the tools and principles of PMSD into practice
- Participants are able to identify and map causes of conflict and provide practical mitigation strategies.

Course Content Outline

The modular workshop was organized in seven core modules designed to build incremental knowledge and skills for the participants.

- Module 1 – Markets Overview
- Module 2 – Sub-sector selection
- Module 3 – Market mapping
- Module 4 – What is PMSD?
- Module 5 – Facilitation skills
- Module 6 – Project Design
- Module 7 – Complementary tools

Course Outcomes

23 participants drawn from the partner organizations of PENHA and Amoud University as well as (i) the Local Chamber of Commerce; (ii) Institute of Peace and Conflict Studies ; and (iii) University of

Hargeisa were trained in Practical Action's proven approaches to market facilitation combined with a market actor-led process that aims to: -

- BE SCALEABLE: Using and communicating business models that can be replicated elsewhere
- BE SUSTAINABLE: Build market capacity to sustain improvements over time without continued support

During the workshop, the participants demonstrated their understanding and ability to apply Practical Action's facilitative and participatory approach to implementation in which market actors: -

- Map their market and identify blockages and opportunities
- Create a vision of their market
- Develop an action plan to achieve their vision and decide what actions they want to take forward
- Are supported directly in the actions the project is mandated to carry out; enabled to take forward actions they can do themselves and directed to other sources of support for the rest
- Monitor and evaluate progress on their action plan

Challenges

- While there was a good turnout for the training and involvement during the workshop, there are lingering doubts about the participants, including PENHA's, full commitment to what Practical Action is doing in terms of understanding and willingness to change.
- While up to 10 of the participants reported coming from PENHA, we have serious doubts about the capacity of PENHA as an organization to implement a market systems approach. During the subsequent Participatory Marketing Mapping implementation, PENHA was short of programme staff to implement. Besides its Executive Director, only one staff was available during this critical stage.
- Not all the course participants were fully engaging with all the training activities. We had a substantial number that merely made 'technical appearances' and then disappeared to their other engagements.

Way Forward

This training was designed as a preparatory step to the implementation of the ILO-supported Fodder and Honey market value chains development. Consequently, participants agreed on the three Districts of Sool, Sanaag and Toogdheer as the priority for the honey and fodder value chains.

Attachments

- Participants initial market maps
- List of Participants
Participants engage in participatory market mapping



Participants Mapping the Honey Market Value Chain

The Fodder Market Map

The Honey Market Map

Participant List TOT/ VC Training (PMSD)

SER.NO.	NAME	ORGANISATION	POSITION	E-MAIL ADDRESS
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10	Fadumo M.Ali	PENHA	Admin/Finance	Fadumo-amran@live.com
11	Amsale Shibeshi	PENHA	Regional Project Coordinator	ashibeshi@hotmail.com
12	Prof. Abokor Sh.Abdi	AMOUD UNIVERSITY	Dean of Agriculture	
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14	Mohamed Ahmed Jimale	MOLPD&E	Head Section	m-xamdi@hotmail.com
15	Sadia Musse Ahmed	PENHA	Country Rep	sadiama@hotmail.com
16	Said Mohamed Dahir	AMOUD UNIVERSITY	Senior Trainer	siciidmd@gmail.com
17	Abdi Aziiz Yousuf Bakaal	PENHA	Logistics Officer	penhasom@gmail.com
18	Prof.Sulieman Ahmed	AMOUD UNIVERSITY	President	
19	Abdirazak M.warsame	ILO	Consultant	Busmanabdi09@gmail.com
20	Kamau Kabbucho	PAC	Facilitator	kabbucho@yahoo.co.uk
21	Lindsay Berresford	PAC	Facilitator	lindsayberresford@practicalaction.or.ke
22	Ilias Dirie	ILO	Technical Adviser	dirie@ilo.org
23	Abdirahman Ibrahim	Amoud University	Agronomist	Abdirahman019@hotmail.com
24	Mohamed Heban	Amoud University	Technician	Heban447@yahoo.com
25	Zainab Haibe	PENHA	Intern	zainablucky@hotmail.com

5.2 Preparatory Workshops for Fodder Honey Producers



These were one-day Workshops for fodder and honey producers separately. The workshops were essentially a **preparatory work** to **set the stage** for the main Participatory Market Mapping (PMM) workshops.

We held a one-day workshop with honey producers and another one-day workshops with fodder producers in each of the three regions of Togdheer, Sool and Sanaag. This is an essential and strategic stage setting for the planned participatory market mapping workshop for all actors in the honey and fodder market value chains.

During these meetings, that were held on May 22nd and 23rd May at Burao (one for honey producers and the other for fodder producers), the partner staff of PENHA sat and observe as

Practical Action consultant conducted the workshops. The next workshops (held for 25th and 26th May at Elgavo and June in Sool), were held by the staff of PENHA with distant support from PA consultant.

Summary

Venues	Honey	Fodder	Total
Burao	18	26	44
Elgavo	39	39	78
Las Anod	20	-	20
Total	77	65	

Workshop Objectives

The workshops were designed to:

- Introduce and gain understanding and acceptance of the concept and process of the planned market approach by honey and fodder producers in the respective regions. Essentially, get buy-in and adoption of appropriate expectations of the market approach.
- Conduct an initial preliminary market mapping to enable the producers generate key issues/challenges/blockages as perceived by themselves and also suggest possible win-win solutions
- Constitute regional-based market opportunity groups (MOGs) that select their representative to the planned market actors' forum Course Content Outline

Key Outcomes/outputs of the workshop

- Key market actors identified
- Introduction to market systems concepts
- Market-based forums promoted
- A wide variety of market system actors facilitated to jointly assess blockages and opportunities and decide required market system change
- Preliminary honey market maps developed
- Honey Market Opportunity groups formed in each region
- Selection of representatives to the PMM
- dialogue facilitated amongst wide variety of market actors and policy-makers

Challenges

- Bad weather and insecurity prevented the PA consultant from participating on-ground in Elgavo and in Las Anod. The support needed was however provided by email and through a local partner identified and trained during these assignments
- While PENHA field staff participated in the training with the PA consultant, they were engaged in a lot of logistical and administrative chores and failed to fully participate in the training. As such, they were inadequately prepared to carry out the work in their respective Districts trained during the TOT/VC training were unavailable leaving PENHA with virtually no institutional capacity for market systems development.

These workshops were designed as a preparatory step to the implementation of the ILO-supported Fodder and Honey market value chains development. Consequently, the producers identified their local representatives to the planned Participatory Market Mapping (PMM) planned for the following month.

[illegible]



5.3 PMM training in Conflict Sensitive Value Chain Development

During the period, PAC provided support to the partners to establish two market forums by facilitating awareness raising meetings among market actors. As a follow up of the forums, the partner PENHA brought together honey and fodder market actors drawn from the four regions of Togdheer, Sool, Odweine and Sanaag to Borao location for scheduled Participatory Market Mapping two day workshops for each market chain. VC Steering Committees are being established to drive the implementation of upgrading strategies for honey and fodder sub-sectors.

Summary

i.	Venue	Ambassador Hotel in Hargeisa
ii.	Dates	5 th – 7 th April 2011
iii.	Participants	23 Drawn from 7 Institutions
iv.	Service Provider	Practical Action
v.	Partners	PENHA & Amoud University

Workshop Outcomes

The two forums brought together the producers and other value chain actors (including transporters, processors, retailers, brokers and local government officials), key service providers to the value chains (that included input suppliers, technology providers and trainers) plus relevant development actors and local policy makers to analyse the market's problems (opportunities and blockages) and undertake market mapping activities. PAC has also provided support to partners to begin training the forums and to develop preliminary market maps.

From these workshops, participants had the opportunity to: -

- viii. Create awareness, enhance understanding and trust
- ix. Know each other and to exchange
- x. Building a joint vision of the future and upgrading strategy
- xi. Start the process of developing business linkages
- xii. Enhance new business transactions and investment
- xiii. Facilitate joint learning of VC stakeholders and process innovation
- xiv. Capacity Development and Institution building for PENHA

Through this workshop, which was held in coordination with NRM workshop and conflict mapping, PAC has also collected baseline information required by the project for monitoring and evaluation purposes during the participatory workshops. Information has been collected from a range of market actors and relate to enterprise level information such as productivity (yields), sales, income, turnover, business assets, employees etc. Additional household demographic information has also been collected from producers and will include data relating to education and household

expenditure, assets plus characteristics. This will boost the information collected during the market assessment

Challenges

- There is limited institutional capacity within the current partners and it may be necessary to invest more in capacity building as well as in expanding the number and range of partners involved.
- While the workshops brought in actors drawn from all key stages of the market chains, it was apparent that these participants represented largely the rural producers and actors and left out the larger players with a capacity for processing and export.
- The honey value chain is very small with very few people involved and with non-reporting it as a main income earner or source of livelihood. Local consumption of honey is equally small as it is largely used for medicinal purposes

Way Forward

From the workshops and interactions, market actors had an opportunity to dialogue, establish links, build trust and develop momentum to change the market. From these workshops, the consultants and the partners will develop strategies for intervention and that will guide the next phase of the project implementation

Attachments

- i. PMM Schedule
- ii. Participants initial market maps

Participatory Marketing Mapping Workshops

Session title	Time
Day 1	
1. introduction and levelling expectations a. Introduction of participants and facilitators b. Brief overview – PENHA & PA + w/shop overview c. Why Market Mapping	8.30am – 10.00 am
B R E A K	10 – 10.30
2. Market Mapping a. The Process steps from Producer to Consumer b. What Value is added at each step c. What Price is paid at each step d. What difficulties/constraints are experienced	10.30 – 1.00

e. What should be done – What are the suggested solutions?	
L U N C H	
3. Mapping the Services a. What are the core services b. What value does each add c. What prices are paid d. What difficulties/Constraints are experienced e. What should be done – What are the suggested solutions?	2.00 – 3.00
Day 2	
4. Mapping the Environment a. What is the environment within which the market operates b. What are the key issues/Constraints c. What should be done – what are the suggested solutions?	8.30 – 10.00
B R E A K	
5. Action Planning a. What are the issues? b. What should be done? By who? By when? c. What resources?	10.30 – 1.00 2.00 – 3.00

5.4 VC PREPARATORY MEETINGS: HONEY PRODUCERS MEETING - ATTENDANCE SHEET
BURCO – 31 MAY 2011

SER. NO.	NAME	DISTRICT	OCCUPATION	TELEPHONE NUMBER
1	Xamdi Hassan Mohammed	Burao	Honey Seller	4315121
2	Amina Sahal Cali	Burao	Honey Seller	4361270
3	Xamdi Xussein Ducale	Burao	Honey Seller	9307173
4	Warsame Siciid Mohamed	Burao	Honey Seller	4355662
5	Cali Cuge Mohamed	Burao	Honey Seller	4375755
6	Farax Cali Xasan	Beer	Honey Producer	-
7	Xussein Siciid Mohamed	Beer	Honey Producer	4347310
8	Xussein Ahmed Adan	Beer	Honey Producer	4076615
9	Xussein Cumar Muse	Beer	Honey Producer	4374347
10	Cabdi Qaasim Jamac	Beer	Honey Producer	4350777
11	Ahmed Aden	Burao	Extension Officer	4367503
12	Kamau Kabbucho	PA	Consultant/Trainer	4234647
13	Sadia Ahmed	PENHA	Project Team Leader	4427170
14	Abdirazak M.warsame	ILO	Consultant	4322605
15	Amsale Shibeshi	PENHA	Project Manager	4416203
16	Hassan Hirsi Farah	PENHA	VC Fodder	4324460
17	Ibrahim Madar	ADRA	Consultant/ Translator	4042225
18	Fadumo Mohamed Ali	PENHA	Finance Officer	4426579

5.6 PMM PREPARATORY MEETINGS: HONEY PRODUCERS MEETING - ATTENDANCE SHEET

Erigavo – 5th June 2011

S/no	Name	District	Occupation	Telephone
1	Saleban Warsame Hirsi	Erigavo	Producer	4037091
2	A/lahi Egeh Farah	Erigavo	Producer/Trader	4310900
3	Mohamed Yusuf Salah	Erigavo	Healer	-
4	Shire Mohamed Dirir	Erigavo	Produce	-
5	Basra Osman Hirsi	Erigavo	Producer	4170857
6	Rahma Jama Hirsi	Erigavo	Producer	4207195
7	Hodon Ahmed Ali	Erigavo	Producer	4024789
8	Hodon Mohamed Mohamud	Erigavo	Trader	4200778
9	Nura WArsame Hirsi	Erigavo	Producer	4218643
10	Omer Nur Abdi	Erigavo	Trader/Seller	4956166
11	Mohamed Ibrahim Ali	Erigavo	Trader/Seller	663019
12	Saleban Yasin Ali	Erigavo	Producer	4201045
13	Abdirahman Warsame Hirsi	Erigavo	Producer	4112057
14	Muse Gure Ismail	Erigavo	Producer	4212573
15	Ali Jama Abdi	Erigavo	Producer	4484460
16	Ahmed A/lahi Shramarke	Erigavo	Trader/Seller	4214588
17	Fosiya Ahmed Mohamed	Erigavo	Trader/Seller	779978
18	Ismail Mohamed Ibrahim	Erigavo	Producer	649292
19	Abdirahman Salah Osman	Erigavo	Trader/Seller	4204628
20	Saed Mohamed Osman	Erigavo	Trader/Seller	4207708
21	Ali Abdi Ahmed	Erigavo	Trader/Seller	789173
22	Mohamed Ismail Barre	Erigavo	Trader/Seller	777892
23	Jama Ali Daarood	Erigavo	Trader/Seller	4213377
24	Salah Mohamed Hirsi	Xidh-Xidh	Producer	4218153
25	Abdi Diiriye	Erigavo	Producer	
26	Saynab Abdikarim	Erigavo	VC Honey	4418362
27	Sadia Ahmed	PENHA	Project Team Leader	4427170
28	Ahmed Farah Jama	Erigavo	Producer	
29	Yusuf Cali Ciise	Maid	Transporter	4204120
30	Axmed Aw Cali Xiise	Erigavo	Producer	420321
31	Muse Axmed Cali	Erigavo	Producer	-
32	Fadumo Yusuf Ali	Erigavo	Transporter	242241
33	Cige muuse Xasan	Erigavo	Producer	776502
34	Mohamed Ahmed Ali	Erigavo	Transporter	-
35	Hawo Jama Cige	Erigavo	Producer	412020
36	Ali Ahmed Liiban	Erigavo	Transporter	42801
37	Rashid Yusuf Isamel	Erigavo	Producer	776520
38	Hassan Hirsi Farah	PENHA	VC Fodder	4324460
39	Ahmed Ali Hassan	PENHA	Extension Officer	4112026

5.7 PMM PREPARATORY MEETINGS - FODDER PRODUCERS MEETING - ATTENDANCE SHEET

BURCO – 31 MAY 2011

SER.NO.	NAME	DISTRICT	OCCUPATION	TELEPHONE NUMBER
1	Rahid Abdi Ali	Gatitaley	Producer	-
2	Xasan Mohamed Cilmi	Galloley	Producer	4483333
3	Asad Cabdilahe Xirsi	Galloley	Producer	4153364
4	Cabdi Mohamed Nour	Galloley	Producer	4615353
5	Xiis Cabdiahi Ibrahim	Qallocato	Seller	4615353
6	Cabdirahman Yusuf Nour	Gatitaley	Producer	-
7	Jama Ducalale Mahmud	Beer	Producer	4337536
8	Cabdilahe Axmed	Beer	Producer	4321092
9	Xasan Cali Cabdi	Beer	Producer	4331980
10	Jamac Farax Axmed	Gallocato	Producer	-
11	Cabdilahe J Cabdilahe	Qalacato	Producer	4031752
12	Cabdi Yusuf Cabdi	Qoyta	Producer	4346732
13	Salma Ciise Warsame	Qoyta	Producer	4378952
14	Mohamed Axmed Adan	Burao	Producer	4313992
15	Cali Cige Mahamed	Beer	Producer	4375755
16	Yissuf Jamac Farax	Gatitaley	Producer	4372662
17	Mohamed Cabdi Osman	Galloley	Producer	4019022
18	Saynab Abdikarim	Erigavo	VC Honey	4418362
19	Ahmed Aden	Burao	Extension Officer	4367503
20	Kamau Kabbucho	PA	Consultant/Trainer	4234647
21	Sadia Ahmed	PENHA	Project Team Leader	4427170
22	Abdirazak M.warsame	ILO	Consultant	4322605
23	Amsale Shibeshi	PENHA	Project Manager	4416203
24	Hassan Hirsi Farah	PENHA	VC Fodder	4324460
25.	Ibrahim Madar	ADRA	Consultant/ Translator	4042225
26.	Fadumo Mohamed Ali	PENHA	Finance Officer	4426579

5.8 PMM PREPARATORY MEETINGS - FODDER PRODUCERS MEETING - ATTENDANCE SHEET

BURCO – 31 MAY 2011

SER.NO.	NAME	DISTRICT	OCCUPATION	TELEPHONE NUMBER
1	Rahid Abdi Ali	Gatitaley	Producer	-
2	Xasan Mohamed Cilmi	Galloley	Producer	4483333
3	Asad Cabdilahe Xirsi	Galloley	Producer	4153364
4	Cabdi Mohamed Nour	Galloley	Producer	4615353
5	Xiis Cabdiahi Ibrahim	Qallocato	Seller	4615353
6	Cabdirahman Yusuf Nour	Gatitaley	Producer	-
7	Jama Ducalale Mahmud	Beer	Producer	4337536
8	Cabdilahe Axmed	Beer	Producer	4321092
9	Xasan Cali Cabdi	Beer	Producer	4331980
10	Jamac Farax Axmed	Qallocato	Producer	-
11	Cabdilahe J Cabdilahe	Qalacato	Producer	4031752
12	Cabdi Yusuf Cabdi	Qoyta	Producer	4346732
13	Salma Ciise Warsame	Qoyta	Producer	4378952
14	Mohamed Axmed Adan	Burao	Producer	4313992
15	Cali Cige Mahamed	Beer	Producer	4375755
16	Yissuf Jamac Farax	Gatitaley	Producer	4372662
17	Mohamed Cabdi Osman	Galloley	Producer	4019022
18	Saynab Abdikarim	Erigavo	VC Honey	4418362
19	Ahmed Aden	Burao	Extension Officer	4367503
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21	Sadia Ahmed	PENHA	Project Team Leader	4427170
22	Abdirazak M.warsame	ILO	Consultant	4322605
23	Amsale Shibeshi	PENHA	Project Manager	4416203
24	Hassan Hirsi Farah	PENHA	VC Fodder	4324460
25.	Ibrahim Madar	ADRA	Consultant/ Translator	4042225
26.	Fadumo Mohamed Ali	PENHA	Finance Officer	4426579

5.9 PMM PREPARATORY MEETINGS: FODDER PRODUCERS - ATTENDANCE SHEET

Erigavo – 4th June 2011

S/no	Name	District	Occupation	Telephone
1	Nasra Adan Ducale	Cerigavo	Producer	4212628
2	Ahmed Mohemd Hassan	Cerigavo	Producer	4217919
3	Ibrahim Saed Matan	Cerigavo	Producer	696176
4	Omer Jama Ahmed	Cerigavo	Producer	778103
5	Ahmed Mohamed Abdule	Cerigavo	Producer	4204410
6	Abdillahi Mohamed Jama	Cerigavo	Producer	392940
7	Abdirahman Mohamed Mohamud	Cerigavo	Producer	4200778
8	Ahmed Mohamed Ahmed	Cerigavo	Producer	773345
9	Ahmed Jama Mohamed	Cerigavo	Producer	4206065
10	Mohamed Hassan Ahmed	Cerigavo	Producer	684382
11	A/razak Yusuf Mohamed	Cerigavo	Producer	776472
12	Hussein Jama Abdillahi	Cerigavo	Producer	4955027
13	Farah Mohamed Ahmed	Cerigavo	Producer	4199500
14	Keyse Saed Abdi	Cerigavo	Producer	4201569
15	A/rahman Warsame Hirsi	Cerigavo	Producer	4112057
16	Saed Hussein Mohamed	Cerigavo	Producer	4200631
17	Mohamed Ibrahim Ahmed	Cerigavo	Producer	4213513
18	Ismail Ali Mohamed	Cerigavo	Producer	4342141
19	Mohamed Omer Ali	Cerigavo	Producer	767470
20	Sahra Hassan Hussain	Cerigavo	Producer	4018148
21	Hani A/rahman Omer	Cerigavo	Producer	777172
22	Jama Ali Ismail	Cerigavo	Producer	4956259
23	C/karim XasanIbrahim	Cerigavo	Producer	4207991
24	Mukhtar Axmed Ismail	Cerigavo	Producer	4203182
25	Ali Axmed Issa	Cerigavo	Producer	-
26	Hassan Hirsi farah	PENHA	VC Fodder	4324460
27	Ismael Coon Mohamed	Cerigavo	Producer	-
28	Yusuf Abdi Ahmed	Cerigavo	Producer	729597
29	Aydiid Aden Ahmed	Cerigavo	Transporter	090775654
30	Keyse Hersi Sacid	Cerigavo	Transporter	-
31	Saynab Ali Hassan	Cerigavo	Producer	4200863
32	Cali Yusuf mohamed	Cerigavo	Transporter	-
33	Ahmed Jama Segulle	Cerigavo	Producer	090356488
34	Mohamed Cali Jama	Cerigavo	Transporter	-
35	Seyneb Abdi Ahmed	Cerigavo	Producer	779482
36	Mahdi Ali Ahmed	Cerigavo	Seller	4083575
37	Sadia Musse Ahmed	PENHA	Project Leader	4427170
38	Saynab Abdikarim	PENHA	VC Honey	4418362
39	Ahmed Ali Hassan	PENHA	Extension Officer	4112026