

**External Evaluation of Aid to Artisans’
Pan Africa Artisan Enterprise Development Project, 2001-2006**

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ANNEXES

1. **Introduction**

In June 2006 Verde Azul Consult LDA was contracted by Aid to Artisans to evaluate the PAED program in Mozambique and South Africa. Three Evaluation Reports were prepared. Report 1 – Central Aspects of PAED, this report focus on management aspects, and general aspects of both countries presenting mostly the perspectives of ATA Headquarters and the Africa Regional Representative, Donors, Buyers and Consultants; Report 2 – PAED RSA Evaluation deals with special aspects of the implementation in South Africa putting into perspective the opinions of the three partners, some of their supported companies and artisans and the ATA South African Office manager; and Report 3 – PAED Mozambique Evaluation, is essentially an artisan impact study, including the opinions of the Management team, of the program in Mozambique.

2. **Evaluation Methodology**

The Terms of Reference (see Annex 1.1 – Scope of Work) set up the approach of the evaluation strategy. The evaluation methodology is primarily based on interviews to key stakeholders of PAED. Different target groups were selected and outlines of questionnaires were approved by ATA. PAED Annual Reports 2002/3/4/5 were also instrumental in the evaluation. The Evaluation Reports (ERs) are based on opinions of more than 156 people. The questionnaires were carried according to the following procedure:

1. 75 Questionnaires (structured) to Artisans in Mozambique (see Method details in Report 3), in the Provinces of Maputo (15 Artisans from July 10 to 20), Nampula (30 artisans from July 5 to 16) and Cabo Delgado (30 artisans from July 12 to 18). Furthermore, in each Province, beneficiaries (25) and non-beneficiaries (50) of PAED were interviewed;
2. Focus group meetings with ATA staff (11 in all); including 5 staff at Headquarters, 2 in RSA and 3 in the Mozambique office as well as with the Regional Director for Africa based in Maputo. These were carried out between the end of June and mid July 2006. Verde Azul directly handled these interviews, except the interview with ATA Headquarters. See Annex 1.9 Summary of ATA Home Office Project Debriefing and Annex 3.1 Mozambique ATA Staff Interview Summary);
3. In South Africa the questionnaires (open questions) targeted around 15 artisans, 12 different organizations and 9 different management staff; between July 12 and 22 (see summary of interviews in Report 2);
4. Interviews with 5 international consultants involved in PAED);
5. Interviews with 5 PAED donors);

6. Interviews with 3 exporters and 5 partners in Mozambique (see Report 3, Interviews);
7. Interviews with 11 buyers from the US;
8. Desk Review of bibliographic reference documents (see Bibliography).

The report puts forward the different opinions of the people interviewed as well as the evaluator's perspective of the overall analysis.

3. PAED Assumptions and overall objective:

The program goal was to alleviate poverty amongst artisans in Southern Africa thereby improving the quality of their lives. In order to tackle the underlying symptoms of the craft sector in the region, namely, breaking away from stereotypes like Kente cloth and tribal masks and in so doing, tap the potential for increased individual incomes; PAED proposed to work in Mozambique, South Africa and Tanzania, on what was identified as the major constraints of the sector: a) lack of appropriate designs; b) limited access to markets and c) inadequate business skills. PAED aimed to reach 5,700 artisans and broker nearly \$3 million (see TOR) in sales with an increase in employment and household income.

The Pan-African Artisan Enterprise Development (PAED) a 5 year program is ATA's second matching grant program in Southern Africa. Implemented between 2001 and 2006 with an overall budget of US\$5.9 Million (of which US\$2.8 from USAID and US\$3.1 in matching grants) it aimed to further expand ATA's reach in Mozambique, South Africa and Tanzania. PAED design builds on a previous ATA Program (RISE 98-01) aimed at technical and design assistance to artisans in Mozambique and Tanzania. RISE was an important experience to build PAED, and gave some insights of the craft industry in the region. PAED is hinged in three areas of intervention -1) market-driven product development; 2) market linkages and 3) capacity building. To implement these 3 areas of intervention PAED's main strategic approach was:

1. To provide Product Development (PD) and Design to artisans through both in-country and long-distance assistance;
2. To provide Market Linkages (ML) through a combination of international trade show exhibition, buyer visits, training with international sales consultants, cultivation of local markets and access to the ATA website. Included in the ML, the program allowed for participation in the SARCDIA International Gift, Toy and Décor Trade Exhibition, the largest trade show in Southern Africa; in addition, artisans participated in US and European trade shows;
3. To facilitate Capacity Building (CB) through business skills training on three levels: in-country workshops, the Africa Market Readiness Program (AMRP) and the US

- Market Readiness Program (MRP). The AMRP can now be offered at both the micro-enterprise and SME levels;
4. To provide a tailor made program appropriate to each country. Due to the great variance in craft sector needs, artisan skills and experience as well as national infrastructure, the PAED program tailored its assistance to meet individual country needs through a tiered approach. In RSA, PAED worked through implementing partners (The BAT Shop at PAED start up and CCDI and Phumani Paper later on). In Mozambique where the challenges in the craft sector were incipient (throughout the whole chain) ATA established a Maputo Office to work directly with the artisans; (In Tanzania, the country program officially ended in September, 2004 and was not included in this final evaluation report.)
 5. To establish an office to handle aspects related to the implementation of AMRP and SARCDA participation and monitoring and advising the RSA partners;
 6. Raise funds at all levels to match USAID core grant.

Evaluation

The Three Evaluation Reports are basically dependent on two sources of information – information from interviews undertaken from the evaluation exercise and review of PAED Annual reports and available literature. On the other hand the interviews were structured, thus allowing a quantitative statistical analysis and opened questionnaires, evaluated qualitatively (roughly 50/50 balance between questionnaires). If the interpretation of numerical evaluation was relatively quite straight forward (mostly based on numbers and averaging) and in some cases relatively easier to enter into a statistical package for analysis, the qualitative analysis is rather more difficult due to the wide range of perspectives about the same issue, based on people exposure to PAED. The evaluator attempted to conclude on a wide range of opinions and at times, may have unintentionally included its own bias. In order to form an independent opinion, the reader should make use of the different interviews attached.

4. Major successes:

ATA has planted the seed for artisan craft to expand and flourish in Southern Africa. This is especially true in Mozambique, where, before ATA, there was no formalized assistance to this sector. Now it is easy to see new and creative designs selling on the streets, in the market places and at the now yearly Craft FAIR in Maputo, organized by ATA. Artisans are attending International Trade Fairs, selling their crafts abroad and formalizing and organizing themselves in order to produce significantly as their orders grow. As PAED increased the sales opportunities and markets to African artisans, individuals and families are now being supported by their crafts. If the tourism industry here picks up as expected, the trade in crafts could also rise, and give an even greater positive effect, “in people terms” - improving the lives of artisans.

More specifically, new designs in wood and other crafts have significantly improved in Mozambique. Before ATA began its work in developing the wood sector, with RISE, Mozambique was not even on the map for the international buyers. PAED program in Mozambique was able to create more demand than actual capacity, which was a success in terms of getting Mozambique on the map in the minds of buyers, a very unique situation where the reverse is often the general rule. Although to be sustainable, quality needs to be always scrupulously controlled. As one consultant reported “inferior products must never leave the office!” Some artisans working in wood now have new, proper instruments with which to work. In Maputo, consultants managed to construct a solar drying kiln with the wood-workers. Although more such kilns need be constructed and delivered, this progress is advantageous as it allows wood products to dry properly, decreasing chances of mildew or breakage. Hence, sales should improve again, because the products are better designed with proper quality finishings.

In South Africa, one of the most tangible impacts of PAED program was the influence on the design of the products produced by the craft producers. Through designer visits, the design mentoring program and the presence of the new designs in international trade fairs, a new step has been taken in the design level of the product produced which has the potential to take South African craft into the realm of industrial design, furnishing and home accessories, and so open a new market. The designs included new, contemporary designs, especially those inspired with the expert help of acclaimed designers. Some designs captured the intrigue and creative inspiration of the crafts people and brought them to a new level of design. As one partner stated, “What I enjoyed about one designer is that he smashed boundaries and opened people’s eyes as to what was possible.” It was sensational.

Sales increased in both countries and have affected positively the standards of living of those directly benefiting from PAED (this is true for Mozambique, for South Africa artisans have also improved their living standards, but since they also received support from other sources, it is difficult to solely attribute it to PAED), sales especially at The BAT shop were remarkable since the PAED initialized in 2001. Gross profit in the financial year March 2005 – Feb 2006 was over \$200,000, double the BAT shop budget when it entered the PAED Program. It is clear from interviews (in the South Africa Report) that many craft producers supplying the BAT Shop have had marked improvements in the quality of their lives over the past five years. Most have, at a minimum, quadrupled their monthly earnings. Still further, The BAT shop has employed two more full time staff members since joining the PAED Program. The sales increase and the opening of new markets has radically transformed 100’s of people’s lives in South Africa. What could be more successful?

Markets and relationships between Mozambique and South Africa are now in place; something new for both sides. It seems that a path has now been cleared for further developments on this route. But for now, Mozambique has been able to capture some of the SA market and has created relationships and partners there that should hold. The network with SA importers became activated specifically from PAED and the hard work and

contributions from all staff, consultants and the artisans themselves. This is an important step, especially for the Mozambicans and should be developed even further with a new phase of the project.

Most importantly perhaps are the people issues--the artisans and staff involved and their learning curve; making them more confident in their craft and recognizing their business potential (artisans and staff alike). It seems that the local staffs, particularly, were very much appreciated by buyers and consultants, being very helpful, communicative and bright. In both offices staff learned how to fund raise, and should a matching grant be a requirement in a next phase, the offices may be better equipped to handle the bulk of this function.

5. Project Management

ATA has a high degree of coordination and collaboration with partners compared to many other development projects the reviewer has seen so far. Most donors interviewed were very positive to the efficiency in ATA project management. In most cases PAED reporting system worked very well and major funders felt very well represented in the implementation of PAED – meaning that the funders’ organization’s objectives were well implemented. Field visits, either to fairs or to a specific site in country served very well to acquaint the visitor directly with staff and the core of the business as well as the degree of involvement and commitment people dedicate to the project, this is a great opportunity to see what one most often only conceives by reading. Most respondents felt that ATA had a good management team, and to cite “... the shift from expatriate to national leadership (in Mozambique) was well prepared and well-timed, and keeping the former manager as an advisor was a good move”. The revised annual reports were well prepared and followed a logic structure making the revision easier and pleasurable. They reflect impartially the project constraints, major achievements and deviations from the plan. Even though a lot of staff changes took place and it was hard to handle by the organization, this did not seem to have affected external relations with funders.

Some management constraints were identified during interviews like: issues of centralization and decentralization authority between ATA USA and the African subsidiaries which improved toward the end of the program. The ATA US support into the RSA ATA was a bit weak, with roughly 3 different supervisors over the life of a 5-year program and also coincided with more support being channeled to Mozambique. The financial management was challenging at times in the beginning of PAED as the then Country Director had to do both financial and programmatic reporting with no accountant, and only later an accountant was employed on a full time basis in anticipation to a new Director to be hired. This led to some challenges in relation to processing and budgeting - the process was slow, and often times charges were late in being charged and required multiple reconciliation. Africa Development director changed 4 times, (mostly at close up phase). The field office grew late in the PAED process, it was recognized that in the beginning it was very stressful to have only one person in field. More thought should have been put into the evolution of staff during the project cycle. In some cases the staff skills were not adjusted to the necessary job

implementation requirements, and ATA did not respond well in terms of filling the gap as they appeared. It is apparent also that in RSA the job responsibilities of the Regional Marketing Manager kept on increasing, without an official and clear job description to follow. It was not clear what reporting channel to use.

The HQ did not manage a sufficient number of visits to the field especially during RISE and the first two years of PAED, which on one hand demonstrated confidence in the field staff but on the other a lack of priority or commitment on the side of the home office. If not only for the moral of local staff, it is very important to have meetings face to face and be aware of actual conditions. Furthermore, in RSA both The Bat Shop and CCDI seem to prefer maintaining their communication channels directly with home office. This is perhaps due to the lack of a clear delegation to facilitate approval and decision making by HQ to ATA SA. On the other hand, in Mozambique, the communication challenge relates also with language differences. In Mozambique, Portuguese is the official language whereas in ATA it is English and most management personnel in the US do not speak Portuguese. Many development projects do not take the aspect of language very seriously and in most cases wrong assumptions are made out of miscommunications. (It is difficult enough to communicate when we all speak the same language!)

A great management challenge (seen as well as an opportunity by many) regards the managing of a multi-funders budget. It was the second time ATA was managing a matching grant, but the first at the country level. Both at the home office as well as in the field, it was challenging to manage the “scope creep”, and there was a feeling that at least in the case of Mozambique that might have affected project effectiveness. Although ATA staff was not completely satisfied with the financial systems, they met the donor requirements that were satisfied. In RSA it took longer to expand to other partners, and PAED mostly focused on the BAT Shop and as mentioned before, PAED was slow in creating the ATASA Trust. There was a lack of “planned progression in RSA.

We asked 4 different groups including Funders (5), ATA managers (6), Consultants (5), and Buyers (11) who were involved directly with PAED implementation to rank their degree of satisfaction from 1 to 10, 10 being completely satisfied and 1 being completely unsatisfied. Table 1 reports the average of the first three group’s perspective on each project item. Table 2 reports the Buyer’s perspective only (buyers questionnaire aimed at different issues). Nine project items were identified in both tables and described under the column “Area of PAED Implementation”. Before filling up this matrix, a qualitative questionnaire on each of the 9 project items were carried, in order that the interviewee. Item 9 is the target group perspective ranking their overall project satisfaction as a whole evaluation (regardless of marks given in each project item; sometimes this value was equal to the arithmetic average). Item 10 is an arithmetic average from items 1 to 8; we used this value as a term of reference. In the buyers survey we used quite a different questionnaire outline, and so the analysis is done separately.

Table 1 – PAED overall evaluation perspective based on Funders, Staff and Consultant interviews.

Item	Area of PAED Implementation	Funders	ATA Staff	Consultants	Average	Min*	Max*
1	Project design appropriateness	7.2	7.9	7.0	7.3	3.0	9.0
2	Project output/indicators appropriateness	6.8	7.1	na	7.0	3.0	9.0
3	Project implementation satisfactoriness	8.2	7.6	6.0	7.3	4.0	9.0
4	Quality and timeliness of communication and reporting	9.0	8.1	5.4	7.5	4.0	9.0
5	Fiscal management satisfactoriness	9.0	6.3	na	7.6	7.0	9.0
6	Project management satisfactoriness	7.2	6.8	6.5	6.8	2.0	9.0
7	Project cost effectiveness	7.0	6.8	7.5	7.1	5.0	9.0
8	Consulting Appropriateness	na	8.3	7.9	8.1	5.5	9.0
9	Overall satisfaction (ranked)	8.1	7.5	7.5	7.7	7.0	9.0
10	Overall satisfaction (average)	7.7	8.1	6.6	7.5	4.8	9.0
1 - 100% unsatisfied, 10- 100% satisfied							
na - not applicable to group							
* - these values are from questionnaires							

The Evaluator believes that although this type of evaluation (numeric rank) might seem attractive and easy to report, it also might include a certain degree of bias that needs to be assessed carefully, because each evaluator has its own “iconoclastic standard”. In most cases we tend to remove this Bias through an average, which make sense when ranges are not wide (in this case it is not true for certain items). The other way to remove bias is trough analysis of direct interviews.

PAED ranked on average 75% overall satisfaction. On a qualitative way, looking at PAED as a whole (item 9 has to be seen as a relative measure) Funders and Consultants believe that the project was better than their arithmetic average is in fact showing, while the Management Staff feel the opposite, in other words, the staff was less satisfied with different project items than their overall satisfaction with the Program. From the Minimum and Maximum values (Min and Max in Table 1) we also observe an enormous degree of variability within each group. This variability as we later see is mostly based on how certain issues on project implementation have impacted particularly on certain individuals, and cannot be taken as a

general rule (handicap of this assessment method). At the same time consultants on average were more critical than any other group. An analysis of the data indicates that the following areas were below average (75%):

Project management satisfactoriness (68%)

Project Outputs and/or indicators (70%)

Project Cost effectiveness (71%)

Project Design Appropriateness (73%) and;

Project Implementation Satisfactoriness (73%).

Project management is indeed an issue that only stakeholders that get involved inside the PAED program (e.g. mostly Management Staff, and with some limitations consultants and Buyers) might have more appropriation to rank. Based on interviews, the lower rank to Project Management might reflect the lack of response (or delay in taking decisions or not taking any decisions) by the HQ1 regarding different management requests (finance, marketing, design and program). There were contributing factors from home office that affected the program overall such as: 1) not validating field based staff opinion; 2) not giving credibility to SA office and its role; 3) financial expenses late in being actualized and affecting budget projections; 4) sporadic support from marketing in terms of implementation of programmatic activities, i.e. exporter program in Mozambique when asked for assistance in its development and implementation no feedback was given and local marketing team left to its own to implement a very complex program; 5) lack of experience in delivering the quality and kind of service at the SME level should have been compensated by support from ATA marketing team and 6) the need to revise Indicators and certain aspects of the M&E system that were never followed. Project management could have also been affected negatively due to the match grant (scope creep and increased activities). From what was mentioned above we may explain the difference in the degree of satisfaction with the Fiscal Management between the Funders (90%) and ATA managers (63%). In certain aspects of PAED management and more internal to ATA like this one, we can just understand that the Multi-Funder needs were demanding and stressful, but apparently ATA did well.

RECCOMENDATION: improve internal management, with more delegation to the sub-offices to take decisions and improve the management of consultants.

¹ Look at interview summaries with Africa Regional Director and Mozambique Management Staff

Table 2 – PAED overall evaluation perspective based on Buyers interviews; (distinguishing between Buyers for South Africa and Buyers for Mozambique)

Item	Area of PAED Implementation	Avg RSA	Avg Moz	Min. RSA	Max. RSA	Min Moz	Max Moz
1	Quantity of communication	8.1	5.8	6	10	4	7
2	Quality of communication	8.8	6.0	8	10	5	7
3	Timeliness of communication	8.0	5.5	6	10	3	7
4	Packaging and packing	9.0	5.9	6	10	3	8
5	Timeliness of order	7.8	4.5	5	10	2	6
6	Quality control	9.0	6.3	7	10	5	7
7	Breakage	9.8	6.9	9	10	4.5	9
8	Design	8.3	7.5	8	10	7	8
9	Overall satisfaction (ranked)	8.3	6.0	7.5	9.8	5	6
10	Overall average of the above	8.6	6.0	7.5	10	5.3	7.1

(Note: some received questionnaires have no information in some questions because some buyers were still expecting to receive their goods at the time of survey). According to the Buyers' perspective, PAED was ranked in overall satisfaction at 86% for RSA and at 60% for Mozambique. Qualitatively, Buyers in Mozambique were generally less satisfied with the different areas of implementation reported, than their counterparts in RSA. From the Minimum and Maximum values (Min and Max in Table 2) we also observe an enormous difference in satisfaction levels between Buyers for Mozambican products and Buyers in South Africa.

For RSA put more attention on the level of:

- Timeliness of order
- Timeliness of communication
- Quantity of communication

For Mozambique put more attention on all aspects overall but with special focus on:

- Timeliness of order;

- Timeliness of communication;
- Quantity of communication.

Again, project item 10 is used as the term of reference. As we will see later on in this analysis, that country differences may largely be due to the lower levels of sophistication and experience in the craft market for Mozambican artisans and as identified in the country reports, the craft sector in both countries are in different development stages, RSA with clear advantageous position in all respects.

6. The Appropriateness of PAED and its Design

PAED assessed the overarching craft sector problem well in one way, but underestimated the challenge in terms of the time needed to promoting entrepreneurship in Mozambique and the development of strategic partnerships in South Africa. Development and strengthening the local export side is still very much dependent on ATA's internal structures.

ATA's approach in RSA from the onset was to liaise with local partners, but in Mozambique the sector development was and still is very incipient and ATA partnered directly with the artisans (beginning in RISE program and now through PAED). So although this was a necessity to "inject" energy into the sector and create a foundation, the transition to passing that role to the exporters was not fast enough and ATA Mozambique continued throughout PAED (until the end of the last year of the project) to serve as a direct player in the craft value chain. In general it worked very well to address artisans directly in Mozambique and to work through partners in SA, particularly having in mind that PAED had only to put very small amounts of effort for the results obtained. The sector constraints were in general well identified, although the priorities in relation to implementing strategies were late in the project cycle (e.g. the establishment of the Resource Center in Moz, the ATASA Trust legalization in SA, and the partnering agreements in SA only at the last two years of PAED).

There is no doubt that one of the best ways to add value to natural resources is through development and promotion of the arts and crafts sector - so PAED was very appropriate in this respect, and even more so in Mozambique, where it was working alone, and where no formalized craft structure existed per se. PAED was fundamental for craft sector development in Mozambique; they "planted the seed" in such a way that artisans and other stakeholders could visualize the sector potentials that were not pictured before.

Outreach and Sales

The number of directly reached artisans in Mozambique were 495 and in South Africa 385 through the Bat Shop. The number of indirectly affected artisans is difficult to assess for the following reasons: 1) in Mozambique the production and distribution of a Bulletin "As Mãos Falam" was not regular and was not monitored adequately, and this was the major outreach

strategy in Mozambique (see Report 3 about the distribution of Bulletin); 2) in South Africa the aim of PAED was not really focused in the number of artisans, but besides other things, in building and strengthening the partnerships, so the number of artisans reached by each partner was not under the direct influence of PAED; and lastly 3). PAED is not the only program the partners in RSA implemented. In both Annual Reports (BAT Shop's and PAED AR, 2005) a figure of approximately 3000 and 1.100 artisans may have been reached indirectly through PAED in Mozambique and RSA respectively.

If one were to look at existing systems for measuring success of a program (sales) and, particularly, cost effectiveness, it would be easy to criticize PAED and say that the output in program costs was significantly higher than the earned income of individuals of the craft sector as a whole. In other words if PAED spent US\$5.9M to produce sales of US\$3.0M it may indicate already a degree of 50% inefficiency (or even less than 50%, since right figure to use would be profit to artisans). On the other hand, the return on investment of US\$5.6M at for example 7.5% would generate at the end of 5 years US\$7.0M, or an income of approximately US\$1.17M. The question is whether the return to artisans reached is comparable to US\$7.0M today or potentially will be comparable to \$10.4M in 5 years time. If we accept that PAED reached directly approximately 1.600 artisans, the question is: would these artisans rather receive US\$3.933,00 directly into their hands instead of being capacitated through the program? Or in other words will the benefits now and in the future, compensate for PAED costs? Some responses will only come in the future, but as suggested in one interview "... a very substantial number of rural people in most developing countries derive part or all of their income from artisan activity. If ATA only reaches a relative handful of these artisans – no matter how effectively – the question arises whether it is a program that favors a small number while ignoring the real problem." While this may be the case, it is also true that individual artisans may now be better equipped to gain considerably in the future, as the tourism industry takes off. This is particularly true in the case of Mozambique and South Africa. Many artisans will have improved their position for future economic gain. The reason it is difficult to assess efficiency ratios in this type of projects resides in the fact that a lot of PAED efforts were dedicated into capacity building not only training but also on infrastructure, this hopefully will bring the desired dividends in the future.

Is the craft sector ready to take off in Mozambique on its own without outside support from industry professionals? – No, definitely not. Even in RSA, where the sector does not even compare on any scale to what we encounter in the Southern African region, some support is still need in order to guarantee the desired quality. Tapping the existing RSA infrastructure and institutional support to promote craft development in the region is and will continue to be very strategic. However as mentioned in the buyers interview in both countries the need for ATA country offices are still important in order to guarantee what a local vendor should do, and in fact is slowly doing – prepare and encourage buyers visits, make necessary recommendations, take orders, resolve conflicts, and guarantee the desired trust and confidence.

7. Funding PAED

PAED was based on a Matching Fund mechanism; as such it was a challenge as well as an opportunity to have to raise 50% of funds. Being able to identify specific themes that responded to the Matching Fund and simultaneously did not deviate from PAED objectives was most probably a great challenge and success of ATA as 100% funding was achieved. It seems however that once the match was met PAED got less priority at HQ. In the last year there was not enough effort by HQ to raise additional funds to carry on the project, but the effort was undertaken at country level. At regional level a fund raising strategy did not exist, and the information was not centralized. Also, local staff had not been trained (via 3rd party course or seminar) on how to fund raise and cultivate donors, but apparently (in interviews with ATA Staff) can carry these funding activities in the future, since they have been exposed to other experienced ATA staff in the same exercise.

PAED was designed to promote the economic advancement of the craft sector, building livelihood assets, from maker to market for an otherwise excluded sector of the economy. Artisans added value to natural resources and developed products for the market. As such, the project was genuinely innovative: “it promoted natural resources to access finance and the market” (from funder’s interview); this was unique in the craft sector and some funders think it to be very strategic and even buyers are consistently seeking for different types of certifications. To be ahead of the market the evaluator suggests to work in order to: 1) guarantee that raw materials originate from sustainably managed sources; 2) products are from socially responsible businesses; 3) if possible project approach to address vulnerable groups, specifically women.

In summary the major reasons to fund PAED:

- ATA’s track record and reputation;
- The fact that PAED was partially funded (by USAID);
- Environmental and social integrated issues;
- Funding applications well prepared;

8. Capacity Building

The huge challenge in the capacity building (CB) program was the low literacy and numeracy levels of the craft sector both in Mozambique and RSA (particularly Kwa Zulu Natal based enterprises). Another aspect is that many artisans in the region still do not grasp the full potential of what is possible and so their craft activity is taken more as a hobby than as a business to make money.

In RSA the CB component needs more targeting –and the designer mentoring program needs to be formalized, and have its own curriculum so that it can gain a reputation like

ATA's MRP and AMRP training. In Mozambique there was a need to promote an inexistent designer class – and PAED promoted designer competitions using advertisements in the newspapers that resulted in a few emergent junior designers, it did not produce the desired effect because the available funding did not allow for a long term approach to a crucial component working toward sustainability. With the exporter program in place but not maximizing results, it also did not consider the linkage between emerging designer and exporter.

The national training workshops conducted under RISE and continuing into PAED had the intention also to increase the network exchange between artisans and create a focal point for sharing common interests and challenges. With the linkages made and an obvious need for more artisans to be exposed to the training, and even more than just the owner or a representative of any one enterprise, the regional w/shops were instituted during the last 2-3 years. This also resulted in a more cost effective training method (with local ATA Staff traveling to the provinces as opposed to having to bring large numbers of artisans down to Maputo). In all PAED invested more resources in training in Mozambique than in RSA as a result of different craft stages of development.

While training may have produced the expected results in Mozambique and RSA (statements from PAED Annual Reports, and interviews) and is gaining reputation in the African Continent, it is still not decided on a how to assess this training program. Of interest to improve the AMRP are some comments received from the management side (see RSA partners interviews) in order to make the course work to be more targeted to audiences. The future of AMRP will fall under the responsibility of the ATA's Regional Representative and will constitute one of the ATA SA Trust's keystone programs.

In the Evaluator's perspective an important issue underlines and impacts on any expected outcomes on the craft development in the region and in Mozambique in particular. An enabling craft development policy needs strengthening, to formalize a business is difficult, slow and still seen as a disadvantage, as people (artisans and entrepreneurs) believe that by going formal, more tax has to be paid. So a great part of craft sales or craft outlets are through informal markets mostly fairs (or street vendors) continue to represent a great boost and a new opportunity for the African artisan, but it may not be the way to build customer trust and confidence, much less quality control. Due to existing dynamics, it is difficult to find a successful craft shop in Mozambique, as costs of management, quality control, and space, built in the products for sale is not competitive with those in the informal market.

In Mozambique, the high focus of PAED on artisans and the inherent intention to transform artisans into business people was only detected later on the project cycle as a flaw, in addition focus should have been given to crafts business oriented individuals, and the creation of a solid and sustainable exporter group was short of the intended goals (even though ATA demonstrated a high degree of effort in this respect). The consultant working

with business plan development with the exporters and Andarte felt that the scope of work was not well identified resulting on unfinished assignment, which may also have contributed into the failure of this outcome. Successful Business models (like the Bat Shop in SA or others) need to be franchised or reciprocated in the region, having in mind that the right individuals a conducive and favorable craft development policy exists. It may be possible that the Mozambican market scale is still not attractive for many exporters to be involved. Of course any business initiative has to be led by an “engaged and passionate” person (like in The BAT Shop) who combines a strong inclination to the craft business and a clear orientation to the market. This was most probably the greatest weakness in the Mozambique craft sector development.

9. Customer Service

Customer service is a difficult cornerstone to overcome locally (and one critical point raised by some buyers) because it is also a question of culture. In Mozambique, due to limited capacity to produce, and the demand for products from different groups, it was necessary to consolidate a large order farmed out to various groups. Differing work ethics and circumstances often led to one group delivering on time while the other delayed and this may obviously result in a late shipment. This aspect represents a tremendous challenge technically and financially, which may preclude many Mozambican exporters from the market.

ATA had to play the exporter or direct link to the producers for longer than expected, and this brought a mixed bag of problems and created dependency that will be painful to transform yet entirely feasible. Overall the situation become very comfortable for all involved, the artisans felt that they could trust ATA as they were a foreign organization, the exporters only were responsible for a small amount of the exporters’ work and ATA did most of the time the consuming day to day work to ensure order fulfillment, and the buyers, knowing ATA or the fact that they have been around for so long created an almost instantaneous trust in the business relationship.

Despite this added layer of dependency created there is nonetheless the need for a middle person who plays a critical role in promoting craft and ensuring continued orders for the producers. Many clients put forward 50% of the funds when putting an order (this is what ATA is promoting) but there are other clients that don’t pay anything. This is a constraint for the local exporters, without much access to capital. There is also the problem with artisan side, since they always need an advance (usually 50% of the ex-factory price) for initial costs of production and daily survival. ATA many times came forward with program moneys to cover for that in the short term but the exporters who will pick up the ATA role from here in terms of direct linkages to buyers will not have easier access to money and that could cause a strain in producer/exporter relations. PAED have about a 63% buyer satisfaction in Mozambique and 83% in RSA. ATA is doing a lot of work to change this cultural trend. ATA is probably working alone here, and some of the good results either in

improving delivery commitments and design and product quality need to be recognized both in Mozambique and RSA. This is an important aspect for ATA reputation.

PAED created the link between a South African buyer and Mozambican producers, and although this resulted in this buyer being the main importer of Mozambican products, ATA is not aware if his approach regarding fair trade with Mozambican artisans is maintained, but feels to be a sensitive issue. Also the exporter program was not producing desired results, and ATA feels that it still needs an intense mentorship based on a one to one attention; the question of ethics needs also to be addressed as many would just reproduce copyrighted items without permission and sell them in the market. In general ATA needs to remove itself from the value chain, which proved very difficult to do in Mozambique.

10. Communication with Consultants

Most issues are already addressed above, under project management. But the Evaluator wants to stress again that improving communication with consultants may produce better outcomes. PAED would achieve more from this group of consultants, had the headquarters departments (marketing and design) kept: 1) a closer touch to the consultants work; 2) their own capacity to deliver; and 3) the degree of absorption at their target group. In some cases consultants were not prepared with background information about their target group. For example, one consultant exclaimed "...I had no awareness of the real challenge until I was on site..." and another, said "...I was left with the feeling that there wasn't enough active involvement from the office to plan the consultancy." Or even "relationship with the design department, and marketing department were very difficult". It seems that the country office and in some cases the Bat Shop was not so involved in the planning process and preparation of a consulting mission, although most consultants felt great support from the Mozambican Staff and specially from the actual Africa Regional Representative. Here was a perceived criticism that at times, the Mozambique office was being burdened in work that should not have been their primary activity. Many consultants suggested that they needed more time than what they were actually allocated.

11. Steering PAED

RISE should have given *rise* to a better grip on the M&E system for PAED. The major tool used was the DIP, however, the data collection worksheet was difficult to implement, and weak feedback was given by headquarters for improvement suggestions resulting from the field implementation. Furthermore, a pre and post test evaluation system for the AMRP was discontinued due to weak results in assisting to improve AMRP, and to miss to accurately measure participant learning. A new oral assessment is used now, but no formal assessment was proposed yet. An extended PAED needs to improve the monitoring and evaluation system by using indicators that are clearly defined, in such a way that yearly assessment criteria is maintained from one year to the next. At the same time, some indicators were complicated to measure (e.g., % of wholesalers reordering within 8 months or the number of participants covering their training costs). Although certain data was very much country related and the development of specific methods dependent on the country office, there was

other data (e.g., target groups and outreach, income generation, etc.) that should have been collected and analyzed in a systematic way in order to provide clear direction of the project towards these indicators.

The outreach of PAED was another issue given low attention to be tracked. Mostly in Mozambique, the distribution of the bulletin (major outreach strategy) was not monitored carefully. If sales and outreach were key indicators of PAED, then we would expect the monitoring system to elaborate more on these results. E.g., how PAED defines a direct beneficiary, indirect beneficiary, and affected artisan needs clarification. Evaluator has not seen any detailed studies about Return on Investment or other Macro Indicators that would allow a comparison of PAED with other development initiatives, which would allow us to take some lessons for the future, in this issue. The reviewer suggests the use of a combination of social and economic indicators; certainly so if we accept that in developing any initiative in an incipient fragmented sector, one has to reinforce the institutional building capacity at all levels. Having noted the challenges about the existing M&E system, we recognize that there are also good indicators in PAED that were well accessed during the project implementation.

12. Impact and Sustainable effects:

It is patent in both country reports that the impact of PAED on those directly benefiting from PAED, was demonstrated, the evaluator is clear about the effectiveness of PAED, from results encountered in the field. Sustainability in PAED can be evaluated from different angles. The most tangible measure is in fact how reproducible can the major project outcomes be in the future (after the termination of PAED). Overall we can only speculate that ATA involvement in the craft sector is still needed, maybe more so in Mozambique than in South Africa. It is unquestionable that PAED left an important footprint in the craft sector, on the regional scale (both Country reports indicate a clear impact on those involved with PAED). Funding was always guaranteed to match the USAID grant. Proposal writing is at times a consuming exercise and an initial step into getting a grant, but important as well is the reputation the grant seeker has in the market. ATA has demonstrated skills in both areas, but it may be challenging for the country offices, or what will become of them, to seek funding completely independent of ATA. At issue is if these offices have the same reputation and track record as ATA headquarters do. During PAED, strategic alliances never really managed to coalesce in RSA, and in Mozambique PAED can only reach sustainable effects if funding continues. It is still soon to say that ATA's initial mandate is achieved.

13. Next steps

The major challenge (probably for the next phase) is the need to build and strengthen the creation of strong local stakeholders in the craft sector. This is related to all aspects of the project intervention. This is not only about institutions but also about developing local individual skills. It should be noted that PAED has made some important headway in this regard. In Mozambique more emphasis needs to be on the creation of individual craft

business skills, and in both countries strengthening the local PD skills while taking advantage of teaching and learning in the group dynamic, thereby maximizing the benefits of international PD experts needs to be accomplished.

The exit strategy of PAED is not clearly specified and should have been defined and realized in the last 2 years of the project cycle. Initiatives like the Technical Resource Center and the Wood Bank although important if implemented early in the project cycle (at least before mid-term), can hamper staff time that must be allocated to more priority issues. As many interviewees referred to this- PAED needed more time than was planned to achieve the outputs on a sustainable way both in Mozambique and in RSA.

If ATA continues support to this sector, it should focus more on promoting Craft Fairs and give stronger emphasis on Product Development and Design, mostly through exchange of experts in the region with a mix of international specialists. ATA should continue to promote as good practice to have a local expert partnering with an international expert.

14. Recommendations:

Promotion of formal Fairs should continue, but more focus also in places of high tourism points, in different places of the country. Encourage access to those fairs is also important, (promote local fairs);

Initiate linkages with other institutions like the Catholic University in Beira. They may not have a design school, but have an entrepreneurial approach and they do have a business management school. From a consultant's point of view, "they have a forward looking strategy in training new emerging businesses and they want entrepreneurs to remain in the provinces." Strengthen relations in formal training and continue targeting a business approach. Also broader linkages with local designers and entrepreneurs-stimulating this market could be effective. It is very important to make sure the already established relationships with South Africa are continually stimulated and nourished.

Crafts in Mozambique need more work to sustain access to wood, especially precious wood. Plus the consumer has been following a trend into "natural" products, and guarantees that product comes from an environmentally friendly source and is produced by socially responsible practices. Perhaps not only in fibers (textiles), wood, beads (nuts, beans), but also natural resources in terms of essential oils and soaps, etc.

Perhaps the focus should not be on Exporters themselves, but on creating or promoting an enabling environment for exporting (may give follow up on the export constraints identified in the Export study done in Mozambique). Credit access and cost is essential in the export development business. Work with local credit institutions and may be put the guarantees to easy the risk cost of the borrowed capital. But also important is the control of quality and business ethics;

Create a roster of craft service providers for each country and the region, and promote those that demonstrate more skills and business ethics;

Train extensively staff, artisans, exporters and government officials in Fair Trade and Ethics in business practices. Ethics in business seems to be an issue important to donors. Maybe get funding just on this training activity –to organize seminars on this issue specifically. This is going to affect prices, the market, and all aspects of this industry and it would be advantageous to get it right now, as early as possible. Look at fair trade certification not only in wood, but also social certification. One consultant mentioned a group that works in fair trade in the tourism industry. If the methodology here is good, perhaps this could be a starting point and procedure to follow.

Customer care needs continued attention. Artisans and their business managers need to understand that the buyer (the customer) is always right, hence customer service and satisfaction;

In RSA the capacity building component needs to be more targeted- and the designer mentoring program needs to be formalized and have its own curriculum. This way the mentoring program can have its own stature and gain a reputation like ATA's MRP and AMRP training;

Outreach strategies in order to expand support to the craft sector aiming specific groups need to be addressed. In Mozambique promote institutional support combined with visit/train exchange programs, and continue with information exchange (i.e. “as Mãos Falam” with appropriate distribution and monitoring);

More work needs into strengthening local institutions and promote regional exchange.

The support to the craft sector appears to offer an opportunity to deliver large numbers of impoverished people into improving their standards of living and offer employment and income possibilities to the otherwise excluded layer of the South African society. The strategy to work with partners has maximized the outreach of PAED. The country with a rich infrastructure offer unique opportunities to the South African Development Communities (SADC) especially, and other countries in general, and continuing to keep South Africa as a hub to ATA craft development in Africa is a good strategy. ATA's support to Product Development and Design has been praised and has opened new horizons into the craft industry.

15. Introduction

More South Africans every year are making their livelihoods producing crafts, particularly the previously disadvantaged town ship dwellers. Most people in rural areas have low educational background (numeracy and literacy) and so have very few entry points into the economy to earn an income. Craft is one of the few entry points² available to South Africans presently excluded from the formal economy. It is estimated that the craft industry employs an estimated of 17%³ of the employed South African population (another study⁴, estimate that at least 200,000 people are active in the creative craft sector and up to 1,2 million are active in the sector and related trades). The first piece of policy development pertaining to the arts appeared in the 1996 White Paper for Arts, Culture and Heritage. The document stressed the need to explore the potential for the sector in crating jobs and income, together with the need for the government to play a coordinating and promotional role within it. As a result the Department of Arts and Culture (DAC), formulated "craft" as one of the 4 pillars of potential economic growth, alongside music, publishing and film⁵. The major obstacle to the growth of the industry (also identified in other studies), has been attributed to the absence of any meaningful interface between producers and markets (Gayle, 2005). Between 2001 and 2003 over Rs 64 Million have been secured by DAC to fund projects and initiatives in the sector, under the "Investing in Culture Program". Spin offs of this program are "Craft Imbizo" a market place to bring together producers and entrepreneurs and to assess the sector on government development strategies; "Ezama Xhosa" a subsidized retail outlet; strengthening of the "Craft Council of SA", an NGO facilitating training, gathering and disseminating information; the "Cape Craft and Design Institute, CCDI" (in more detail

² Cultural Industry Growth Strategy (CIGS). DAC, 1998

³First National Bank Statement at the FNB Craft Now Exhibition 2004, on the web site of Department of Art and Culture

⁴ Afripolitan, 2003. Opportunities for UK design consultancies in South Africa, a design scoping study report. Commissioned by Trade Partners UK.

⁵ Gaylard, J., 2005. The craft Industry in South Africa: a review of ten years of democracy. Gale Group, 2005

below); “Create SA” for the development of accredited work-based training programs in the areas of craft productions, enterprise development, operations management and product development.

Three critical issues have to be addressed according to Gayle, 2005: 1) Development of clearer institutional arrangements for craft development; 2) More strategic focus on strengthening the skills base in the craft sector; and 3) greater sensitivity to appropriate models for developing craft production.

In South Africa the PAED program began in 2001 with one partner; the BAT Shop in Durban, Kwa Zulu Natal. In the fourth year of PAED, a second partner, the Cape Craft and Design Institute (CCDI) in Cape Town joined the program. In Jan 2006, a third partner Phumani Paper, was integrated into the final year of PAED. The relationship between ATA and each partner has been designed to suit the individual profile and needs of each partner and has, in the case of The BAT Shop, changed over the five year PAED Program. As a result of this growing and changing relationship between ATA and their partners in South Africa and the different stages each entered the program, this final evaluation of the PAED program in South Africa is as much, if not more qualitative than quantitative Indicators are mostly relevant for the Bat Shop not for the other two partners (see DIP and MOUs). Each partnership is described and reviewed separately, and summary of interviews are at the end of the report.

In some areas SA is still carrying the burden of apartheid years. Unemployment is close to 40%, crime and corruption is a major problem especially in inner cities, suburbs and townships. HIV is one of the highest in the region 30% (and possibly above) affecting mostly the poor and “previously disadvantaged”. Being aware of these problems besides other policies SA government is promoting training and education initiatives, and the Black Economic Empowerment (BEE) principles to employment and company ownership.

The exchange rate depreciated sharply toward the end of 2001, but has regained lost ground during recent years. In 2002 alone gained 38% against the US\$. These exchange rate variations affected the volumes of export and sales orders in PAED. Interest rates are still high at 17% and borrowing or loans are still difficult for the normal SME.

A Creative Industries Government Study (cited under the Afripolitan Scope Report, 2003) and from interviews published on the DAC web page conclude that craft sectors built mainly on domestic demand and local markets may have greater sustainability and in overall bring more income to the country than those sectors dependant on export.

16. Methodology

Interviews were conducted in South Africa over twelve days between June 22nd and July 3rd 2006. In the case of The BAT Shop and CCDI, Managerial staff, intermediary product development staff and craft producers were interviewed. As the craft producers working with Phumani Paper are based in the Limpopo province, some six hours drive from Johannesburg, it was only possible to conduct interviews with the managerial and product development staff involved in the program. Introductory and concluding interviews were also conducted at the ATA's office in Johannesburg with the Regional Marketing Manager in South Africa.

Questionnaires were drawn up prior to conducting the field interviews, however, as the circumstances of each PAED partner varies considerably, additional questions and areas of discussion were developed with all those interviewed and what follows is a report on the findings, not completed questionnaires. Summaries of each interview and data gathered during the evaluation are also included at the end of the report.⁶

17. South Africa Strategic Approach And Goals

PAED objectives:

- a. The BAT shop to respond effectively to market demands;
- b. To build Bat Shop's operational and Training capacity;
- c. To build a network of strategic alliances in South Africa;
- d. The Bat Shop uses ATA website as a marketing tool to supplement BAT's and ATA's marketing efforts;
- e. Develop and expand marketing and sales opportunities for South African artisans;
- f. Provide artisans with business development services
- g. The BAT Shop provides training design consultancies and market link services to artisans after EOP;
- h. Artisans are able to develop quality products for international export independent of ATA.

⁶ See interview summaries in Appendix 1- III and Organizational Development Indicators and Targets Appendix VI

18. PAED RSA Main Stakeholders

In South Africa, with a more complex and sophisticated Craft Sector with strong presence of many strong stakeholders and a supporting craft trading legal framework, ATA reached the artisan sector by building partnership agreements with important South African Stakeholders (with whom it was signed Memorandums of Understanding, MOUs). For the purposes of this evaluation, the model of partnership entered into between ATA and the individual partners will be described briefly in this section. The different approaches and models of operation each partner applies within their organization will also be described.

Notwithstanding the relatively high degree of development in RSA compared to other countries in the region, crafters in rural areas lack the access to the degree of infrastructure sophistication (and in most cases still lack access to piped water and electricity) that exist in the main cities.

The BAT Shop has direct contact with the craft producers and is responsible for the quality control, design and development of their product. The relationship with the marketplace is also directly administered through them. The CCDI is a larger organization which doesn't produce or market its own product but have 550 participating craft enterprises throughout the Western Cape whom they support through training and access to market. Some of the groups promoted by the CCDI are similar to The Bat Shop in their structure and employment creation objectives. Phumani Paper markets the product of 17 small enterprises throughout the country and has direct involvement in the management and economics of each enterprise.

The particular support ATA has been able to give each of the South African partners through PAED has differed in the temporal scale and approach according to the particular strengths, weaknesses and needs of the partnership. All partners have been provided with professional designers to help them in their product development. All have had access to the African Market Readiness Program (AMRP) in Johannesburg and some to the Market Readiness Program (MRP) in New York. As the ATA presence in South Africa has evolved so has the relationship between each partner and ATA, and the level of support each partner has received. The formation of the formal South African representation of ATA in South Africa, ATASA has also influenced the nature of each partnership.

The Bat Shop

The BAT Shop was the first and only South African partner during the first three years of the PAED program. In 1999 the BAT shop was privatized (from non- for profit (NGO) to profit making organization) The BAT Shop is affiliated with the Bartel Arts Trust (BAT), promoting art development in rural areas of KwaZulu Natal. Growth in all areas of BAT Shop activity during the implementation of PAED (BAT started in the program in April 2002) was rapid and important. In addition to the practical support the BAT Shop received during the PAED Program in the form of training, access to trade fairs and design consultancies, regular institutional financial support was given towards the expenses of the BAT Shop staff and the office running costs. The BAT Shop is run on a model particular to

a reasonably small scale organization, where the General Manager and founder, Marisa Fick-Jordan has direct contact with all the craft producers, is responsible for the product design, the management and the marketing of the BAT Shop products and is the driving force behind the BAT Shop. A large percentage of the funding and support made available to the BAT Shop has translated into tangible benefits for the individual craft producers, raising them out of extreme poverty to a life with self-respect. The auteur-driven nature of the BAT shop and the personal relationships forged with ATA staff and consultants during the partnership impacted the implementation of PAED over the five years. Having entered PAED before the registration of ATASA, the lines of communication between ATA and the BAT Shop have changed over the five years of the PAED program. However on the whole, they have been directly between the BAT Shop General Manager, Marisa Fick-Jordan and the ATA home office in the US.

CCDI

CCDI commenced a two year program with ATA, funded by the Kellogg Foundation. The main component of the CCDI / PAED partnership, which began in the fourth year of PAED, was the support given in product development process leading to improved market opportunities in both SA and the USA. American designer Stephen Burks worked with 6 craft producers each year, over two years. The new designs from the first year were shown at the trade fairs and contacts were provided with international buyers to market these new products. The designs from the second year will have been exhibited by the end of PAED but had not been exhibited at the time of the interview. The designs were quite different to the usual products made by the craft producers and required many months of continued support from a product-development team coordinated by the CCDI, supported by PAED. The products are yet to find their place in the market but there are signs that some may result in repeat orders from buyers brought in through the PAED program. The CCDI has the line of communication with ATA US through the ATA staff in Johannesburg. The high level experience of the CCDI management staff makes the necessity for support from staff in Johannesburg less necessary and it was even suggested that it could be eliminated altogether. The first group of participants was selected in partnership with ATA South African director Frances Potter. In the second year the process of selection was made only by CCDI management. Some of the enterprises selected were companies and organizations with their own management staff and product developers. These individuals were also involved in the implementation of the PAED program and some were interviewed as part of the final evaluation. The CCDI also sent a number of craft producers and design mentors to the African Market Readiness Program (AMRP) and to the Market Readiness Program (MRP).

Phumani Paper

Phumani Paper entered into their partnership with ATA in the last year of the PAED Program. As an institution it is in a phase of transition, coming out of six years as a government supported project run out of the University of Johannesburg as part of their Poverty alleviation program. It became independent in May 2005 and soon after formed a

partnership with ATA who is supporting Phumani in becoming more market driven. A designer contracted to ATA worked with two of the Phumani business units producing in the Limpopo province to assist them in product development. Two design trainees worked with her as part of the ATA design mentoring program. Coming into the program in its last year, the relationship with this partner is conducted almost exclusively between the ATA staff at the Johannesburg offices and the Phumani Paper staff in Johannesburg.

ATA South Africa Trust

ATA SA Trust (Aid to Artisans South Africa Trust in this text just ATASA) was established in South Africa in April 2005 in the fourth year of the PAED Program, in this way formalizing the presence of ATA. ATASA is a subsidiary of the United States based ATA, Inc. A legal identity was needed to formalize the ATA presence in South Africa. And it was also believed that it could facilitate fund raising locally. The trust is comprised of 7 trustees (of which 3 are South Africans and 4 are ATA's Staff). It has two ATA Staff members who manage the logistics for the activities of the PAED Program- coordinating the ATA Stall at the SARCD Trade Fair in August, the Africa Market Readiness Program in Johannesburg twice a year and the product design support with the partners. Although no additional funding has yet been raised through ATASA, it is hoped that future fundraising will be accessible as a result of ATASA's activities.

Recommendation: Due to the evolving nature of the craft industry in South Africa, a study of the best model of partnerships between ATA and existing Craft Institutions in South Africa could be beneficial in order to assess the areas best served by ATA support in the future. The MOUs seem to work well and may be improved if targets could be added to it. If targeting becomes important in the future (some RSA organizations may have a clear focus in special groups and regions than others, or the funding available requests special targeting) it will be important to develop a partnership criteria (see comments on Report 1) in order to facilitate selection of partners.

19. Overall PAED Objectives

The Bat Shop (Durban, Kwa Zulu Natal)

The BAT shop entered the PAED program at its outset in 2001. It is a for-profit enterprise working in Durban, Kwa Zulu Natal. Through its shop it provides marketing and sales of a high quality innovative craft made in South Africa, and marketed goods for 1,100 craft producers from throughout the province. All the craft producers are historically disadvantaged micro-enterprises from rural areas, peri-urban townships and squatter camps, 75% of which are managed by women, many with weak literary and numeric skills. The BAT Shop already provides training in product design with these women and conducts its own product development. The activities of the BAT Shop are funded largely through the profits

earned on craft sales. Prior to entering the PAED program, the BAT Shop had been financially independent for almost five years with an annual budget of \$100,000. Under the PAED program, new products were to be developed and ATA and the BAT Shop were to work together to introduce BAT products into the world marketplace. Through resulting sales and market links the objective was to impact more artisans and create more artisan income.

Overview of results

By the time of the PAED mid-term evaluation of July 2005, the BAT Shop sales had already exceeded the PAED sales goals by 140% (in Mid-Term). Between May 2005 and May 2006⁷, more than half of the BAT Shop sales were international, a third of those sales were to the United States. Gross receipts reached nearly \$700,000, \$400,000 of which went directly to the craft producers; a total of 385 small businesses, each with a bank account and financial records. The gross profit in the financial year March 2005 – Feb 2006 was over \$200,000, double the BAT shop budget when it entered the PAED Program. Through interviews conducted with a number of craft producers during the final evaluation⁸, it is clear that those craft producers supplying the BAT Shop have had marked improvements in the quality of their lives over the past five years as a result of their regular sales to the BAT Shop. The BAT shop have employed two more full time staff members since they joined the PAED Program in 2001, adding to the team a full time accountant and a production manager responsible for processing the orders. The BAT Shop is driven by one strong motivated individual with both business and design sense and a close relationship to the individual craft producers. In the past five years, sales have increased, new markets opened and hundreds of people's lives radically transformed. The partnership with ATA through PAED has played an important part in making this possible. During PAED the value of the Rand has strengthened against the dollar and so have introduced some oscillations in the craft market and its projections on the program. Also true was the impact of oil price increase on the cost of some materials and commodities used in the craft business.

CCDI (Cape Town, Western Cape)

The CCDI institute entered the PAED program in December 2004. It is a non-profit Company and is run out of a warehouse in the old District Six area of Cape Town. CCDI promotes the growth of the craft industry as an economic sector in the Western Cape, providing training in design, business management, production and marketing, and bridging the gap between the maker and the market. It has been established since 2001 starting with 6 enterprises, and when it entered into the partnership with PAED it already serviced 550 craft

⁷ Dates chosen to include income generated by Craft Markets in February

⁸ See interviews with craft producers in Appendix I

enterprises, and had a budget of around \$700,000.00⁹ from a total of eleven funding bodies. The objectives of the CCDI are to support all craft producers in the region and to impact on personal, regional and national growth through job creation and income generation. Under the PAED program, twelve (12) producer groups/enterprises from previously disadvantaged backgrounds were to pass through a program of integrated product development, capacity building and market development in order to improve their product offerings, their capacity to deliver quality products on time and so be more market responsive entrepreneurs with an increased sustainability in enterprise¹⁰. Although one objective of the ultimate resulting sales and market links is to create more artisan income, it is not the only objective and was not specified as such in the program plan. Since the framework for evaluation is not in the PAED matrix, Evaluator used the MOU as much as possible.

MOU and Outcomes:

1. Market – Driven Product Development and Design Workshops: Artisan enterprises identified by CCDI and ATA will participate in design workshops. Members of ATA staff and ATA consultants will work hand in hand with the artisans/artisan enterprises to develop and improve the marketability and quality of their products. Products will be merchandised by ATA’s marketing team prior to participation in any ATA-related marketing activities.
2. Craft Business Training: Training conducted by ATA consultants and staff will be offered in topics such as costing/pricing, production techniques, quality control, packaging, exporting, customer service and craft business management.
3. Market-link: ATA will subsidize exhibit space at local, regional and international Gift Fairs for artisan enterprises who have received design and business training.
4. Institutional Strengthening: Members of CCDI staff will be trained by ATA in overall capacity building.
5. Coordination: CCDI will advise on activities, people and institutions and will coordinate day-to-day activities. A coordinator for the joint activities will be hired subject to approval of the WK Kellogg foundation.
6. Identification: CCDI will assist ATA in identifying artisan producers and assessing their businesses as well as in identifying and assessing South African designers.
7. Monitoring and Evaluation Efforts: CCDI will share its business information, including monthly sales figures and buyer contacts to help ATA monitor and evaluate their interventions. This information will be treated confidentially.

⁹ Figure of R5,287,877.00 for fifteen month expenditure ending 31st March 2005 taken from CCDI 2001-2005 annual report and included in Accompanying Material

¹⁰ Taken from ATA/CCDI Financial and Program Plan of June 2004 in Accompanying Material

8. Information sharing: CCDI will share such relevant information it has, which ATA might need to develop its craft training program in South Africa and measure accomplishments of the project.
9. Fiscal sponsorship: CCDI agrees to serve as the primary contractor with Create SA for 20 participants for 2004 Africa Market Readiness Program, to pay ATA as the sole provider for this training, and pay ATA on receipt of invoice within five days of receipt of payment from Create SA.
10. Protocol: All communication with international funding organizations concerning this programme, in particular USAID, will be routed through ATA, or communicated in conjunction with ATA.
11. Financial Understanding: CCDI and ATA will provide financial support for key activities as outlined in Attachment #1 “ATA/ CCDI Financial and Program Plan” annexed hereto. This support will be a combination of cash and in-kind donations.
12. Fundraising: ATA and CCDI will jointly pursue funding leads and attempt to develop proposals that meet agreed upon objectives.

Overview of results

CCDI management staff was very happy with the MOU, and mentioned that it was flexible enough to let the program grow by itself. By the time of the PAED final evaluation, all twelve craft producers had developed new products with internationally acclaimed NY designer Stephen Burks. The first six of these had been exhibited at international Trade Fairs, and generated a lot of excitement. The products of the second group will have been exhibited by the end of the program. All craft producers involved have their own accounts and financial records. As of yet, many of the designs are still at prototype stages. During SARCDA 2005-2006 sales out of the 12 producers that participated in the Mentoring Program have reached approximately US\$8.762 (2002 – 2006 SARCDA Sales Table) . The CCDI has no direct involvement in either the sales or export of the products of the producers and so a strong infrastructural capacity of the craft producers involved in the program is necessary to benefit from access to market and design provided through PAED. Many of the six craft producers chosen in the first year did not have this capacity. Those interviewed felt they had benefited from the African Market Readiness Program, but still needed support in satisfying the demands of potential customers. As a result of the experiences of these first six, the second group of six craft producers selected already had secure infrastructures with their own experienced managerial staff. The partnership between CCDI and ATA is in its infancy and is still finding the formula for deriving monetary success, however there are many indications that many jobs can be created and enterprises built up, and more importantly artisans can be supported in becoming self sufficient through the unique approach created in this new partnership.

Phumani Paper (Limpopo Province)

Phumani Paper became a partner in the last year of the PAED program in December 2005. It is a non-profit Company and is run out of offices in the University of Johannesburg. Phumani Paper is a socially conscious conservation-led and commercially focused organization committed to making a difference in South African enterprise development¹¹. It has been established since 2001 and when it entered into the partnership with PAED it serviced 175 individual craft producers working out of 17 paper making enterprises around the country. The objectives of Phumani Paper are to support hand-made paper making enterprises in rural communities in South Africa and so generate income through employment in areas with particularly high levels of poverty and unemployment. Under the PAED program, two 'business units' in the Limpopo Province were to be supported in the creation of three market-driven designs each. Two 'in house' Phumani designers would work with Veronica Elgin, a professional American designer living in South Africa, and the new lifestyle products were to be exhibited at SARCD A in August 2006. The two designer trainees are also to be trained in AMRP in August 2006. The craft producers selected were not yet making an income from their work and are largely dependent on government funds and training stipends for their survival and not from the sale of their product. As the nature of Phumani is now shifting from a research based poverty reduction project run out of the university to a commercially run non-profit company, this partnership is designed with a specific view to help craft producers transition to a more market driven practice.

MOU and Outcomes

Obligations of ATASA TRUST

Market driven product development and design

ATASA staff and its design and marketing consultants will work in collaboration with the Producer Group to develop and improve the marketability and quality of its products through providing product development and design assistance. The primary target market for this area of support will be the SARCD A Trade Show and the local tourist market.

Business and market readiness training

ATASA will provide training in the areas of costing and pricing, production techniques, quality control, packaging, buyer relations, customer service and management to ensure price competitiveness and the ability to produce and respond to market and buyer needs. It is recognized that a representative from the Producer Group has previously participated in ATASA's Africa Market Readiness Program training in Johannesburg in August 2005, and some of the knowledge and information outlined above have already been transferred.

¹¹ Taken from the Phumani catalogue which form part of this evaluation in Accompanying Material

Market Link

ATASA Trust works to promote local, regional and/or international market links for products that show market potential. ATASA Trust will promote only those products refined or developed through the product development and design phase and selected as marketable (in terms of design, quality and price and capacity to meet production needs of a formal market link) at ATASA Trust's booth at the August 2006 SARCEA Trade show Exhibition.

2. Obligations of the Producer Group

Honour both this current MOU and the obligations defined by ATASA Trust's designated craft enterprise levels, as well as the development of and commitment to the craft enterprise.

Communicate regularly and punctually with ATASA Trust and buyers, as needed.

Participate in monitoring and evaluation activities implemented by ATASA Trust and/or its consultants that may be necessary during the duration of this MOU. This includes filling in any evaluation forms/questionnaires or participating in any interviews conducted by the evaluators.

Share business or other information with ATASA Trust as needed, including monthly financials, to assist ATASA Trust in the development and implementation of appropriate and relevant training activities and general execution of the project as defined under this MOU.

3. Monitoring

Quarterly monitoring activities by ATASA Trust will include an assessment of the enterprise's current group level (A, B, C, D), as described in the attachment, and this assessment could result in a revision to the enterprise level. It must inform the artisans/craft enterprise within 30 days of any such change.

Overview of results

By the time of the PAED final evaluation, a designer had spent two weeks developing products in the Phumani Workshops and a further two in the Limpopo Province. Three new products had been developed with each of the two business units. These will have been exhibited at SARCEA by the end of PAED. The design trainees are extremely happy with the results of this creative process which have broken the mould of paper products previously produced by any of the units nationwide, largely limited to small gifts such as notebooks, cards and boxes. The new products produced by the craft producers in the Limpopo province have the potential to take paper products into a new market. For the producers this change in approach will only start to make sense once the orders start coming in and their income is affected. The partnership is so new it is too early to judge its success or failure; however it already serves as an example as to how the still young ATASA trust can

partner with local enterprises in specific short, market driven projects. The director and designers of Phumani felt supported by the ATASA staff and have already entered into a further contract to continue the partnership using a similar model with two groups in Kwa Zulu Natal after the completion of the PAED.

20. RSA PAED Outcomes

Assessment of Sales and Criteria

Sales have been one of the drivers of PAED program in order to assess program effectiveness. The sales targets set in the PAED program outline were reached by the South African partner involved in the program from its outset in 2001 (Mid Term Review, 2005). BAT was always close to target or above in relation to sales. The evolution of the late inclusion of two new partners, might have affected positively the overall indicators for number of craft producers to be reached by the program in South Africa, the number of repeat orders and the amount of sales within PAED in South Africa as a whole (but in personnel interview with ATASA RMM) mentioned that indicators were too ambitious and perhaps a few were not reached.

Criteria

To evaluate against sales is difficult and in a not so effective, for the following reasons: 1) Partnership during PAED were difficult to plan in advance, and could significantly affect total sales (positively or negatively), and since other projects were also being implemented by those partners, the effect of total sales cannot be only attributed to PAED; 2) sales is not the only indicator and probably a weak one if an Evaluator wants to assess how much is in fact the real profit for the artisan (important in order to evaluate how the program contributed to alleviate poverty amongst artisans); 3) one can have a big volume of sales but still not make a profit. However, the 3 partners and the RMM all considered the partnerships to have been a success. The model of activities with the Bat Shop suited assessing success by the number of orders, repeat orders and sales generated. Whereas for the other two partnerships assessing against indicators was not possible (see MOUs) and it is more difficult to assess a new design based initiative on sales indicators. On the basis of the figures presented by the BAT shop and the interviews conducted with a small selection of craft producers it can be concluded that the partnership was successful, in improving living conditions and trust in the existing potential outcome of craft activities. With CCDI and Phumani Paper the targets based on sales figures may not be the best way to assess success, as both partners are still in the process of developing the product and so were unable to provide representative sales figures. However qualitative success can be measured on the basis of the interviews carried out during the evaluation.

21. Other Benchmarks

Design: The craft design exudes culture and creativity and SA has grown up on a culture of making things. It is known as the “Rainbow Nation” for its colorful beadwork, textiles and clothing. One of the most tangible impacts of the second phase of the PAED program in South Africa and the two new partnerships formed in Y4 and Y5, is in the influence it has had on the design of the products produced by the craft producers involved in the program. Through the designer visits, the design mentoring program and the presence of the new designs in international trade fairs a new step has been taken in the design level of the product produced which has the potential to take South African craft into the realm of industrial design, furnishing and home appliances and so open a new market. There may be opportunities for product design agencies to assist with the development of “Made in South Africa” products.

Market Access: The other area of notable success throughout the five years of PAED in South Africa was the access the program gave to Southern African Producers to new markets through the trade fairs and through individual contacts of buyers and designers. Presence in SARCD (and space increase) since 2002. Design Indaba Expo, NYIGF and various other exhibits. The activity becomes extra important as an enabling environment for meeting other people and increasing the possibility for comparing quality and price and making contracts.

Training: With continued readjustments of the AMRP managed by ATA’s Regional Representative to suit the needs of the Southern African craft market, the PAED program is in a position to provide training which is custom built for the needs of the small craft producer. The training has demonstrated increased interest in the part of artisans with good comments (AR- 2002/3/4 and 5). However it is recommended to do a detail study on the impact of AMRP on beneficiaries and compare to other trainings available in the SA/African Market. Also some issues about the adequacy of some modules to the beneficiaries’ aims should be revisited. In SA, for improved recognition the AMRP modules need to go through an accreditation process. The future plan of AMRP is to be co-facilitated by accredited South African individuals. Also in the comments, it is important to reflect that participants to the AMRP come from different educational backgrounds, where language, literacy and numeracy are important to take into consideration.

Fund Raising: The establishment of ATASA was slow and has not yet been successful in raising the matching funding that was expected. At issue was the fact that funding organizations in RSA do not accept the existing conditions on how the grant is split between the country and HQ in the US. However, it is anticipated that now, as it is finding its place in the market, the formal representation of ATA in South Africa will facilitate fund raising in the future

22. Development Indicators And Targets

Following the questionnaire structure established prior to the South African Final Evaluation and Organizational Development Indicators and Targets set out in the final evaluation terms of reference, here follows a breakdown of results achieved during the program with the two more established South African partners- The BAT Shop and CCDI. As the partnership with Phumani Paper is less than a year old and has not yet exhibited any designs at any markets or participated in any training modules, the results of that partnership are as yet not possible to assess.

Capacity Building Training Modules and Manual

The BAT Shop

During the PAED program, in addition to regular institutional financial support, BAT Shop staff and craft producers attended the Market Readiness Program in Johannesburg and New York, and an international designer gave design support to The BAT Shop for the first two years of PAED. The three crafters interviewed from the BAT Shop who participated in the Market Readiness Program believed they learned a lot from the experience. In particular all crafters mentioned the attention given to the importance of producing a quality product and in changing your line in order to keep up with the changing market. They found the experience of meeting others working in the same field also interesting. Any use of a manual is not relevant to these crafters, none of whom are literate in English. During the final year of the PAED program, the financial support received from ATA was phased out according to an MOU signed in September 2005. No craft producer from the BAT Shop has participated in the training modules since this time.

CCDI

During the PAED program, craft producers received Market Readiness Program training in Johannesburg and 4 managers and designers were sent to New York. An international designer gave design support to the CCDI mentoring four young designers both years of their partnership with PAED. The three crafters interviewed from the BAT Shop who participated in the Market Readiness Program believed they learned a lot from the experience. In particular all crafters mentioned the attention given to the importance of producing a quality product and in changing your line in order to keep up with the changing market. They found the experience of meeting others working in the same field also interesting. None had used the training manual since the course ended.

Capacity Building: Website

The BAT Shop

The objective of facilitating the website design and use was not achieved during the Program although an electronic catalogue was produced. In interviews with BAT Shop staff it was

considered to be something they would still dearly like to develop and all share a disappointment that this had not been possible within the PAED program.

CCDI

The objective of facilitating the website design and use was not included in the MOU. In interviews with CCDI staff it was considered to be something they would very much like to develop.

Funding and Proposals

The BAT Shop

The BAT Shop has raised finance for other small and large projects during the five years PAED Program, from the Local Government, Kellogg Foundation, The Greater St Lucia Wetland Authority and the French Institute. They intend to continue to raise funds for specific projects and now have been able to sustain their own running costs through the sale of their products.

CCDI

CCDI receives financial support from ten other funding bodies. They intend to continue to raise funds for their own specific projects and coordinate joint fundraising strategies for the PAED related activities in South Africa. They also intend to identify new potential funding sources, develop funding proposals and raise matching funds through Kellogg. They are confident of finding more matching funds in order to continue their relationship with ATA.

Technique Design Capacity Building

The BAT Shop

One French designer worked with The BAT Shop over two years. It was felt that the benefit from this partnership was limited and so from the third year of the PAED program the BAT Shop opted to develop its own products and design without the support of designers provided within the PAED program. It was noted however that the opportunity to work with someone with a more 'cutting edge' approach to design, like the American designer Stephen Burks of Readymade Projects who worked in Cape Town in year four and five of PAED was seen to be an extremely positive idea and would have been welcomed by the design department at The BAT Shop.

CCDI

One American designer worked with The CCDI over two years. The benefit from this partnership was considered extremely positive by both management and design trainees. The

mentorship program is considered a successful way to assist in the growth of new young South African designers.

Bank Accounts & Financial Records

The BAT Shop

All of the producers are treated as a small business and have their own bank account and financial records. The producers buy their raw materials from the BAT Shop and sell each product at a fixed price. All producers interviewed were able to explain the economy of their work, the costs of each product in wire and the amount they received for the product how much each product costs in the shop even if they were not literate and had limited numeric skills.

CCDI

All of the craft producers have their own small business with their own bank account and financial records.

Business Knowledge

The BAT Shop

The three craft producers who participated in the course and the final evaluation interview gave indications that their business knowledge was improved as a result of the Market Readiness Program. The main benefit of the new knowledge seemed to be the increased understanding in the work being done by the BAT Shop administration, and so the reason for the large difference between the retail price and the amount they receive. Asked if, given the opportunity, finance and training, they would prefer to run their own business, all crafters interviewed said they would prefer to stay with the BAT shop, because they realized the amount of work and responsibility required in administration of marketing craft products.

CCDI

The three craft producers who participated in the course and the final evaluation interview gave indications that their business knowledge was improved as a result of the Market Readiness Program. One is now handling the export of her business, one has set up a new business specializing in craft exhibition as a result of the training and one has rented himself business premises in order to attract new clients. He was given the confidence to do this as a result of the PAED program.

South African/Regional Designers

The BAT Shop

The visiting designer who participated in the PAED Program with the BAT Shop from France, was not as successful as the NY designer working with CCDI this could be because other design work within the BAT Shop was conducted by their own staff, two of whom are themselves trained designers with great success (e.g. Zen-Zulu designs) the additional visit from local designer Richard Sparks was also not seem to have contributed greatly to the product range of the BAT Shop.

CCDI

The main visiting designer who participated in the PAED Program with the CCDI was from The United States; a second designer, Simon Curtis came from South Africa. These designers worked alongside four trainee designers during the first year of the program, two for part of the second year and then one who completed the work in the lead-up to the Trade Fairs in 2006. The one remaining trainee designer interviewed considered this mentorship program extremely useful and learned a great deal from working alongside the American designer. CCDI management also considered the visits of the NY designer particularly successful in opening new horizons within the South African craft industry.

Service Delivery: Access to Local and International Markets

The BAT Shop

The products of all Craft Producers are now marketed nationally and internationally.

CCDI

The products of three of the six Craft Producers who participated in Year Four of PAED with the CCDI are now marketed nationally and internationally.

Service Delivery: Annual Sales at the Local Fair

The BAT Shop

At the last SARCDA in 2005 the BAT Shop Sales reached nearly US\$16.000,00 evolving to US\$28.000,00 in 2006 (figures given in ATA SARCDA sales do not match figures given by the BAT Shop Accountant during the assessment)

CCDI

At the last SARCDA in August 2005 the CCDI sales were \$4,295.00, most of those from Willard Musarurwa's wire tables. These received a further \$500.00 in follow up orders and followed by a further \$4,000.00 of sales at the Design Indaba in Cape Town.

Service Delivery: Cumulative Sales

The BAT Shop

Between May 2005 and May 2006¹² the gross income of the BAT Shop was \$677,500.00¹³. In the financial year March 2005 to Feb 2006 the Gross Profit was \$216,666.00¹⁴

CCDI

Few Direct sales have yet been made of the products developed through PAED. One product from the first group has the interest of international buyer from Artecnic, who would like exclusive distribution rights. The same buyer has asked to see the final product of some of the creations of the second group. The CCDI management is concerned that the new designs may be too expensive for the American market but are confident in their success in the European and domestic market.

Service Delivery: Number of Artisans Served

The BAT Shop

In the accounting system there is 385 crafters are currently registered with the BAT Shop receiving a weekly income based on sales, however, as these make up small businesses which sometimes deliver products from family members or neighbors. It is estimated by BAT that the total number of artisans indirectly affected is on the order of 1.100 in total. In the future it would be interesting to clarify how the project can demonstrate the tracking of those artisans "indirectly affected".

¹² Dates selected to reflect impact of SARCDA on follow up sales, which come in months following the Fair

¹³ Figure was obtained from Bat Shop accountant during the field assessment in Durban

¹⁴ Exchange rate calculated at 6:1 for exact figures in SA Rand see BAT Shop income breakdown in Appendix VI

CCDI

12 craft enterprises were served by the PAED program; however, as these are small businesses it is possible that if one of the new lines is successful many more craft producers will be employed in the production of the new lines (refer to interviews).

Service Delivery: Importer visits

The BAT Shop

In total in all years actual numbers of buyers visits to RSA were above target. It was very impressive the number of visitor in total numbers (87) always increasing every year.

CCDI

Two importers visited in both years of the program. Although they did not purchase any of the new ranges developed through PAED, new relationships were developed with two of the producers who are now supplying the San Diego Zoo with other products from their range.

Sustainability: New Product Lines Accepted in International Markets

The BAT Shop

It was not possible to distinguish between new and old product lines during the course of the visit. But from the buyer's survey, there was a feeling that quality control, colors and packaging were very good. There was great product variety and innovation. With some criticism about the increasing price trend "The Bat shop products are becoming overpriced" (buyers survey interview). The cost of materials has been increasing and so many of the other production costs with the increase on oil prices. It was mentioned that ATA opens up the world to small businesses.

CCDI

Five of the twelve new designs have received a large amount of interest. As the prototypes needed refining, the contracts were not yet signed at the time of writing the final evaluation although they may be signed by the end of the PAED Program. The wire tables produced by Willard Musarurwa received nearly \$4,000.00 worth of orders at SARCD A in 2005 and a further \$1,500.00 in follow up orders. The marketing of this product suffered with the death of Willard's exporter Shahida Hendricks. The product with the design alterations made to the product by Italian buyer Artecnic a to facilitate packaging is not being marketed, but rather as an exclusivity deal with Artecnic a. Writer has learned that this deal was finalized as of August.

Sustainability: Number of Wholesale Buyers who Re order within 9 months

The BAT Shop

The Bat Shop Market to Wholesalers is very small, only R64, 000.00 or the R4, 000,000.00 turnover is to retail. However there is a record of wholesale reorders. 5 of 12 in Africa, 24 of the 86 buyers reordered in the USA, 15 of 26 in Europe and 8 of the other 21 buyers around the world reordered. The interviews from buyers reveal a great interest to continue business with the Bat Shop. As was said in one interview about intention to reorder “Yes, I keep re-ordering products that sell” or in another one “yes definitely”.

CCDI

The wire tables produced by Willard Musarurwa were the only product so far developed through PAED to have been re-ordered. A first order was placed with a value of a little over a thousand dollars and since another thousand dollars worth of orders have been received from the same wholesaler.

Recommendation: It would be interesting to follow up on some of the suggestions made by buyers (see Buyers interview in Report 1). Most are very interested to continue buying products available in the South African Market, which indicate that product is on average good value for money One buyer mention “...good quality products, professional artisans”. However from buyers survey Evaluator believes that ATASA still plays an important role in establishing the contact between the buyer and the South African Market as one buyer said “ATA provides a level of trust/legitimacy that one might not otherwise have in the artisan enterprises” or another client said “ATA office in the country of origin is a BIG plus for buyers to be able to meet and get a solid perspective on the country they are visiting”, there was a case where a buyer suggested to have been assisted very professionally by a South African vendor. To improve sales some of the identified weaknesses need to be addressed like:

- 1) how RSA sales deal with US buyers (presently not enough time dedicated), and “...lack of training to deal with buyers, with lack of basics already in place...”;
- 2) weak marketing of new products;
- 3) Improve strategy to cope with high demand seasons;
- 4) weak network of established SA vendors.

23. Introduction

The PAED 2001-2006 program was designed to improve and expand the services delivered during the first matching grant program (RISE). From RISE, ATA had clear insights into both the opportunities and constraints of the craft industry in Southern Africa. The Program designed to be implemented in Mozambique, South Africa and Tanzania had different intervention strategies according to needs and challenges of each country craft sector. PAED program was designed to benefit from the continent's most developed economy found in South Africa. The Pan-African market link was specifically designed to ensure that this market became accessible to African artisans thus expanding their market opportunities. A crucial component of the capacity building initiative, in addition to business skill workshops and the Pan-African market link, was the AMRP meant to provide intensive training in a regional context with a South African market focus.

The Mozambican craft sector was and still is a highly unorganized sector, lacking government development policy. Lack of institutional support and infrastructure is evident in all aspects from producer to marketing and sales. The absence of any clear legal framework for Craft Industry development is patent, and data on the sector is inexistent in the country census. Most activities on the sector happen on an ad-hoc fashion, and most transactions are done on an informal way, which make it even more difficult to assess. As a result of encountered sector weaknesses at all levels, ATA decided to establish an in-country office based in Maputo since 1998 (under RISE). The Mozambique country office, besides offering space for administrative normal functions, serves as a focal point for the craft sector and acts as a voice for the artisans and exporters in government and media forums. In order to increase PAED outreach nationally, sub-offices were created in Sofala and Nampula and strategic partnerships established in Manica and Inhambane, during PAED implementation.

A recent study¹⁵ point out that forest products are the major source of raw materials in the craft sector. Most crafts are based on wood carving of 4 precious species and 3 major fruit trees¹⁶. The precious wood species are under a management protection status but craft activities do not pose a pressure due to relatively low demand. However, there are some concerns that some species are being over-exploited; some harvested wood does not come

¹⁵ Egas, A and Nilza Puná, 2006. Artesanato de Produtos Florestais em Moçambique. MINAG/DNFFB

¹⁶ Oriole Report, unpublished, 2006- Artesanato de Madeira: Potencial, Maneio dos Recursos Naturais Existentes e Uso Sustentavel

included in the statistics, and some traditional practices (fires and agriculture) may also contribute in the reduction of the wood bank in the country.

As mentioned there is very weak support to the craft sector, and clear strategies to reach the artisans at government level do not exist. Access to funding is difficult, and ATA is most of the times a single player in formalized support to the sector.

24. PAED Objectives for Mozambique:

- 1- Strengthen organization of artisan and export sectors and address key weaknesses;
- 2- Provide artisans with business development services;
- 3- Increase the fundraising and financial management responsibility of local staff;
- 4- Develop and expand marketing and sales opportunities for Mozambican artisans leading to revenue generation;
- 5- Scale up and expand the impact of ATA's work in Mozambique;
- 6- Craft entrepreneurs continue to reach and expand markets after PAED project ends;
- 7- Artisans able to develop quality products for international export independent of ATA;

25. Evaluation Methodology

The Terms of Reference (TOR) were intensely discussed between the Evaluator and the Head Office and on the 16th of May we reached a conclusion and agreed in the Final TOR (see [Annex 1.1](#)). Most of this Evaluation Report on Mozambique is based on an analysis of Questionnaires (ATA Staff in Mozambique, Partners, Artisans); since the final ATA Annual Report 2006 (Final Report) was not done at the moment we carried out this final evaluation. Because the objective of the survey had two major goals: 1) to assess the major indicators of success in PAED and 2) to assess to what degree PAED had made a difference in their target group (Beneficiaries) in relation to Non-Beneficiaries (Control Group), the Evaluator in co-ordination with ATA staff agreed on a set of questions ([Annex 3.1 – Mozambique Artisan Questionnaire](#)). Each artisan interview lasted an average of 45 minutes, while the meetings with staff were around 3 hours long (held collectively at the Consultant's office. See [Annex 3.3 - Mozambique ATA Staff Interview Summary](#)), the meetings with sales and other stakeholders were held more informally and lasted no longer than 15 to 20 minutes with each.

The field survey consisted on 85 Interviews in the Provinces of Maputo, Nampula and Cabo Delgado (10 more than recommended in TOR). After validation of questionnaires for statistical analysis purposes, we end up with a sample of 23 PAED Beneficiaries (B) and 48 Non-Beneficiaries (NB) (71 Artisan interviews, short of 4 interviews). We originally planned 75 Questionnaires to Artisans organized in the following way: a) in the Provinces of Maputo (15 Artisans from July 10 to 20), Nampula (30 artisans from July 5 to 16) and Cabo Delgado (30 artisans from July 12 to 18). We believe that the quality of data of the validated questionnaires is very good (Annex 3.4 – Field Work Report Summary – Enumerators Report, Mozambique and with Standard Deviations bellow 6 which is good for social studies) in most cases and unless specified (as there were cases where the missing data is high) conclusions can be backed up by the data. We purposefully avoided questions related to numbers and income values, since the baseline indicated very weak data on the matter. The data was analyzed in statistical software (SPSS10) and all data is tabled in an Excel File in order to make it accessible to ATA. We interviewed ATA management staff in the Mozambican office. We also interviewed some important stakeholders like “Cantinho dos Artesaos” (manager) and “Maciene Association” (Technical supervisor), “Artes Mondlane” (owner) and “PRODAZ” (manager), mainly doing local sales and exporting, and “Comercio Justo” (founder and manager) doing artisan support and trade fair organization, and “Escola de Artes Visuais” (director) a public training school in Maputo (see Annex 3.2 - Summary of Mozambique Stakeholders Opinions).

For the identification of targeted Artisans Evaluator (E) received a list of all PAED Direct Beneficiaries (B) and a list of NB that were targeted before during the Baseline Study before the Inception of RISE. In general the Evaluator created a new list for NB as most on the ATA list were difficult to locate. At times it was also difficult to locate some B. (e.g. in Nampula it was difficult to find the Beneficiaries we intended to initially interview as they moved. Due to financial constraints it was not planned to travel outside of the fringe areas where some of the B were located). This affected the final balance between Beneficiaries and Non-Beneficiaries, although it is an estimate that NB are a larger majority of artisans in this country, (it is very difficult to get an accurate figure what the craft population is in each province). While in Nampula and Maputo we found no problems of questionnaire understanding and comprehension, in Cabo Delgado there was a need to spend more time in explaining the questions, more problems with language (use of interpreter at times) and the artisans were reluctant to respond (there was a recent survey, and most artisans interviewed do not see much support coming from the surveys, furthermore the major request from the artisan was to get some form of feed-back, under Enumerator’s report). For our field surveys the evaluator is thankful to Ms. Lesley and the Nampula ATA representative for their support in organizing the meetings and logistic for our field assistants. In Maputo, we also had the needed collaboration from the staff, although it was a bit difficult to find the right atmosphere to carry out a more participatory evaluation, as most staff were finishing up last minute PAED activities or leaving for vacations. The evaluator recognizes the difficulties in doing a Post-Mortem evaluation (which in some ways could be convenient) as project personnel might no longer be available. But suggests that for the future: 1) the evaluation fall out of the staff vacation window (July-September) and 2) PAED Annual and

Final report be ready before the Evaluation takes place. The evaluator also recognizes the weaknesses present in this evaluation, mainly due to: 1) not being able to visit and interview artisans in a more representative regional basis and not deep enough to investigate the dynamics inside the artisan's micro-enterprises (due to financial constraints); 2) not being able to carry a more participatory discussion of identified issues and 3) not being able to interview directly an important group of the PAED stakeholders (as mentioned above, most USA stakeholders were handled separately and a interview report sent to the Evaluator).

26. Evaluation

General Trends in Partnership Building and Overall Goals

Partnership approach is very valuable in brokering cross-sectoral links, creating new opportunities and being able to leverage additional support. These relationships do not build on a short time perspective. It is very important to create such regional partnership forums to include public, private and NGO institutions in order also to leverage the so needed additional support

It is apparent that PAED is the main motor for what is happening in the Mozambican Craft Sector. Major important achievements of PAED are the demonstration that craft is a feasible business, craft production can become an important and respected economic activity, and slowly positioning Mozambique on the map as an important stakeholder in the international craft business. With other strengthened institutions more work needs to be done at policy level, in such a way that more institutional recognition and support can be achieved

Direct Beneficiaries of PAED stand out (in many issues including Better Standards of Living) clearly from those artisans that were not supported directly (refer to Section about questionnaire analysis, below). It almost goes without saying if one had the opportunity to visit the B workshops and homes and compare to other artisans it is clear that the impact of PAED is not felt only in the improved artisan professional abilities but as well affected positively the living standards of their households.

If an overall criticism exists it is one related to the limited temporal scale of PAED implementation to deliver the Overall Goals and in most cases weak outcome to promote the creation and consolidation of Craft Organizations in Mozambique (in order to guarantee their sustainability).

ATA is a lone player in the craft sector in Mozambique (refer to response in Q29 and interview summaries with Mozambican main stakeholders). As we found in our analysis, no other organization public or private does the same type of support as ATA. As such this reflected as a challenge. The need to grow and expand was evident during the implementation phases (either because of match requirements to do more activities or either to respond to developmental dynamics, like the creation of Wood Bank, and opening regional representations in the Provinces). Partnering was a great challenge during PAED as ATA had difficulties to find an interactive craft environment. Only more recently new organizations were being formed with increased support from ATA to the sector (interview with exporters and Comercio Justo). Slowly several partnerships are being strengthened while others did unfortunately not work as intended (e.g. ANARTE creation see Mid-term and AR 2004 for more info), but the Evaluator is aware that an artisan group is trying to give life to ANARTE, which may indicate that certain outcomes need time to coalesce. ATA-MOZ managed to establish important partnerships with National Museum of Arts, Comercio Justo, UNESCO, IPEX, PODE, ADEM, and Escola de Artes Visuais. Important partnerships were recently established, like ADEM in Manica, or private sector partnering in Inhambane, or even opening temporary regional offices in Sofala and Nampula, that may bring an opportunity to expand the impact of ATA's work in Mozambique). Escola de Artes Visuais is thankful for ATA support to the school curriculum, and most of all to the bridge between theory and practice, by exposing students and young professionals to the Arts & Crafts industry (e.g. promotion of contests, mentoring young professionals, etc). Important synergies can coalesce out of this collaboration.

These partnerships were important to: a) build the ability to address more efficiently the needs of the craft sector; b) build artisans business skills, production management and quality control and c) to build the export business for project sustainability. The Evaluator assessment to the aimed partnership goals varies. Most success goes to item b) and major failure to goal c). It is clear that goal a) gets a mixed assessment (due to time constraints of PAED), if on one side the support to the Beneficiary group was very important and in fact contributed to improve their and their families living standards, on the other side it was short in one way, as it did not reach enough artisans and so was most questionable in terms of efficiency (see Table 19). It was assumed under PAED that the distribution of the Bulletin "As Mãos Falam" would be a strategy to reach approximately 3000 artisans (indirect Beneficiaries). Although for those that received the bulletin they mentioned to be a good source of information for their craft business. However, the same analysis indicates a very weak outreach, as distribution was neither regular nor guaranteed. The evaluator confirmed with M&E officer that no mechanism of tracking was used for the distribution of the Bulletin. (Refer to page 8 of AR2005 Matrix indicators Moz)

At instances when talking to artisans and sales people, they seem to indicate a feeling of ATA not willing to promote for a direct contact to the client, and so the artisans felt a bit worried on how to reach the clients (if and when ATA leaves as ATA is seen by artisans as their major client). On the other side ATA staff feels that at issue is the degree of quality of

the final product that needs to be scrutinized by ATA, since capacity is still weak. (Reader should refer to [Entrepreneurship and Sector Focus](#) to understand the complexity at issue)

Capacity building

In Mozambique PAED focused in: 1) reinforcement of the office and staff capacity to respond to craft sector challenges; 2) for increased sustainability strengthen export businesses and 3) direct and indirect support to build artisan business skills (e.g. production management and quality control, creation and strengthening of micro-enterprises). There is no quick wins in order to bring knowledge up to the level of the needs. The office management staff had no remarks about any additional skills needed to perform their routine work, but some mentioned that they could not find the time to sometimes benefit from training, the and so item 1 was achieved. Regarding item 2, the effort dedicated by ATA was very high but the outcome was short of intended results (mentioned in detail elsewhere). With very low-level educational background, most craft producers will continue to be less educated unless they have access to training and development of higher-level skills. To achieve best and sustainable results, training is imperative. This will provide the development of the social capital, and that is only possible if it addresses the development of the person as a whole, addressing all capacities. Item 3 was mostly very successful in all PAED directed support to the artisans, may be only short in terms of the indirect support and especially in the weak ratio of legalized micro-enterprises (only with 15% of those SMEs with an MOU are legalized by end of PAED).

Having in mind the different important groups of the sector - producers, agents, “middle person”, retailers, exporters and designers ATA had two specific Programs: EXPORT Mentoring Program (EMP) and the PRODUCE Mentoring Program (PMP) dedicated to Mozambique. It might be still early to assess its sustainability but it is apparent that the number of involved stakeholders is short as 3 (of the expected 4 by EOP) local Exporters trained but at this stage is crucial to know if those selected will be capable to handle orders independently. The E takes note from comments at staff and Africa Director interviews saying that 1 or probably even 2 of the trained Exporters will not pass ATA criteria. It will be important to register what was the final status regarding ATA’s “List of recommended Mozambican Craft Exporters”.

Regarding PMP (2 artisans and 1 staff member went to El Salvador and Honduras and were exposed to production management, packing and shipping). The E wants to stress that interviewed artisans give preference for local or regional exchange programs where artisans can visit each-other (probably even speak the same language) and have a hands on training session. This may be more efficient and possibly reach far more artisans.

PAED regional workshops (South, Center and North) have been an efficient (reaching more artisans for a lower cost) way to share and acquire knowledge. The contents are being

expanded and adjusted to local needs, and more recently important issues like hygiene and safety at work have been addressed. Another type of support has been the Product Development (PD). ATA is very unique in this respect and brings what is most needed in Mozambican products – innovative product lines that are functional and can be originated from a diverse source, contributing to sustainability (e.g. use of softwood, recycled paper, fabrics and basketry). Mozambique comparative advantage is very much based on the wood carving of precious wood. The E believes that crafting is an attractive way to increase value added to natural resources. Working with the Forestry Department and Research Institute in order to promote more sustainable practices for forestry management is important, if not only to guarantee a right reserve for the craft industry in the future.

Market Readiness Program (MRP) an ATA developed training program has been adapted to Africa (African MRP). In total 49 Mozambicans have been trained through the Program (of which 22 in the AMRP). It is patented (AR-2005) that most participants were happy with the training (most scores are above 4.5 out of 5), and since there is no other such training in the country it is also worth to assess what the future of these training programs will be handled in the future. So far no Mozambican is selected to co-facilitate the AMRP, and it seems that ATA SA Trust will be responsible to facilitate the training. If training is such an important aspect of PAED in Mozambique than it would make all the sense that some of the 9 trainers of trainers would be selected to be furthered mentored into the ATA culture and give follow up to AMRP.

So far no detailed study was made to assess the degree of success of the AMRP training, this is especially important since ATA has struggled with how to measure training effectiveness, and the existing tools (pre and post test) were discontinued. May be focus the evaluation of the AMRP into what happen according to the “Bold Steps” (new evaluation strategy introduced after discontinuing pre and post tests, where each participant identify a key learning that will be taken upon return to their business and whether or not expectations were met) committed by each participant at the end of training.

RECCOMENDATION: ATA-Moz needs to set up a Service Provider Register. It is necessary to evaluate who is your neighbor next door with expertise in craft development, technical skills training, design & product development and business development and mentoring. The Register provides an important accessible resource base to draw on for quotes, EOIs, and most of all it promotes even more local expertise and facilitates selection of the best providers. Working with many providers broadens the scope of activities – a very creative way to work – and brings more opinions and voices into the process.

Entrepreneurship and Sector Focus

ATA is operating in a business environment and economic sector, so most support must have a business approach in order to encourage a business response from clients. The craft

sector is not just a by-product of cultural activity, nor just products produced to add value to the tourism industry. The craft sector is an economic sector that has fairly complex production and supply value chains with a range of players involved at each stage. Artisans most often are put under pressure in order to perform in all aspects from manufacturing to sales. It is only on rare occasions that one finds all these functions in one person. For a sustainable craft enterprise we either have to consider engaging with people who provide these services or either commission the service. Only recently some organizations or individuals are venturing in a few of those services.

The focus of the programme has to continue on the artisans themselves but in order to support income generation and job creation, ATA has to engage actively with the whole sector – producers, agents, “middle person”, retailers, exporters and designers. This high diversity of the craft community has posed (and will continue to pose) a particular challenge to ATA activities – as seen in the field, some crafters barely make their daily subsistence living while others work with good equipped studios producing high-value items; some are illiterate while others have never even been to high-school. Artisans in Nampula are different from those in Sofala and both are different from those in Maputo, due to their different cultures and impact to different business opportunities (in Moz staff interview). So each group may want different things or the same things in a different format, and the programme needs the sensitivity and flexibility to respond. . ATA has done well in terms of the producer sector; most beneficiaries have excelled in almost every possible issue we had the chance to evaluate (73 different issues assessed in the field). Still in quality control ATA staff believes that continued support is needed.

An important aspect for business development is where the Micro companies stand into the legalization process. Legalized enterprises are an advantage for their associates, but the majority of craft enterprises operate on an informal basis, since artisans assume that by legalizing the business they will be subject to taxes, which in reality is the reverse (exempt to pay VAT, access to a formal social security system, open a bank account and so demonstrate transparency and credibility and apply to loans). 10 (15%) out of the 69 supported craft enterprises were legally registered up to 2005. However 83% of B have a bank account, which demonstrate capacity for savings from craft activities, and high potential to do so individually. As mentioned before, the evaluator did not assess any micro-enterprise dynamics, like how associates/labor get paid inside their groups, how they get access to training and resources, etc. It would be interesting in the future to analyze how programs like PAED really affect the dynamics at enterprise and household level. If one aspect is technical capacity of the enterprises, another not less important is the capacity to change culture and social habits of human beings. As seen in the field survey most artisans have been doing business as a traditional way of life, these values will be more difficult to change, and if so is possible, it will definitely take its time. Issues like responding to deadlines and following certain production patterns (required by the client) and control of the quality will be a slow process to be integrated in the traditional human behavior of the Mozambican craft artisan (interview with staff).

It is difficult to expect that one person can do it all in a professional craft business. In Mozambique craft enterprise developmental stage is in the embryonic phase – still very much developing from being a household unit into a unit with regularly paid employees. And so we often see the main artisan to also be the manager (which is possible but as workloads increase the model does not work, that is probably one reason why big orders are difficult to deliver). It would be important to start identifying those successful micro-enterprises in order to promote targeted support and use them as models. An exchange visit program can be then promoted.

Identifying competent exporters continues to be challenging as the “the cost of exporting craft is perceived to outweigh the benefit”. A recent report (see AR – 2005, page 27) on 12 exporting companies indicate the following constraints: 1) export process too bureaucratic; 2) lack of reliable artisans (e.g. poor production management skills and low product quality); 3) financial constraints (availability of 50% for advance pay, and delay on final pay) for which the present micro enterprises cannot respond adequately without external assistance and the exporter is not prepared to cover or negotiate with importer; and 4) packaging cost are high. Mozambique is probably trapped into a scale problem: for justifiable export profits volumes need to be sizable, but large orders there is a production management challenge in terms of responding adequately to product quality and agreed deadlines.

Customer service is a difficult cornerstone to overcome locally because it is also a question of culture (and one critical point raised by some buyers). Due to limited capacity to produce, and the demand for products from different groups, it is often necessary to consolidate a large order farmed out to various groups. Differing work ethics and circumstances often led to one group delivering on time while the other delayed and this may obviously result in a late shipment. This aspect represents a tremendous challenge technically and financially, which may preclude many Mozambican exporters from the market.

ATA had to play the exporter or direct link to the producers for longer than expected, and this brought a mixed bag of problems and created dependency that will be painful to transform yet entirely feasible. Overall the situation become very comfortable for all involved, the artisans felt that they could trust ATA as they were a foreign organization, the exporters only were responsible for a small amount of the exporters’ work and ATA did most of the time the consuming day to day work to ensure order fulfillment, and the buyers, knowing ATA or the fact that they have been around for so long created an almost instantaneous trust in the business relationship.

Despite this added layer of dependency created there is nonetheless the need for a middle person who plays a critical role in promoting craft and ensuring continued orders for the producers. Many clients put forward 50% of the funds when putting an order (this is what

ATA is promoting) but there are other clients that don't pay anything. This is a constraint for the local exporters, without much access to capital. There is also the problem with artisan side, since they always need an advance (usually 50% of the ex-factory price) for initial costs of production and daily survival. ATA many times came forward with program moneys to cover for that in the short term but the exporters who will pick up the ATA role from here in terms of direct linkages to buyers will not have easier access to money and that could cause a strain in producer/exporter relations. PAED have about a 63% buyers satisfaction in Mozambique. ATA is doing a lot of work to change this cultural trend. ATA is probably working alone here, and some of the good results either in improving delivery commitments and design and product quality need to be recognized both in Mozambique and RSA. This is an important aspect for ATA reputation.

PAED created the link between a South African buyer and Mozambican producers, and although this resulted in this buyer being the main importer of Mozambican products, ATA is not aware if his approach regarding fair trade with Mozambican artisans is maintained, but feels to be a sensitive issue. Also the exporter program was not producing desired results, and ATA feels that it still needs an intense mentorship based on a one to one attention; the question of ethics needs also to be addressed as many would just reproduce copyrighted items without permission and sell them in the market. In general ATA needs to remove itself from the value chain, which proved very difficult to do in Mozambique.

Fair Trade

It is difficult to access how fairly artisans are being treated. Fair trade only takes place when artisans know how to cost and price their products and when they understand the retail value chain. Mozambican craft and crafters still have a long way to go in terms of determining a fair price for their products (see AR – 2005, page 21). It's only recently with ATA support to productions tools to artisans that craft articles can be produced in series (in a more industrial way) rather than single handed. This will probably open a great opportunity for Mozambican crafts to be able to compete in the regional (SADC) and international markets. In parallel, there needs to be a regulatory framework of trade activity through an industry charter or accreditation system that defines best practice, which in Mozambique does not exist but is important to promote. The export market is becoming more specialized and attention to sustainable practices will be more the norm than the exception.

It is difficult to evaluate how different artisans (disadvantageous poor and the emergent, the rural and the urban) assessed PAED support and even if the Program had any special strategy to targeted disadvantaged groups. One clear group that stands out to be excluded is women, since most support goes to wood carvers (who are generally men). By not having a special strategy to reach disadvantageous groups, PAED may be creating an elite group and increasing the already existing socio-economical differences in society.

Is it realistic to think that it is already possible to cut out the middle person from the process? In Mozambique where clear rules to know how the system works are nonexistent, the intermediary is an important part of the process. Producers are vulnerable to exploitation because of power imbalances in the sector. CB is the only response to level the playing field; continue the training and broaden the target group basis.

Charging for services is a barrier to development and at times excludes the very target PAED aimed to reach. User's contribution towards the cost of a rendered service builds commitment, responsibility and appreciation for the effort being done. ATA has built on that spirit, although they have not reached most of the targets in terms of recovering costs for services provided; which is ok if we are able to develop the sense of responsibility. Again the right amount of the user's contribution must be set up according to existing criteria and in such a way that it does not exclude the disadvantaged but does not promote the "run for a free lunch" spirit which usually only promotes the most already advantaged groups. Criteria instill discipline in the selection process ensuring fairness and independence. Criteria are not there to exclude but to ensure the right match of enterprise to opportunity. This will build institutional reputation as well. In any event, it is hard to decide who should participate and who should not. ATA has taken this responsibility most often. After a while there is a need to shift the responsibility of decision-making to the craft enterprise itself. In this case ATA is the provider of the opportunity (e.g. Fair, workshop, training, etc) and all the information about what the enterprise is likely to gain from the event. The entrepreneur must choose whether or not to participate, and in so doing will take the responsibility of his act. In Mozambique ATA has been slow in increasing the number of reached craft enterprises. One of the reasons for the weak performance in this topic may be that ATA was not very clear of what to do and not to do. They got too involved in craft producers businesses and did the trade themselves, which can be comprehensible to a certain level, but by doing that, ATA has at the same time limited the intervention of other potential stakeholders. The sustainable approach would be to work directly with the intention to resolve the constraints identified by the export study (see comments above). At least by the end of PAED, ATA's right place should have been the Facilitator, the catalyst promoter of opportunities and brokering relationships and connections – creating an enabling export environment for what should have been done by the entrepreneur – making and selling craft. One question remains: if exporting craft could become a lucrative business for local businesses in Mozambique why then we don't see more successful people around? The analysis above can identify at least some of the major constraints.

Access to Craft Opportunities

Trade Promotion is another important aspect of PAED. Mozambique craft business and trading takes place mostly through informal systems. Not many (if at all) formal local craft fairs exist in Mozambique. PAED promoted "as Mãos" National Holiday Craft Fair and with other organizations promoted the artisans participation in other fairs in Mozambique.

This type of initiative “As Mãos” should be encouraged to take place in other Mozambican regions. Fairs can be a great strategy to increase sales (major constraint identified by the artisans) and at the same time capacitate the artisan (planning, interact directly with clients without the “middle person”, compare prices and scrutinize customer demands). Promoting Fairs in major tourist attractions may create the necessary synergy needed to boost sales (e.g., Inhambane, Pemba, Reserves and National Parks are also opportunities). ATA initiated contacts with the Municipality in order to create a permanent “Craft Village”, to the time of the evaluation no place has been officially authorized for its location, and apparently may seem a complex outcome to achieve in the future.

27. The Craft Sector and Impact of PAED in Mozambique

B- Beneficiary of PAED; NB- Non-Beneficiary of PAED

Because it was important in the evaluation to make sure that two artisan groups could be identified, those supported directly by PAED and those that were not supported, we did 2 kinds of certification. In the ATA office we coded those that were directly supported from those that were not. In the field we also asked in Question 27 (Q27) if the artisan was or was not an ATA beneficiary (e.g. whether they had an MOU). The tables and figures are organized in such a way that a comparison can be made between these two groups (Beneficiaries of PAED and Non-Beneficiaries of PAED). We registered the frequency of responses and when needed run significance testing (Chi-Square for frequency testing is indicated to test if the frequency obtained in one response is statistically different). Some tables do not add up to 100% due to either no response from some artisans or in some cases the response registered does not fit the criteria of the class. We tried to avoid elusive questions, where the respondent has dedicated alternatives to respond in order not to force the responses. On the other hand this method may have opened space to misinterpretation. The evaluator wants also to stress that it was easier for the Beneficiaries to answer the questions than to Non-Beneficiaries.

Mozambican Craft Sector – Artisans in General (Q 1 to Q 6):

Most ATA beneficiaries (70%) are in the age class of 29 and 45 years old while 79% of non-beneficiaries (NB) are between 18 and 45 years of age. The craft sector seems to be dominated by males (only one interviewed person was a female). In general they can communicate in Portuguese (above 88% said so). The literacy level seems to be better for the ATA beneficiaries (100% literacy and numeracy) than for non-beneficiaries (83% can read Portuguese and 85% are numerate). The questionnaire was primarily carried out in Portuguese with infrequent need to use a translator (only 8% of NB). ATA B are more educated than NB; where 96% had passed the 4th standard and 44% had more than 6th standard. On the other hand, 25% of NB had less than the 4th standard and only 38% had more than 6th standard. It is apparent from this survey that the Beneficiary group on average are more educated than the Non-Beneficiary. We cannot conclude however any causal relationship with PAED, although we know that some artisans were encouraged to

continue into the formal education by PAED. (For more detail see Tables 2 to 6 in the Annex.)

In terms of Household (HH) size (number of members), [Table 7 – Household Size](#), shows that both groups have more family members on the 6 to 10 members class which may indicate that income potential is still maximized by increased number of members. Or in summary we may say that the number of members is still an HH strategy to increase income opportunities as more hands are available. Table 8 – Number of Members Producing Craft, shows that the majority of both groups still have only one member working as an artisan, but with a clear tendency to allocate more family members in the business, which may indicate a clear advantage between the craft business and other available socio-economic activities.

Table 7 – Household Size

Household Class	% Beneficiaries	% Non-Beneficiaries
1 to 5 members	26.1	39.6
6 to 10 members	65.2	50.0
More than 10	8.7	10.4
Total	100	100

[Table 8 – Household Members Producing Craft](#), also shows a tendency of the B group to allocate more family units in the business (56%) than the NB group (38%). This may show that there are more open opportunities to maximize employment (and income) in the beneficiary group. This trend clearly relates to data (see Table on Q10) about the time the household dedicates to other socio-economic activities, besides craft. More than 62% of the artisans said that they did not have other time-consuming activity (and so the Craft Business was their main cash activity). While 30% of the B and 38% of the NB said they had other time-consuming activity. For both interviewed groups the craft business was their main cash and socio-economic activity.

Table 8: Household Members Producing Craft

Number of Members	Beneficiaries	Non-Beneficiaries
	%	%
1 member	43.5	62.5
2 members	39.1	16.7
More than 2 members	17.3	21.0
Total	100	100

We were also interested in evaluating the number of hours dedicated to craft (Q13). From Figure 1 – Artisan Weekly Hours in Craft, we observe that most (74%) of B dedicate between 40 to 56 hours to craft, while NB are equally divided between this class (42%) and those that dedicate more than 56 week hours. In this analysis we were expecting to assess if the techniques and tools introduced during PAED have affected labor productivity. But our data regarding number of Products and number of different lines did not come as intended. In Q31 and 40 the Evaluator wanted to assess the number of items produced and number of different product lines per unit time in order to compare productivity indicators and the cost of labor. The response we got was mixed between the two with different time references, which make the assessment difficult.

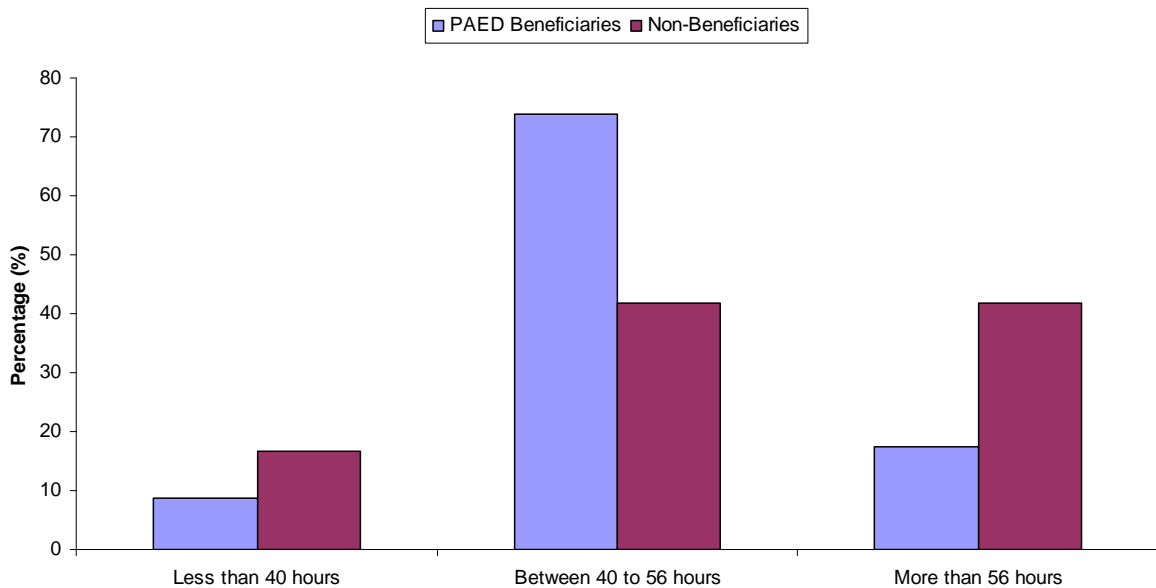


Figure 1- Artisan Weekly Hours Dedicated to Craft

Craft as an Opportunity for Job Creation (Question 14)

Although the majority of the artisans live on single family member income earner (above 52% said so), with a strong dependency ratio on a single income for the NB, it is clear that B more than members in the NB group, also bring an extra income to their households (48% against 35% that said they had 2 or more members contributing to income generated in the craft business). Putting together data from Tables 8 and 9 we may conclude that the extra income brought by other household members is also from activities in the craft business.

Table 9: Household Income Contributing Members

Number of members	Beneficiaries	Non-Beneficiaries
	%	%
1 member	52.2	64.6
2 members	34.8	20.8
More than 2	13	14.6
Total	100	100

Craft as a Tradition (Question 15)

A great majority (more than 71%) of the interviewed artisans have worked in the business for more than 10 years, indicating that it is a traditional habit and that the project might not have any influence in attracting new artisans to the sector. Refer to Figure 2 – Time Working as an Artisan. It would be important to assess the development of the artisan sector in the country, detailing the type of craft, number of HH members involved, by province. It is also necessary to update the existing baseline that was done more than 10 years ago and having in mind that important dynamics might be introduced in the last 5 years. The GOM gave orientations¹⁷ to execute a budget of US\$300.000 allocated at district level in recent strategy

¹⁷ Manuel Chang, Minister of Finance, 2006. – Orientações Metodológicas para Execução de Fundos para despesas de Investimento de Iniciativa Local, 2006

to promote rural development and decentralization. Of interest are the increased possibilities open for the artisan group giving them a special treatment to bid for this fund.

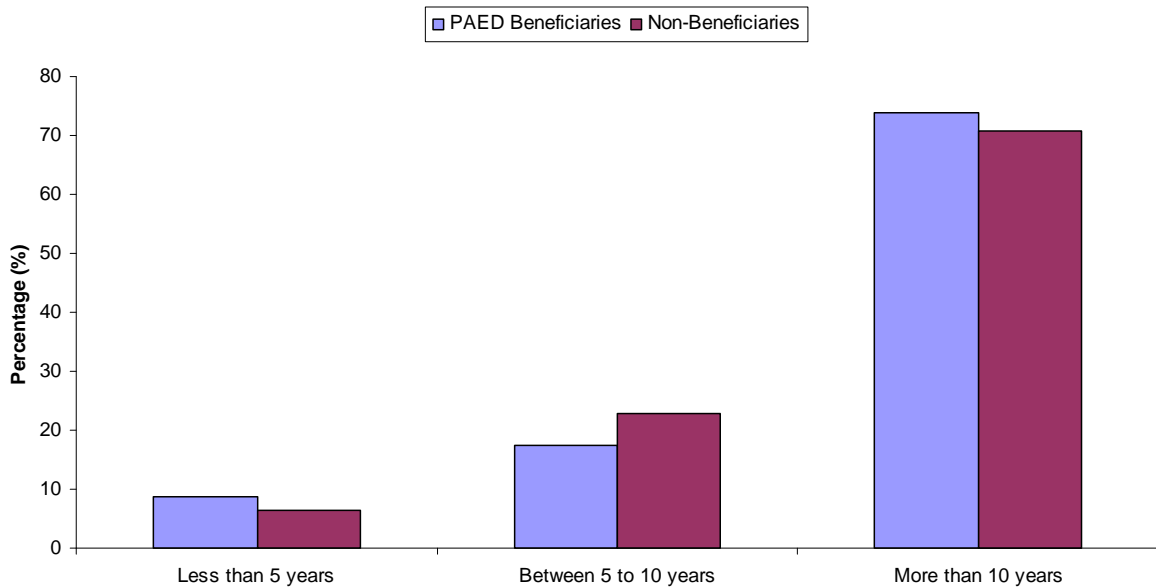


Figure 2- Time Working as an Artisan

When asked where they mostly get their craft abilities the majority said from their family members while the second next way to acquire abilities was through exchange with other artisans. Only one artisan in both groups mentioned formal training as a way of acquiring craft abilities. Refer to Table 10 – How do Artisans Acquire their Abilities.

Table 10 – How do Artisans Acquire Abilities

Modes	% Beneficiaries	% Non-Beneficiaries
With other family members	56.5	77.1
With other artisans	34.8	18.8
Formal Training	4.3	2.1
Alone	4.3	2.1
Total	100	100

CONCLUSIONS & RECOMMENDATIONS: It is apparent that to build artisan ability, support in two different ways should be emphasized (according to Table 10). If the most important vehicle for passing abilities to artisans is both through family members and artisans exchange programs, then it makes sense in the future to accommodate these in the project training side. It is however surprising to register that only a minority (1 artisan, 4.3%) mentioned formal training as a way to acquire craft abilities. This may also indicate a preference for on the job training rather than on-class training.

Artisan Living Conditions (Question 18)

We checked the artisan’s perception of their general situation before 2001 (Before PAED) and the situation now at the time of interview (2006). According to the Figure 3, 100% of the B did not see any worsening in their general situation on the contrary 78,3% of them mentioned that their situation has improved, while NB are divided in two same size sub-groups (40%) where the situation either worsened or improved. Approximately 19% of the artisans interviewed have not changed their general situation

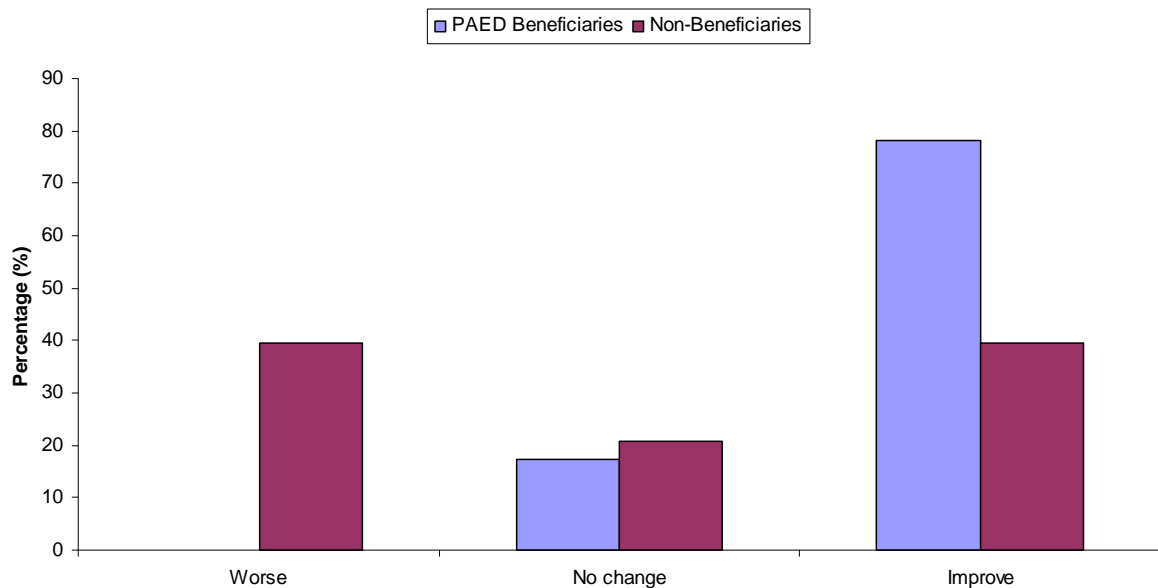


Figure 3 – Artisan Situation Trend before 2001 compared to 2006

We ran a Chi-Square test on the data from Question 18, in order to check the degree of robustness between the Beneficiaries and the Control group. The statistical analysis (Table Q3) not only indicates that there is a clear difference between the two groups, but also that a relationship exists between the improved situation and the artisan being or not a PAED

beneficiary. More than 70% of the NB and 87% of B indicate that craft was the major reason for their improved situation (question 19).

Table Q3 – Artisan Situation Trend before 2001 compared to 2006

Artisan groups	Worsened and not changed situation		Improved situation		Total	Chi-Square
	Frequency	%	Frequency	%		
Beneficiaries	4	18.2	18	81.8	22	0,001*
Non-Beneficiaries	29	60.4	19	39.6	48	
Total	33		37		70	

* Statistically Significant at 1%

CONCLUSIONS & RECOMMENDATION.: We can conclude that PAED made a difference in the lives of the interviewed beneficiaries (see Fig. 3). This conclusion can be more conclusive when we aggregate information about living conditions from the analysis of Q20, 21a, b, and 22.

Questions 20, 21a, b, 22:

According to the Figure 4 – Property Ownership and Table 11 – Housing Facilities, 78% of PAED beneficiaries own the house where they live, 57% have access to electricity and piped water at home (35%). Almost all (87%) own a cell phone. Of those Non-Beneficiaries 65% own their own place, but only 29% and 17% have electricity and piped water respectively at home, and only 48% own a cell phone.

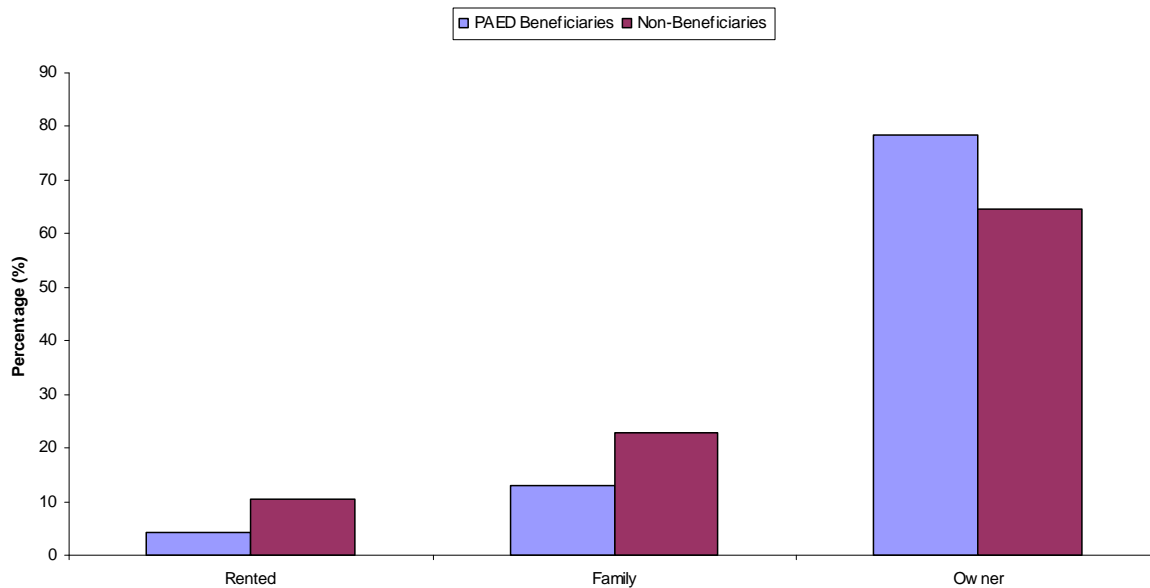


Figure 4 – Property Ownership

Table 11 – Housing Facilities

status	Beneficiaries		Non-Beneficiaries	
	Electricity	Pipe Water	Electricity	Pipe Water
	%	%	%	%
NO	39.1	60.9	70.8	81.3
YES	56.5	34.8	29.2	16.7
No Answer	4.3	4.3	-	2.1
Total	100	100	100	100

CONCLUSIONS & RECOMMENDATIONS.: It is evident that there is a clear difference between the two groups, and clear improved living standards of those that benefit from PAED from those that do not.

Degree of Entrepreneurship (Q 23 trough 25)

We also tried to analyze in more detail the response to Questions 23 and 24, about the evolution of the professional situation of the artisan before 2001 and now. The trend can be shown in Figure 5 – Professional Evolution from 2001 to 2006, where 44% of non-beneficiaries felt no evolution in their situation, whereas 61% of the Beneficiaries from working alone in 2001 became an Owner in 2006.

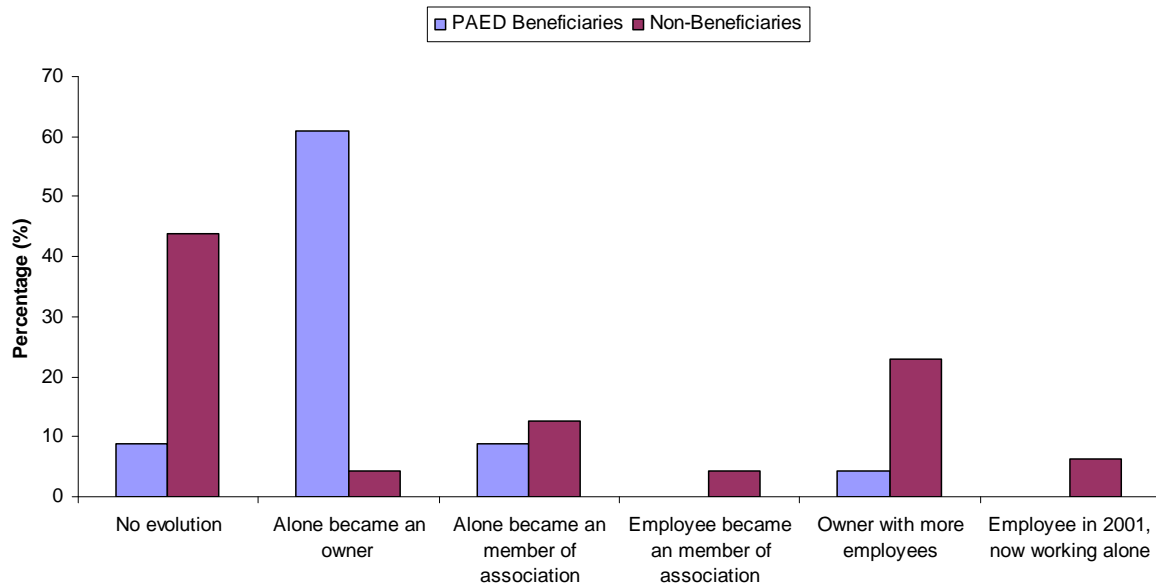


Figure 6 – Professional Evolution from 2001 to now

Regarding the response we got from Q23, 24 and 25 regarding entrepreneurship evolution, there were cases where we did not get the desired accuracy, mostly due to the degree of complexity of the question, with 6 levels of dependency. The E recognizes that at this field level questions should be straight forward to avoid the possibility of bias or wrong interpretation.

We also wanted to know how robust could comparisons be made between PAED Beneficiaries and the Control Group (Non-Beneficiaries, Question 29). Confused interactions might have camouflaged the degree of PAED contribution to the target group had the control received support from any other organization. This was not the case as 94% of the NB group mentioned not to have received support from anybody. This also illuminates an important aspect for the craft sector in Mozambique – besides ATA, there is no other organized support to the craft sector.

CONCLUSIONS & RECOMMENDATIONS.: The sector continues to be vulnerable, and the degree of vulnerability will increase if or when ATA discontinues their support.

Gender Trends

Unfortunately the craft sector most oriented to do business in Mozambique is in itself gender biased and mostly wood based, therefore most support to the sector is intrinsically gender biased. Wood crafters are men. According to respondents to question 30, wood was and will continue to be the most used by artisans and desired by clients, independently of received support in terms of product diversification and sustainability issues. As we will see further down in the analysis, there is an increased interest to work on more specific issues relating to sustainable use of the natural resources.

CONCLUSIONS & RECOMMENDATIONS: From gathered information it is apparent that Mozambique Crafts value is mostly based on the quality of wood and quality of carving. There is an urgent need to guarantee that this trend will continue in a sustainable way and sustainably managed forest are guaranteed as a reserve for the purposes of the craft sector. More emphasis and resources need to be dedicated into forestry development, conservation, and certification, which may fall considerably outside of conventional craft sector support. At the same time, other resources need to be explored in order to diversify (decrease the pressure in a single resource and at the same time increase opportunities to other groups, e.g. non-wood forest products like natural dyes, leather products, recycled products, natural textiles—bringing ATA’s experience from other parts of the world)

Technological Trends (Questions 33 and 34):

52% of NB and 30% of B artisans said they used either a technique or a specific tool to make their products before 2001. This is interesting as we see a clear trend in the response of the 2 groups which may be related to the degree of knowledge difference about tools and techniques within the 2 groups. It was clear that the Beneficiaries have now a clear knowledge on this issue and when asked about technique improvement Table 12 – Tools and Techniques Trend since 2001, 87% of the B and only 29% of NB mentioned to have improved. During the field visits two aspects could be observed: a) the quality of tools and workshop facilities in some beneficiary homes (with the use of power tools and so access to electricity) compared to artisanal mostly manual tools used by most non-beneficiaries, the other aspect is the quality of the final product which presented clear outstanding marks from those produced by other artisans.

Table 12 – Tools & Techniques Trend since 2001

Change from 2001 up to now	Beneficiaries	Non-Beneficiary
	%	%
No Improvement	13	70.8
Improved	87	29.2
Total	100	100

CONCLUSIONS & RECOMMENDATIONS: It was impressive to see the used tools in some of the PAED beneficiaries' workshops which cannot even compare with those used by the NB. A note goes to the ability of maintaining those tools in operation. This is a market issue, but it should be raised whenever introducing new technologies (like the machine tools). (See consultant report regarding this issue.)

Access to Crafting Resources

Figure 7 – Access to materials from 2001 to 2006, show the group's impression on the access to any materials used for craft products. The majority of the respondents feel that today is more difficult to get materials than in the past, but it seems that NB have more difficulty than the Beneficiaries. The original idea of this question was to explore more about the access to raw materials, but we got a mixed answer between those and other materials like sand paper and the use of other tools.

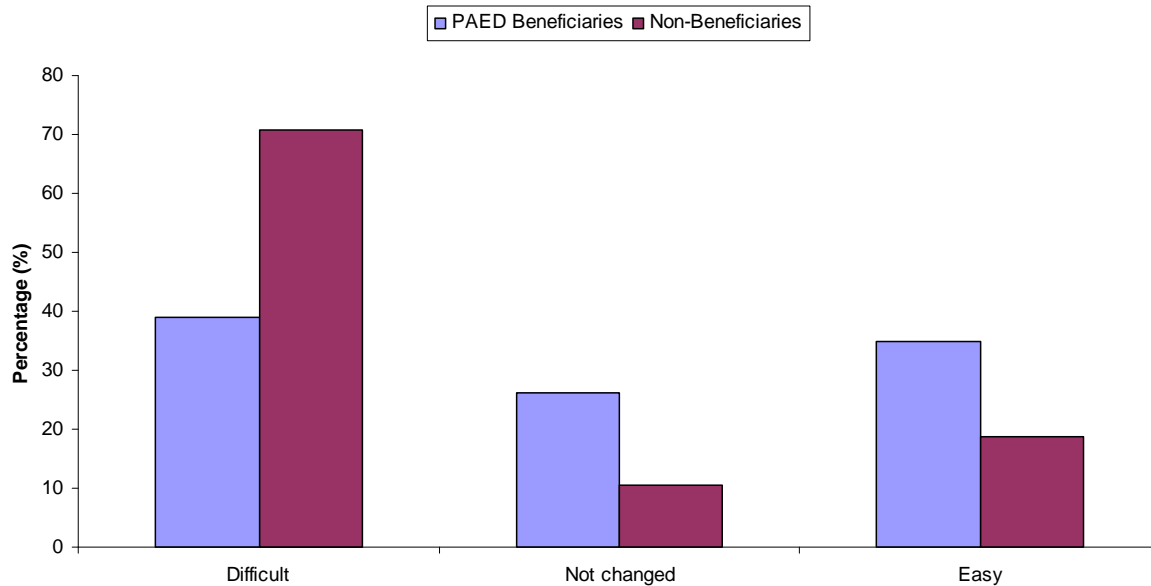


Figure 7: Access to Materials from 2001 to 2006

CONCLUSION & RECOMMENDATIONS: It is important to make a more detailed study on the access of raw materials for the craft industry. Questions like the opportunity cost between using wood for craft and other use needs to be addressed. Can the evaluator access this study for Mozambique and RSA?

Question 36b, 37 and 38:

This question addressed the typical way artisans get their raw materials and further it assessed the degree of acceptability of the wood banks promoted by PAED. Although both groups mostly pay for the raw materials (B-87%, and NB-79%) they acquire the wood from two different sources - 65% of the B from the Wood Bank while 61% of NB acquire wood from the rural areas. 100% of the B said they get good quality materials while only 69% said so in the NB group. When asked about the method used for acquiring wood, 65% of the B mentioned the WB to be a good method while only 35% of NB (acquiring wood elsewhere) considered this to be a good method.

CONCLUSIONS & RECOMMENDATIONS: The wood bank is apparently a good strategy, and needs expanding for use by other artisans. The issue is, however, how to manage the wood banks in the future. An evaluation of the 2 Wood Banks organized by ATA (Maputo and Nampula) needs to be accomplished in order to assess their potential as standalone businesses, which could attract the interest of business-oriented people.

Training and Work Place

Question 41a:

74% of the B mentioned that they received instructions and ideas to develop their products from ATA while of the NB, 46% either use their own creativity, 31% get ideas from other artisans and 19% get information from clients.

Question 45:

This question assesses where the artisan produce their crafts. 48% of PAED B produce their work in a home workshop, while 63% of the NB do so in a workshop outside. Refer to Table 13 – Production Location

Table 13- Production Location

Place of Production Unit	Beneficiaries	Non-Beneficiaries
	%	%
Workshop at home	47.8	37.5
Workshop outside	26.1	62.5
Both	26.1	-
Total	100	100

Table 13 – Production Location, shows that close to 50% of the B have their own Business at home while 38% of the NB do so, which may indicate a certain improvement on the degree of self-sufficiency on the part of the Beneficiary group in relation to NB.

Question 46, 47:

Most artisans mentioned interaction with other artisans, but only 9% mentioned that this opportunity was promoted by ATA. While most beneficiaries (87%) received training to manage their business, only 13% of the NB did so. Of those that received training 80% said they had the training modules with them, and 85% mentioned that those modules were easy and useful to use. See Table 14 – Training to manage your business.

Table 14- Training To Manage Your Business

	Beneficiaries	Non-Beneficiaries
	%	%
No training	13	87.5
Received Training	87	12.5
Total	100	100

The field enumerator was asked at times to request to see the modules (if they were interviewed in the work place) and the information registered is consistent.

Sustainability (Question 48f):

We asked artisans if they felt they were capable to continue their business alone, without any support. 61% of the B and 52% of NB mentioned it was not possible to continue without external support. See Table 15 – Artisans Capacity to Continue without Support.

Table 15 – Artisans Capacity to Continue Without Support

Able to Continue Alone	Beneficiaries	Non-Beneficiaries
	%	%
Not able	60.9	52.1
Capable	30.4	12.5
No response	8.7	35.4
Total	100	100

CONCLUSIONS & RECOMMENDATIONS: There are probably three issues we may get from this data. First, in general, support to Artisans is still needed. Second, once the artisans (Beneficiary group) understand the potentials and the complexities of the system the more they feel impotent to do so alone, and thirdly, as ATA has always done one crucial part of the craft business cycle – trading and exporting it also created a high dependency level that will be difficult to overcome, should ATA remove itself from the picture.

Business Management and Constraints (Question 48g):

When asked about the weakest point of their business they most often point to the level of sales, but less so for PAED beneficiaries (61%) than for NB (80%).

CONCLUSIONS & RECOMMENDATIONS: This statement may seem contradicting as previous interviews with ATA staff where they mentioned that at moments, the artisans capacity to produce enough for the market was really a lost opportunity that PAED never managed to maximize, but can be explained better if we take into consideration that orders come in large bouts, producers want steady orders. It is apparent that beneficiaries had more sale opportunities than their colleagues that did not benefit from PAED.

Question 49 and 49a:

Most Beneficiaries have a bank account (83%) and manage to have savings (78%) while only 33% of the NB have a bank account and only 44% manage to have savings. More details on Table 16 – Bank account and savings

Table 16 – Bank Account and Savings

Situation	Beneficiaries		Non-Beneficiaries	
	Bank Account	Savings	Bank Account	Savings
	%	%	%	%
No Account	17.4	4.3	64.6	37.5
Have an acc.	82.6	78.3	33.3	43.8
No response	-	17.4	2.1	18.8
Total	100	100	100	100

CONCLUSIONS & RECOMMENDATIONS: One of the key issues in developing a business is to have a registered business and a bank account. Although we raised the question about the legalization status of the business (Q24d2) we did not get the desired data quality to make an analysis (low response). It is evident in the data on Table 16 that Beneficiaries are more business oriented and possibly more prepared to benefit from any support given to the sector than their counterparts. It is not surprising to see that those that have bank accounts report higher degree of savings.

Sales (Question 50):

When asked about sales trend from 2001 to now, 70% of PAED beneficiaries said their sales increased while only 35% of Non-Beneficiaries said so. To increase the robustness of this affirmation from [Figure 9 – Sales Trend compared to 2001](#), we can observe that there is a general feeling (approximately 50%) among those non-beneficiaries that say sales have indeed decreased with time, where less than 8% said so among the Beneficiaries.

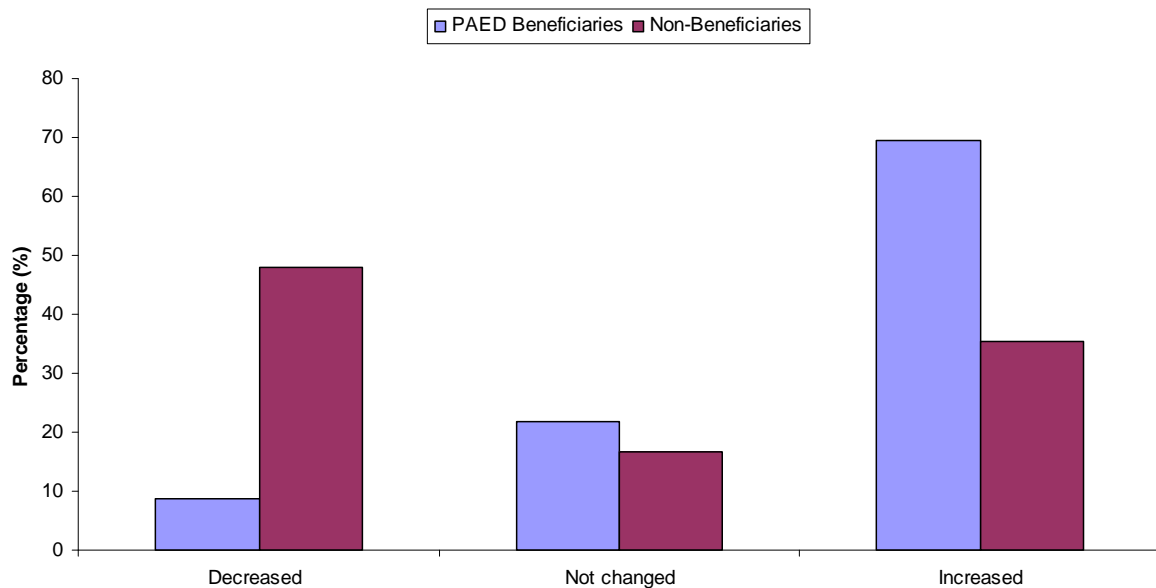


Figure 9 – Sales Trends Compared to 2001

CONCLUSIONS & RECOMMENDATIONS: From data on Figure 9, it is evident that the project has made a positive contribution in improving sales of those supported under PAED. Although the opportunities that were created in the sector only benefited PAED supported artisans. It would be interesting to study if PAED support given to artisans has negatively affected the sales of those non-beneficiaries. E.g. improved access to markets, improved products quality may have increased the gap on the sales potential between the two groups. If that is true, that may be an indication that the market is either finite (more production than demand), restrictive or a combination of both.

Income (Question 51):

We also asked how artisans ranked their income from craft sales compared to the situation in 2001 and 65% of the Beneficiaries said that crafts income have improved while only 29% of Non-Beneficiaries said so; yet in the same control group (see Figure 10) more than 50% said that income from craft business had instead decreased, which may reinforce our previous conclusion that PAED may have contributed negatively to income for non-beneficiaries.

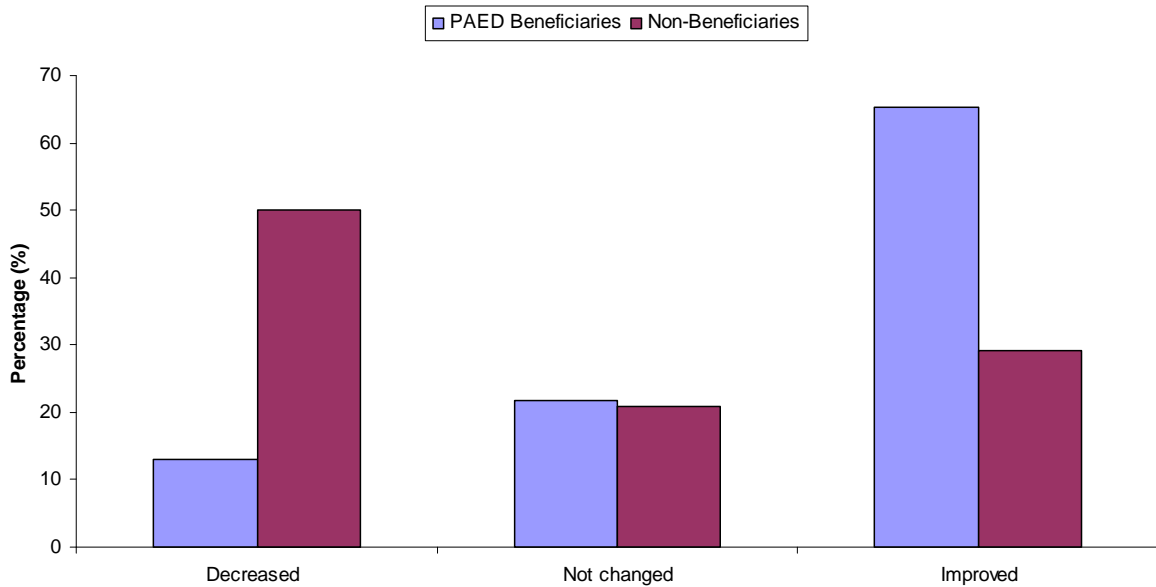


Figure 10 – Artisans Income Trend since 2001

Question 52:

When asked about their major client 74% of B mentioned that ATA was their major client while 71% of NB group mentioned tourists as their major client.

Repeat Clients (Question 53a):

Specific interest in PAED indicators was how many regular clients or repeat orders from same client artisans have managed during the project support. 91% of B have regular clients while only 29% of NB keep the same clients. More than 95% of the B makes their products under consignment while only 58% of NB do so, the remaining 40% decide themselves what to produce. This trend shows a general inclination towards the market, but the B being more market oriented.

Major Costs (Question 54b 1, 2, and 3):

Artisans were asked to rank their 3 highest costs to produce the final product. Of the B 57% mentioned that Raw material was the most expensive item followed by labor (30%) and transport (24%). For the NB, 40% mentioned materials (other than raw materials) as the most expensive item, followed by labor (17%). The reviewer is not aware how much those values reflect reality or if one group is more realistic than the other to price their product.

CONCLUSIONS & RECOMMENDATIONS: We would like to raise the question that in general some Mozambican prices in SARCEA were comparatively higher than similar products from other countries. It is also common practice for the producer not to be involved (at least in the sales points) in the sales negotiation. It is rare to see the producer also selling the products in the market of their products. This group of middle person also needs targeting by any craft development intervention. They do not seem to understand how to balance the effects from selling more in a period of time from gains in unit sales. They miscalculate their cost of time and just go on maximizing the opportunity cost and bargaining (from personal interviews with street vendors).

Question 54c:

It is almost a consensus between both interviewed groups that the major constraint to increased sales is the absence of the market. More than 74% of both groups said so.

Participation in Fairs and Marketing (Question 57):

Artisan Participation in fairs in Mozambique has been promoted by PAED. 70% of PAED beneficiaries and only 19% of NB mentioned to have participated in Fairs.

Question 60:

Table 17 – Artisan Product Marketing shows the trend between the 2 groups. It seems that they understand the concept of marketing (less than 10% of missing values) but do not see the need to do so or don't know how to do it. Both groups seem homogenous in this respect.

Table 17 – Artisan Product Marketing

Do you market?	Beneficiaries	Non-Beneficiaries
	%	%
No	65.2	70.8
Yes	26.1	29.2
No Response	8.7	-
Total	100	100

Export Trends

When we asked about exporting products (Q62) only 35% of the B said they exported products, against 96% of the NB that said they never exported products. Of those exporting, the main support came from ATA and Comercio Justo for B and NB respectively. However when asked about how long they have been exporting, 38% of B exported before 2000 and 62% in 2001, while for the NB they exported in 2003. We also asked about the level of product rejection. We have to say that a table is not presented because of the high level of missing data in both groups (up to 57%). Of those that responded, a 50% rejection rate is apparent in B group, while on the NB we registered a lower rate of approximately 12%. It is difficult to make conclusions because of the high level of no response. We also asked if artisans had products that did not sell. Again we got a higher level of no response, apparently indicating to purposefully hide information. We found a bigger proportion of non sold products for the NB of around 56% while of the B that responded to the question, 30% mentioned rejection to be a problem.

Trend in Clients (Question 65):

We asked artisans about the trend in clients from 2001 (see [Figure 11](#)). 61% of B compared to only 19% mentioned an increase in clients. This is a bit strange for the Evaluator, as we would expect a general increase trend for both groups, as Tourism statistics indicate a bigger increase in tourism industry and tourist influx in country. If we consider the situation regardless of whether the situation has improved or not, we have approximately 40% of the B and 55% of NB saying that they don't see any improvement in the number of clients. Unfortunately we also registered a great number of missing responses on the side of the NB group (30%), so any analysis to this group needs caution. At the same time the comparisons between the two groups cannot be validated statistically.

Product Quality and Orders (Questions 66 to 68):

On Table 18 – Product Quality, we assessed various indicators to attest the quality of the artisans’ craft product and the relationship with the export market. It is strange however to see that while we had many missing data in a few related questions, this was not case for the above responses. In general both groups register a high frequency affirmative response for all of the questions which may indicate a good Quality product. Between 50% (NB) and 70% (B) are happy with sales, even though they have mentioned before that sales was their business weakest point.

Table 18 – Product Quality

Frequency Table (%)	B	NB	B	NB
Questions	YES		NO	
Do you have various orders for the same product?	69.6	52.1	30.4	47.9
Do you have orders from same client?	100	62.5	0	37.5
Are you happy with sales?	69.6	50	30.4	50

Outreach of “As Mãos Falam” (Question 69):

PAED mentioned that the other way to reach the craft sector was through the distribution of a Bi-Monthly Bulletin. We assessed the distribution, the quality of the bulletin and the regularity in the distribution; refer to Table 19 for details.

Table 19 – Distribution of Bulletin “As Mãos Falam”

	B	NB	B	NB
	YES		NO	
69: Do you receive the Bulletin “As Mãos Falam”?	82.6	31.3	17.4	68.8
69a: Is the Bulletin useful for your business?	84.2	66.7	5.3	13.3
69b: Is the distribution Regular?	31.6		63.2	100

Most B (83%) and only 31% of NB artisans mentioned to receive “As Mãos Falam”. They unanimously mention that the Bulletin is useful (the response is a cross data where we used only those that receive the bulletin). How regular is the distribution? -- We grouped the

answers into two groups: Regular distribution for those that receive one magazine every 3 months and irregular for answers above that limit. Most mentioned that the distribution was irregular. We may conclude that this was clearly a missed opportunity. The bulletin was a good source of information that just did not get to the target group.

CONCLUSIONS & RECOMMENDATIONS: It is unfortunate that ATA did not dedicate a specific effort to make sure that such an important vehicle of information could really reach the hands of those initially targeted. This is even more important if we consider that one way to increment the outreach of PAED was by the use of the Bulletin. We believe that this point is very critical in the overall evaluation, and a new number for the affected artisans by the project needs to be estimated. When we have 100% irregular distribution of the bulletin, then we raise the question: How confident is ATA-MOZ to state that the number of reached artisans from 2001 to 2006 is very close to the target? The reviewer had no access to information in order to confirm the registered numbers. It is evident that the Bulletin had quality and was useful to few that received it.

Routine Visits (Question 70):

We asked the artisans if they received any visits to support their business and how regular and how long on average those visits lasted. Table 20 – Support to Artisan Business, illustrates information about received assisting visits during the PAED period.

Table 20 – Support to Artisan Businesses

		YES		NO	
		B	NB	B	NB
Did you Have Visits to support your Business?		52.2	8.3	47.8	91.7
How many visits per year	3 or more	58.3	0		
	2	16.7	75		
	1	25	25		
Less than 2 hours per visit		74	50		

There was some missing data on the response about the duration of visit, and the quantity of those who responded on the NB group may not be representative to take any conclusions.

Business Practices (Question 71):

One of the training provided on a regular basis by PAED was related to calculation of costs and prices for products. To do so, the artisans were trained about basic bookkeeping, we assessed to what degree the lessons were assimilated and became common practice. See Table 21 – Artisans Bookkeeping Practices.

Table 21 – Artisans Bookkeeping Practices

	YES		NO	
	B	NB	B	NB
71: Are you aware of any form to do your commercial transactions (e.g. Costs, orders, time)?	69.6	33.3	4.3	64.6
71b: do you register your expenses in a book?	91.3	33.3	8.7	66.7

From Table 21 it is apparent that most B are aware of the basic bookkeeping procedure, however we notice some missing data, that most probably was related to not understanding the question itself as on the next question 91% answered to exercise the registration of costs, while the NB not only do not know about this practice (65%) neither do they do the costs registration.

Business Tax (Question 71):

When asked about if they needed to pay any tax, we found a certain degree of missing data, which may be either related to not understanding the question, not knowing the response or feeling that the question was too sensitive. Of those that responded that they paid taxes we asked what type of taxes they were paying. The data can be seen on Table 22 – Artisans Taxation. In both groups most payments go to the Municipality.

Table 22 – Artisans Taxation

		YES		NO	
		B	NB	B	NB
71c: Do you need to pay tax?		65.2	37.5	21.7	33.3
71d: Which taxes?	Municipality	60	66.7		
	Ministry of Finance	13.3	22.2		
	Airport	20	0		
	Cantinho	0	11.1		

General Comments on ATA Support (Question 73a):

We asked Beneficiaries if the support they were receiving from ATA was oriented in such a way as to minimize their major needs. See Table 23 – PAED impact on Artisans major needs

Table 23 – PAED Impact on Beneficiaries Major Needs

Is the support received targeting your major needs?	Beneficiary	
	Frequency	%
NO	6	26.1
YES	8	34.8
No Response	9	39.1
Total	23	100

We were surprised to get such a great number of no responses. But if we exclude these, we still can see that on average 57% feel that PAED was targeting most of their needs. One aspect related to the response (or no response) may be related to the fact that PAED may have not been very active in the field during the last phase of the program, as most staff was busy with other activities.

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Annex 1.1 – Evaluation Scope of Work

PAED Final Evaluation (South Africa and Mozambique) Scope of Work

May 16, 2006

PAED PROGRAM BACKGROUND

The PAED program was designed as a follow-on project to RISE, ATA's matching grant country programs in Mozambique and Tanzania, with an expansion into South Africa. The proposal describes PAED as helping "African craft break away from the stereotypes of Kente cloth and tribal masks and take its rightful place as an innovative provider of products that draw from deep cultural resources...so that Africa's diverse and dynamic craft industry ...generates economic and social benefits for Africans and substantially contributes to the economy" of Mozambique, South Africa, and Tanzania.¹ PAED was to reach 5,700 artisans and broker nearly \$3 million in sales through implementation of a comprehensive strategy to supply design innovation, access to important markets, and business trainings to artisan enterprises.

Additionally, the PAED project provided funding for strengthening ATA's internal capacity to deliver its services while developing innovative approaches to strengthening the craft sector. ATA's institutional strengthening goal focused on strengthening and diversifying training products, in particular:

- a production mentoring program, whereby small producers learned from experienced export oriented enterprises;
- an exporter training program, specific for new exporters to the US market using Mozambican exporters as initial participants; and
- an African Market Readiness Program (AMRP), modeled on ATA's successful New York-based Market Readiness Program (MRP).

In Mozambique and Tanzania, ATA focused on capacity building through scaling up production systems, organizational development for artisan groups and expanding services to reach more artisans. In Mozambique, ATA planned to nurture the creation of a Mozambican artisan association and continue to encourage and facilitate artisans' involvement in the conservation of natural resources. In Tanzania, ATA intended to strengthen our partner organization's capacity to work in commercial markets and in advancing artisans' skills in design and building on their business knowledge, and phase out after three years. In South Africa, ATA partnered with the BAT Shop to begin to bring market-driven product development and market links to South African artisans, as well as to broaden ATA's network to include other organizations, businesses, and craft sector service providers such as designers.

The program planned to open opportunities for craft businesses across Africa to participate on a fee-for-service basis in years two through five. The expanded fee-for-service aspect of

¹ ATA's PAED proposal, October 2000.

the program would allow ATA to extend its ability to recover costs and to encourage artisan investment in their own success.

In October 2001 as PAED was launching, ATA had a solid field office in Mozambique, led by Regional Field Director Lorraine Johnson, and a worsening relationship with Amka, the Tanzanian implementing partner. For both countries, baseline data was determined to be the final RISE indicators, which were simplified for PAED. Baseline data in South Africa was taken from BAT Shop's previous year's performance. None of the planned training modules had progressed past the idea stage.

At the time of the midterm evaluation, all three training modules were being implemented; a nascent Mozambican artisan association had disintegrated, but ATA staff members were planning an organization. After splitting with Amka, ATA worked directly with several craft businesses and organizations. BAT sales had increased substantially and ATA was expanding the South African network.

Now with the completion of the PAED project less than six months away (September 2006) ATA is looking towards the next phase of its work in Mozambique and South Africa. Based on the results of the final evaluation and discussions with its partners, and current and potential funders in both countries, ATA will determine its next steps. The future of ATA in Mozambique and South Africa will be geared toward strengthening the long-term stability of its work that has been carried out thus far.

EVALUATION OBJECTIVES

The primary objectives of the PAED final evaluation are specific to Mozambique and South Africa, as ATA conducted limited activities in Tanzania after the mid-term evaluation. The objectives are:

1. Assess the overall impact of the PAED project (keeping in mind that the PAED project was a follow-on project to the RISE project that implemented project activities three years previous to the PAED project) on project beneficiaries compared to non-project participants (where possible) in regards to the project's goals of improving the market success of artisan products, employment creation, improved access to economic opportunities by artisans, and the increase of artisan sector income levels. Compare overall results in relation to the project baseline study (for Mozambique only), PAED indicators/targets, and midterm evaluation.
2. Evaluate if ATA accurately assessed the overarching problem that the substantial potential individual incomes and contributions to African economies were not being realized in the Mozambique and South Africa artisan sectors.
3. Evaluate whether ATA's solution, reaching 3,700 artisans and generating \$3 million in sales, was an appropriate response to the problem as described above.
4. Determine "if" and "why" the program's objectives were achieved fully, partially, or not at all. PAED key objectives include:

Capacity building objectives

- Increase the operational and training capacity at headquarters and country level

- Capitalize on the existing information technology
- Increase ATA's earned income and revenue

Service delivery objectives

- Expand market and sales opportunities for African artisans
- Provide artisans with business training and design assistance
- Continue to develop market-driven products for and with artisans

Sustainability objectives

- At headquarters level, continue to diversify funding sources and build strategic alliances
- At country level train artisans and partner organizations to provide effective customer service to commercial markets to maintain and expand markets after the PAED project ends
- Strengthen the export sector through training activities, participation in international trade shows and a mentoring process with international buyers
- Train artisans to develop quality products for international export independent of ATA

Country specific objectives: Please see country specific planning matrix of the PAED Detailed Implementation Plan for country specific objectives

5. Evaluate the quality of activities carried out through the project to determine which activities were most useful. PAED key activities include:
Both South Africa and Mozambique: product development(pls specify e.g. design mentorship), trade show participation, Market Readiness Training Program (US and Africa) participation (local staff, artisans, exporters), buyer visits, tailored local trainings, "other" local fair participation and strengthening local design capacity
South Africa Specific: establishment of ATASA Trust, SARCDCA participation and local marketing efforts for all PAED countries, creation, development, and management of the Africa Market Readiness Program training, networking with South African designers (professional and emerging) to build up ATA's database of local designers, assessment of Limpopo Province craft sector (study not ready)
Mozambique Specific: As Mãos Falam (artisan information bulletin), Export Mentoring Program, Produce Mentoring Program, facilitate legalization of artisan enterprises, As Mãos (National Holiday Craft Fair), development of enterprise promotional materials, permanent craft village, facilitating wood cutting licenses for artisans, wood bank, Technical Resource Center, distribution of tools & equipment, reforestation efforts,
6. Identify ways ATA support improved access to market opportunities for artisans, increased production capacity, strengthened business skills and improved market readiness
7. Determine how partnerships have assisted in increasing competitive edge and advanced the commercialization of craft industries
8. Indicate lessons learned and models that have emerged out of the project

9. Identify what networking opportunities were created through this project and the impact of those networks

SCOPE OF INTERVIEWS / FOCUS GROUPS

Mozambique	Participants	Activity
Artisans (3 classes of artisans: a) 450 directly affected by PAED b) 3460 indirectly affected and non-affected by PAED)	1.) Estimated at 75 total artisans in Maputo and Nampula (artisans interviewed can be from same enterprise but at least 15-20 different enterprises should be reached)	1.) From the baseline study, draw a sample of artisans in Maputo and Nampula that results in statistically significant information about 1. ATA participant businesses and 2. a control group. Data should be analyzed by two splits (Maputo/Nampula and participants/control) but ATA does not require multiple subgroup analysis (e.g. Maputo participants).
ATA Mozambique Staff	Total of 11 staff members: 9 staff member in Maputo and 2 in provinces	Individual interviews or focus group with staff (as determined appropriate by Evaluation Team Leader).
Partners	ADEMO in Manica, ACUDES in Inhambane, Comercio Justo de Mozambique, IIAM [Ministry of Agriculture], National Museum of Arts, IPEX, CPI, and Visual Arts School.	Individual interviews.

South Africa		
Artisans	1.) Artisans from participating businesses in Kwa Zulu Natal and Cape Town.	1.) 2 focus groups in each location, including some artisans who attended of the AMRP
Staff	Three staff members – Frances, Lorato, Lorraine.	Individual interviews of all staff.
Partners	Bat Shop, Cape Craft, Design Institute, Phumani	Individual interviews .

	Paper	
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Africa		
Artisans	1.) Non PAED countries: 3-6 artisans chosen from Ghana, Zambia, Kenya, Rwanda, Uganda and Madagascar. Selection will be based on staff recommendations for participants who ranked the training very high and very low on their AMRP evaluation form.	1.) AMRP attendees. Individual interviews by telephone.

US and Europe		
ATA Home office staff	Approximately 10 people (Lisa, Sonu, Mary, Karen, Jane, Marilyn, Barb, Lane, Fred, Clare)	Individual interviews or focus group to be conducted by US evaluator (either a staff member not related to PAED project or external consultant)
US/European Consultants	Approximately 5 people including Marketing Reps and Design and Business Consultants	Individual interviews or focus group to be conducted by US evaluator (either a staff member not related to PAED project or external consultant)
Funders	At least 8 funders, including USAID, foundation, and individual donors	Individual interviews to be conducted by US evaluator (either a staff member not related to PAED project or external consultant)
Buyers	At least 10 long-term and short-term buyers	Individual interviews to be conducted by US evaluator (either a staff member not related to PAED project or external consultant)

EVALUATION QUESTIONS

The final evaluation survey forms will be developed by the External Evaluation Team Leader in conjunction with ATA and will be approved by ATA. The survey questions should be designed using the following guidance:

- 1.) *USAID Evaluation Guidelines for Matching Grants*
- 2.) PAED Detailed Implementation Plan matrices

- 3.) ATA Mozambique Baseline Survey Forms
- 4.) ATA Sample Final Evaluation Survey Form
- 5.) Buyer and funder individual interview forms
- 6.) Staff group discussion form

The following research tools are required:

- 1.) Mozambique artisan survey should be a much abbreviated version of the baseline survey, such that a direct comparison with 1999 baseline data is possible.
- 2.) South Africa focus group facilitator's guide
- 3.) Buyer interview guide (ATA will provide examples used in previous studies)
- 4.) Funder interview guide (ATA will provide examples used in previous studies)
- 5.) Partner guide (at evaluator's discretion if this should be a focus group or interview series)
- 6.) Staff focus group facilitator's guide (

Work Outline	Original Deadline	Actual
PREPARATION		
Workplan proposal including budget issued to ATA by Verde-Azul Consult Lda.	31-Mar	
Issue workplan and contract to Verde-Azul Consult Lda. (Evaluation Team Leader)	5-Apr	1-Jun
Survey form draft due to ATA from VA	10-Apr	5-Jun
Comments on survey form draft due to VA from ATA	18-Apr	9-Jun
update final questionnaire		12-Jun
Test questionnaire in MPM & Final Version		14-Jun
Final Questionnaire form completed	20-Apr	16-Jun
Evaluation logistics organized by Verde-Azul and ATA RSA and Mozambique offices as determined	3-20 Apr	10-Jun
Interviews started	24-Apr	19-Jun
Moz Evaluation	25-Apr	19-Jun
Train Enumerators MPM	25-Apr	20-Jun
Supervise Field Work MPM		23-Jun
Questionnaire MPM		26-Jun
Train Enumerators Nampula		26-Jun
Supervise Field Work Nampula		27-Jun
Questionnaire Nampula		3-Jul
Train Enumerators Cabo Del		28-Jun
Supervise Field Work Cabo Del		29-Jun
Questionnaire Cabo Del		4-Jul
Interviews completed Moz	12-May	4-Jul
Data screening and Statistics	1-Jun	11-Jul
Data analysis and report writing		19-Jul
Final Draft Report MZM	15-Jun	19-Jul
RSA Evaluation		19-Jun

Joburg interview		21-Jun
Durban Interview		23-Jun
Cape Town interview	12-May	27-Jun
Data Screening and Statistics	1-Jun	3-Jul
Data Analysis and Reporting		12-Jul
Final Draft Report RSA	15-Jun	16-Jul
Final Draft Report USA to Verde Azul	6-Jun	
Data processed and analyzed	1-Jun	7-Jul
Evaluation report draft due to HO	15-Jun	24-Jul
Evaluation Debrief via conference call	19-Jun	26-Jul
Feedback on evaluation report	20-Jun	28-Jul
Final evaluation report due to HO	25-Jun	4-Aug
Evaluation report sent to funders	5-Jul	14-Aug

FINAL DELIVERABLES

The final deliverables of the evaluation are the following:

- 1.) Raw data (interview forms, etc) in English or Portuguese, in written or spoken copy for focus groups (tape recording). Electronic copy of coded data with coding guide.
- 2.) Raw data analysis in English (written)
- 3.) Focus group reports
- 4.) Report of summary of data analysis and findings in English (Due to ATA July 3, 2006)

PLAN FOR USE OF FINDINGS

ATA will use the findings of the evaluation to implement and improve future projects in Mozambique, South Africa and other ATA projects (to understand gaps in craft sector sustainability and lessons learned, from project design to level of effort). ATA will also report findings to project funders to demonstrate impact and return on investment.

KEY EVALUATION PERSONNEL

- Final evaluation team leader – Kemal Vaz, Verde-Azul Consult, Lda.
- South Africa Logistics Coordinator – ATA Staff
- Mozambique Logistics Coordinator – ATA Staff
- Interviewers/Researchers – Local interviewers to be contracted by Verde-Azul
- Data processor (same as team leader/researchers) – Verde-Azul
- ATA Home Office Evaluation Coordinator – Kirsten Bunch
- ATA Oversight and Advisors: Evaristo Madime, Frances Potter, Mary Cockram, Lorraine Johnson, Lisa Yoreo

ROLES AND RESPONSIBILITIES

See attached Final Evaluation Team Leader Consultant Work Plan.

Verde-Azul activities include:

- 1.) Serve as evaluation team leader and primary point of contact for ATA's Program Officer and ATA's Director of New Business and Evaluation, providing periodic updates as mutually agreed upon by both parties.
- 2.) Design project evaluation based on ATA's deliverables and evaluation objectives.
- 3.) Design evaluation survey forms based on ATA's current forms adjusted to fit the PAED evaluation, and *USAID Evaluation Guidelines for Matching Grants*
- 4.) Review existing project documentation and background, including project proposal annual reports, baseline study, midterm evaluation, and other relevant updates.
- 5.) Oversee/conduct in-country interviews and focus groups with artisans, staff, key partners and USAID representatives, utilizing local research team in most effective and efficient manner possible.
- 6.) Identify, contract, and manage experienced local interviewers; ensure quality of work
- 7.) Oversee interview and data gathering process.
- 8.) Compile and process raw data.
- 9.) Analyze raw data.
- 10.) Prepare final project evaluation report, synthesizing qualitative and quantitative research and observations, based on required format and mutually agreed upon outline.

ATA activities include:

- 1.) Conduct interviews and focus groups with ATA staff, funders, etc. outside of Mozambique and South Africa., and all funder interviews. Send qualitative report to VA.
- 2.) Provide logistical planning for evaluation with guidance from Consultant.

E V A L U A T I O N D E B R I E F

A conference call between ATA and Verde-Azul will be used to debrief all parties on evaluation. Verde-Azul will present results to staff in Mozambique (Mozambique staff and the Regional Representative).

Annex 1.2 Donor Questionnaire

Project Name: _____ *(name of ATA project)*
Date of Interview: _____ *(date interview was conducted)*
Interview Topic: _____ *(purpose of interview e.g. final evaluation)*
Donor Interviewed: _____ *(name of donor being interviewed)*
Individual Interviewed: _____ *(name of individual being interviewed)*
Interviewer: _____ *(name of person conducting interview on behalf of ATA)*

Purpose of the Interview:

ATA's goal is to link maker to market as described in its mission statement. ATA seeks to do so by continually learning and improving. This interview seeks to collect crucial data from the project's donors. ATA wants to identify what worked, what did not work and what can be done to improve overall project effectiveness. (A brief project description as well as the amount and duration of funding received should be provided in advance of interview.)

Questions for the Interview: (Please do not respond with yes or no answers. Please indicate suggestions for improvement where appropriate.)

- 1) What genuine development problem did the project address?
- 2) How realistic and appropriate was the project design?
- 3) How realistic and appropriate were the project outputs/indicators?
- 4) Was the project's implementation in-line with the project goals and objectives?
- 5) Was the reporting appropriate, useful and timely?
- 6) How were budget management issues identified and addressed?
- 7) How well managed was the project?
- 8) When compared to similar projects, how did the project compare in cost effectiveness and scale and depth of impact?
- 9) Describe project features where there is greatest need for improvement.
- 10) Describe if or how this project might have sustainable effects or impact.
- 11) Why was this project selected for funding?
- 12) In what ways did the project fit with your funding priorities?
- 13) Does the project still fit these priorities and would funding a follow-on project be considered? Why or why not
- 14) Please indicate if you would like a copy of the project evaluation?
- 15) On a scale of 1-10, 10 being completely satisfied and 1 being completely unsatisfied, how satisfied were you with the project in the following areas?

Rating	
	Project design appropriateness
	Project output/indicators appropriateness
	Project implementation satisfactoriness
	Quality and timeliness of communication and reporting
	Fiscal management satisfactoriness
	Project management satisfactoriness
	Project cost effectiveness
	Overall satisfaction (or average of the above)

(*This last number is essential to the interview and must not be left blank.)

- 16) Describe anything else that should be noted.

Annex 1.3 – Staff Questionnaire

DATE:

Finished Report:

For ATA Staff

I. Project Overview and results ()

Objectives of proposed project:

Overall project:

1. Capacity building objectives
 - a. Increase the operational and training capacity at headquarters and country level
 - b. Capitalize on the existing information technology
 - c. Increase ATA's earned income and revenue
2. Service delivery objectives
 - a. Expand market and sales opportunities for African artisans
 - b. Provide artisans with business training and design assistance
 - c. Continue to develop market-driven products for and with artisans
3. Sustainability objectives
 - a. At headquarters level, continue to diversify funding sources and build strategic alliances
 - b. At country level train artisans and partner organizations to provide effective customer service to commercial markets to maintain and expand markets after the PAED project ends
 - c. Strengthen the export sector through training activities, participation in international trade shows and a mentoring process with international buyers
 - d. Train artisans to develop quality products for international export independent of ATA
4. South Africa (please refer to attached PAED Planning Matrix)
 - a. The BAT Shop to respond effectively to market demands.
 - b. Building BAT Shop's operational and training capacity.
 - c. ATA builds a network of strategic alliances² in South Africa
 - d. The BAT Shop uses ATA website³ as a marketing tool to supplement BAT's and ATA's marketing efforts.
 - e. Develop and expand marketing and sales opportunities for South African artisans.
 - f. Provide artisans with business development services
 - g. The BAT shop provides training, design consultancies and market link services to artisans after EOP
 - h. Artisans are able to develop quality products for international export independent of ATA

Please refer to attached PAED Planning Matrices for details on proposed activities, indicators, and proposed measurement and data management methods.

QUESTIONS:

² Strategic alliances with designers, exporters, producers and craft organizations to build a functional regional network.

³ The site will serve as a marketing tool to expand reach to buyers that are not reachable through trade shows.

5. Did ATA accurately assess the overarching problem that the substantial potential individual incomes and contributions to African economies were not being realized in the Mozambique and South Africa artisan sectors?
6. Was ATA's solution, reaching 3,700 artisans and generating \$3 million in sales, an appropriate response to the problem as described above?
7. Were the program's objectives achieved fully, partially, or not at all? Why and/or why not?
8. What were the major successes of the project?
 - a. What did not go as planned?
9. Are there any important outcomes of PAED that were not planned for?
10. What partnerships were made through the project?
 - a. How did those partnerships benefit and/or impede the project?

II. Marketing ()

QUESTIONS

11. What were the major successes in marketing efforts/activities of the PAED program?
12. What were the major obstacles in marketing?
13. What could we have done differently?
14. What were the major lessons learned (good and bad)?
15. What international and local consultants contributed to the project? What were the results?
16. Was there a major constraint in exporter development?
17. Did PAED make a difference?. Why?
18. What training programs were implemented? What were the results (success, difficulties, etc.)? What would we do differently?
19. Do you think the link between importer and producer was strengthened? If so, in which way? If not, why not?
20. In your opinion, are artisans more capable of sustaining/growing their businesses (develop marketable product lines, maintain current and create new market links, and manage their business and finances) than before the PAED project?

III. Fundraising/Development ()

QUESTIONS

21. In what areas were we successful in raising funds for the project? Could we have done something differently in order to have a higher rate of success?
22. What "sold" the project to funders?
23. How is our relationship with the major funders – USAID, Ford, Kellogg, Ewing, West, SA gov't, UMCOR, UNESCO? (note – funders will be interviewed for the final evaluation)
24. What did we learn about managing a multi-funder budget?

IV. Project Management ()

QUESTIONS

25. How did the structure of the project management team work? What could we have done differently?
26. Did ATA choose good locations for country offices? Why/why not?
27. Did ATA choose good locations to work?
28. How was the relationship between the home office and field office? How could it have been improved?
29. What were the major obstacles to program management? What worked well?

30. How did ATA monitor results? What were the key tools used in M&E?
31. How did M&E information/results assist ATA in steering the project?
32. On a scale of 1-10, 10 being completely satisfied and 1 being completely unsatisfied, how satisfied were you with the project in the following areas?

Rating	
	Project design appropriateness
	Project output/indicators appropriateness
	Project implementation satisfactoriness
	Quality and timeliness of communication and reporting
	Fiscal management satisfactoriness
	Project management satisfactoriness
	Project cost effectiveness
	Overall satisfaction (or average of the above)

(*This last number is essential to the interview and must not be left blank.)

Annex 1.4 Consultant Questionnaire

Aid to Artisans, Inc. Key Consultant Interview

Project Name: _____
(name of ATA project)

Date of Interview: _____
(date interview was conducted)

Interview Topic: _____
(purpose of interview e.g. final evaluation)

Consultant Interviewed: _____
(name of individual being interviewed)

Interviewer: _____
(name of person conducting interview on behalf of ATA)

Purpose of the Interview:

ATA's goal is to link maker to market as described in its mission statement. ATA seeks to do so by continually learning and improving. This interview seeks to collect crucial data from the project's consultants. ATA wants to identify what worked, what did not work and what can be done to improve overall project effectiveness. (A brief project description should be provided in advance of interview.)

Questions for the Interview: (Please indicate suggestions for improvement where appropriate.)

- 1) What genuine development problem did the project address?
- 2) How realistic and appropriate was the project design and output/indicators?
- 3) Describe project features where there is greatest need for improvement.
- 4) How did the project compare, to similar projects, in cost effectiveness as well as scale and depth of impact?
- 5) Describe if or how this project might have sustainable effects or impact.
- 6) How well acquainted were you with the overall scope of the project?
- 7) How do you think your work contributed to the overall project?
- 8) In what way did your work contribute to improved business practices of those assisted?
- 9) If mentoring of an emerging designer took place, describe the effectiveness of that activity and indicate if anything should have been done differently.
- 10) How effectively was the project managed?
- 11) Would you be interested in working within a follow-on project?
- 12) On a scale of 1-10, 10 being completely satisfied and 1 being completely unsatisfied, how satisfactory was the project in the following areas?

<input type="text"/>	Project design appropriateness
<input type="text"/>	Project implementation effectiveness
<input type="text"/>	Consultancy appropriateness
<input type="text"/>	Quality and timeliness of communication
<input type="text"/>	Project management effectiveness
<input type="text"/>	Project cost effectiveness
<input type="text"/>	Overall satisfaction (or average of the above)

(*This last number is essential to the interview and must not be left blank.)

- 13) Describe anything else that should be noted.

Annex 1.5 Buyer Questionnaire

Project Name: _____
(name of ATA project)

Date of Interview: _____
(date interview was conducted)

Interview Topic: _____
(name of artisan enterprise on which the interview is focused)

Company Interviewed: _____
(name of buyer company being interviewed)

Individual Interviewed: _____
(name of individual at buyer company being interviewed)

Interviewer: _____
(name of person conducting the interview on behalf of ATA)

Purpose of the Interview:

ATA's goal is to link maker to market as described in its mission statement. ATA seeks to do so by continually learning and improving. This interview seeks to collect crucial data from the project's buyers. ATA wants to identify what worked, what did not work and what can be done to improve overall business effectiveness. All sales information are combined and reported collectively by project so that information provided through this interview remains confidential. (A brief project description as well as the US\$ value of orders placed since the beginning of the project should be provided in advance of interview.)

Questions for the Interview:

- 1) Did you visit the country to meet the artisan enterprises? (if no skip to #5)
- 2) How was the visit valuable or not to your business?
- 3) Would you have visited if ATA had not provided an incentive?
- 4) Describe the quality of ATA's assistance during your visit?
- 5) Did you place any orders in the last six months? (if no skip to #7)
- 6) What was the value of those order in US\$ at FOB?
- 7) How many shipments have you received in the last six months? (if none skip to #9)
- 8) What was the value of those shipments in US\$ at FOB?
- 9) Do you intend to re-order? If not, why?
- 10) How many products/product lines are you carrying from this artisan enterprise and which ones are they?
- 11) Did you do the designs of these products/product lines?
- 12) What do you observe to be the major strength/weakness of this artisan enterprise?
- 13) What do you see as the biggest challenge to this enterprise's products in the market?
- 14) From your experience, where best does ATA add value?
- 15) On a scale of 1-10, with 10 being completely satisfied and 1 being completely unsatisfied, how satisfactory was business with this artisan enterprise in the following areas?

<input type="checkbox"/>	Quality of communication (timeliness and substance)
<input type="checkbox"/>	Quality of packaging and packing
<input type="checkbox"/>	Timeliness of order delivery
<input type="checkbox"/>	Quality control satisfaction
<input type="checkbox"/>	Breakage satisfaction
<input type="checkbox"/>	Design satisfaction
<input type="checkbox"/>	Overall satisfaction (or average of the above)

————— (*This last number is essential to the interview and must not be left blank.)

16) Describe anything else that should be noted.

Annex 1.6 List of interviewees

Donors

Fernanda Farinha, W.K. Kellogg Foundation

Marko Saarine, UNESCO

Paula Nimpuno, Ford Foundation

Sidney Bliss, USAID MZ

Thomas Carter, USAID PVC/ASHA

Buyers

Bubbles, Art AfricaUBBLES,

Don Shay, Elegant African Craft Art

Elizabeth Howitt, Ecp-Brazil

Jasperdean Kobes, Bamboula

Jean-Paul Merlin, As' Art

Leslie Mittleburg, Swahili Imports

Lorin Strieman, The Gallery Shop

Pascal Schrader, Sikatonga

Tim Kunin, The Hunger Site

Yvonne Miles, San Diego Zoo

Yunib Siddiqui, Besmo

Consultants

Frederic Alcantara

Carol MacNulty

Magda van der Vloed

Patti Carpenter

Thierry Blaise

Partners

Marisa Fick-Jordaan, BAT Shop General Manager

Gwyn Daniel, BAT Shop Assistant Manager & Product Designer

Erica Elk, CCDI Director

Malin Olofsson, CCDI Product Development Trainee

Cathy Wijnberg, CCDI Market Development Manager

Frikkie Meintjes, Phumani Paper Executive Director

Eustacia Zitha, Phumani Paper Product Development Trainee

Ntabiseng Phiri, Phumani Paper Product Development Trainee

Artisans

BAT Shop artisans

Solomon Sima

Sandile Nzimanda

James Mtungwa

Nambuso Nzimanda

Jaheni Mkieze

Zeni Masina

CCDI Artisans

Willard Musarurwa, Feeling Africa

Luyanda Mari, Kunya Crafts

Pam Xapa, Kunya Crafts

Derek Sentinin, Sentini Creations

Sharon Overmeyer, Zambane

Winston Rangwani, Street Wires

Rina Swanepoel, Wala-Nani

Magdel Van Der Walt, Tin Town

Andra Serfontein, Tin Town

Kent Brown, Cape Tewn Society for the Blind

Mozambican Other

Victor Sala, Escola De Artes Visuais

Sra. Otilia, Comercio Justo

Novoa, Cantinho Dos Artesaos

Dulce, Maciene Association

Mondlane, Artes Mondlane

Zine Neto, Prodaz

Cassimo, Nampula Artisan

ATA Staff (all involved in project implementation)

Abel Dabula, Mozambique Country Coordinator

Abel Magibire, Mozambique Provincial Business Coordinator

Barbara Czuprynski, Marketing Director

Chila Lino, Mozambique Marketing Manager
Evaristo Madime, Mozambique Country Director
Frances Potter, ATASA Trust Director
Fred Cote, Senior Finance Officer
Karen Gibbs, VP Marketing
Lane Pollack, Senior Program Director
Lisa Yoreo, Program Officer
Lorraine Johnson, Africa Regional Director
Mary Cockram, Program Director
Suzanne Carnes, Training Manager

Annex 1.7 DIP Matrix and Results Status Table

DIP Objective	DIP Indicator	Baseline	Targets		Achieved		Data Verified	Comments
			Midterm	EOP	Midterm	EOP		
HEADQUARTERS								
1. Improve ATA's ability to produce training materials and deliver training to artisans and business partners.	Standard artisan enterprise curriculum and training modules established and accessible to field and headquarters staff by Y2	None	Established and accessible by Y2	Established and accessible by Y2	Completed successfully	Completed successfully	yes	Resources are continually updated
	Use of central training units in the field by Y3	None	Used in field by Y3	Used in field by Y3	Completed successfully	Completed successfully	yes	
	Number of times curriculum used in the field	None	1	1	10	7	yes	Training materials are regularly used by field and headquarters
	Number of trainees that pay to go for training	None	4	7	31% of 91	17% of 52	yes	
2. Diversify and expand ATA's training programs.	Diversification of the AMRP to address separately the needs of mirco-enterprises and SME	None	no targets set	no targets set	Tested	AMRP implemented for Micro and SME in Y4	yes	May 2005 the AMRP was held exclusively the first for SMEs for which several new training modules were developed
	Implement a field-based production mentoring program for small producers in Y2	None	no targets set	no targets set	Activity developed	Completed in Y4	yes	
	Number of (AMRP) participants from outside PAED project countries (no targets set)	None	no targets set	no targets set	20	12	yes	
	Handover the AMRP to the BAT shop in Y4	None	See Country Program	See Country Program	See Country Program	See Country Program	yes	
3. Capitalize on existing information technology	ATA wholesale Internet site developed in Y1	None	no targets set	no targets set	Launched in Y2	Completed successfully	yes	

DIP Objective	DIP Indicator	Baseline	Targets		Achieved		Data Verified	Comments
			Midterm	EOP	Midterm	EOP		
to supplement ATA's marketing efforts and develop product lines cost effectively.								
	400 products on site by EOP	None	200	400	800	1050	yes	
4. Increase ATA's total earned income.	Non-program businesses pay for 30% of Pan-African Market Link trade show expenses by EOP	None	20%	30%	25%	0%	yes	Booth was down sized in final year
5. Expand market and sales opportunities for African artisans.	# of craft businesses with exposure in international trade shows	See Country Program	See Country Program	See Country Program	See Country Program	See Country Program	yes	See Country Program Matrix
	# of (African) products on site	None	200	400	163	239	yes	
	# of new shows for Pan-African craft collection	None	2	4	0	2	yes	
	# of buyer visits per country	See Country Program	See Country Program	See Country Program	See Country Program	See Country Program	yes	
6. Influence public impressions through appearances in trade, consumer and news media.	# of media features promoting Africa as a source of innovative products	2	5	10	4	21	yes	
	# of product placements in a trade publication (catalogue, tradeshow directory)	2	5	10	3	37	yes	
7. Continue to diversify ATA's funding sources and build strategic alliances.	# of new funding relationships developed or renewed with non-USAID funding institutions.	None	15	30	5	21	yes	
MOZAMBIQUE								
1. Strengthen organization of artisan	# of competent exporters available to artisans	None	2	3	1	2	yes	

DIP Objective	DIP Indicator	Baseline	Targets		Achieved		Data Verified	Comments
			Midterm	EOP	Midterm	EOP		
and export sectors and address key weaknesses.								
	# of trained exporters	None	3	4	2	3	yes	
	# of importers by EOP	4	11	15	15	26	yes	
	% of wholesale buyers who re-order within 9 months	50%	75%	75%	28%	35%	yes	the percentage decreased due to new buyers lowering the denominator
2. Provide artisans with business development services.	% of groups with MOU that have a bank account	56%	80%	100%	54%	93%	yes	the percentage decreased due to new artisans lowering the denominator
	% of groups with MOU that keep written financial records	5.5%	20%	50%	61%	81%	yes	
	Business knowledge gained in SA or US MRP program	See South Africa	See South Africa	See South Africa	See South Africa	See South Africa	yes	
	# of artisan enterprises/associations registered with the Ministry of Finance	None	2	5	4	19	yes	
3. Increase the fundraising and financial management responsibility of local staff.	# of local funders identified/developed or renewed by the local staff	None	3	5	3	3	yes	
	# of proposals developed by the local staff (with HQ and RFD)	None	6	10	3	4	yes	
	Local staff managing financial reporting independently by Y2	None	Managed by Y2	Managed by Y2	Completed successfully	Completed successfully	yes	
4. Develop and expand marketing and sales	# of craft businesses with exposure in international	10	25	35	19	2	yes	Emphasis was place on exposure of exporters

DIP Objective	DIP Indicator	Baseline	Targets		Achieved		Data Verified	Comments
			Midterm	EOP	Midterm	EOP		
opportunities for Mozambican artisans leading to revenue generation.	trade shows by EOP							rather than individual craft businesses
	# of businesses with exposure in Mozambican annual holiday fair	10	34	60	18	47	yes	
	Annual local fair sales in USD	\$2,200	\$7,000	\$15,000	\$8,590	\$25,110	yes	
	# of buyers visits	3	6	8	3	8	yes	
	Total cumulative sales by EOP	\$33,000	\$175,000	\$349,074	\$151,104	\$349,074	yes	
5. Scale up and expand the impact of ATA's work in Mozambique.	# of artisans served during the LOP	1,350	2,500	3,000	2,500	3,910	yes	
6. Artisan entrepreneurs continue to reach and expand markets after PAED project ends.	Annual Mozambique craft fair managed locally independent of ATA support	None	no target set	Managed independent of ATA	Not completed	Fair is being managed by CEDARTE	yes	CEDARTE is a local NGO being established by ATA staff in Mozambique
	Maputo wood carvers achieve FSC certification through the Djabula Community Forest Project to promote their product.	None	no target set	no target set	Not completed	Not completed	yes	Established a wood bank during Y3, in Maputo and Nampula, which makes wood from certified forests available to artisans for purchase. IIAM was contracted to conduct reforestation experimentation
7. Artisans able to develop quality products for international export independent of ATA.	# of new product lines accepted in the international market	0	42	70	16	6	yes	
	% of orders that meet buyer quality control standards	60%	75%	85%	70%	62%	yes	

DIP Objective	DIP Indicator	Baseline	Targets		Achieved		Data Verified	Comments
			Midterm	EOP	Midterm	EOP		
SOUTH AFRICA								
1. The BAT Shop to respond effectively to market demands.	% of wholesale buyers place repeat orders (within 9 months)	100%	90%	100%	100%	90%	yes	
	# of buyers visits to South Africa	6	8	10	38	14	yes	
2. Building BAT Shop's operational and training capacity.	Transfer the organization and implementation of the AMRP to BAT shop by Y4	None	no target set	Transfer to BAT	Not completed	Not completed	yes	ATASA Trust will continue to run the AMRP as long as participants and funding demand.
	25 trainees to attend the MRP program by EOP	None	15	25	22	23	yes	
3. ATA builds a network of strategic alliances in South Africa.	Active participation of South African designers to use regional talent in providing design and technical assistance.	None	6	10	5	6	yes	Includes Product Development Trainees
	# of Craft Organizations visited and assessed by EOP	2	13	20	1 (350 represented)	3	yes	
4. The BAT Shop uses ATA website as a marketing tool to supplement BAT's and ATA's marketing efforts.	South African product information section developed by Y1	None	By Y1	By Y1	Completed successfully	Completed successfully	yes	
	# of times key buyers visit the site	None	No target set	No target set	Not tracked	Not tracked	yes	ATA does not have capacity to track this
	# of new buyers through the site	None	No target set	No target set	Not tracked	Not tracked	yes	ATA does not have capacity to track this
	# of email inquiries received	None	No target set	No target set	Not tracked	Not tracked	yes	ATA does not have capacity to track this
5. Develop and expand marketing and sales opportunities for South	Craft businesses with exposure in international trade shows by EOP	3	10	21	19	72	yes	

DIP Objective	DIP Indicator	Baseline	Targets		Achieved		Data Verified	Comments
			Midterm	EOP	Midterm	EOP		
African artisans.								
	Increase in the # of importers	6	8	10	37	82	yes	
	Total cumulative sales of by EOP	\$200,000	\$325,000	\$475,000	\$556,000	\$717,409	yes	
6. Provide artisans with business development services.	% of orders meeting buyer quality control standards by EOP	78%	82%	85%	75%	80%	yes	
	# of artisans served during the LOP	700	1,000	1,250	867	721	yes	
	Business knowledge gained in SA or US MRT program	None	20 point increase	20 point increase	14 point increase	Not completed	yes	Test was discontinued due to inadequacy
7. The BAT shop provides training, design consultancies and market link services to artisans after EOP.	ATA leveraged buyers working directly with the BAT shop on product development and marketing by EOP	None	No target set	By EOP	Not completed	Completed successfully	yes	
8. Artisans are able to develop quality products for international export independent of ATA	# of new product lines accepted in International market	10	25	40	19	10	yes	Emphasis placed on products still attracting sales

Annex 1.8 Partnership Table

Partner Type	Name of Organization	Organization Type	Agreement Type	Role/Main Responsibility	Funds Received from PVO (as a percentage of total income)	Quality and Outcomes of Partnership
Primary in-country partner receiving PVO MG Funds	BAT Shop	For-Profit Enterprise, RSA	MOU	KwaZulu Natal Province implementation partner	3.4%	Provided targeted assistance where needed; collegial peer to peer relationship
Other key partners who do not receive MG funds	CCDI	Local NGO, RSA	MOU	Western Cape Province implementation partner	Funding received independent of ATA	Provided targeted assistance where needed; collegial peer to peer relationship
Other key partners who do not receive MG funds	Phumani Paper	Local NGO, RSA	MOU	Limpopo Province implementation partner	Phumani hired ATA's services	Contracted ATA for services which continue post PAED
Other key partners who do not receive MG funds	ADEM	Local NGO, MZ	MOU	Manica Province implementation partner	Funds managed by ATA	Implementing partner which will continue to provide services in Manica
Other key partners who do not receive MG funds	ACUDES	Local NGO, MZ	MOU	Inhambane Province implementation partner	Funds managed by ATA	Implementing partner which will continue to provide services in Inhambane
Other key partners who do not receive MG funds	Kissange Artesanato	For-Profit Enterprise, MZ	MOU	Exporter	Order funds only	Project exporter to whom ATA will continue to provide support
Other key partners who do not receive MG funds	Artes Mondlane Craft Center	For-Profit Enterprise, MZ	MOU	Exporter	Order funds only	Project exporter to whom ATA will continue to provide support
Other key partners who do not receive MG funds	Associação Cantinho dos Artesãos	Local NGO, MZ	No formal agreement	Assisted with local fair coordination	N/A	Implementation of local fairs
Other key partners who do not receive MG funds	Comercio Justo de Moçambique	International NGO, MZ	No formal agreement	Assisted with local fair coordination	N/A	Implementation of local fairs
Other key partners who do not receive MG funds	National Museum of Arts	Museum, MZ	No formal agreement	Assisted with local fair coordination	N/A	Implementation of local fairs
Other key partners who do not receive MG funds	UNESCO	United Nations	No formal agreement	Assisted with local fair coordination	N/A	Implementation of local fairs

Annex 1.9 – Summary of ATA Home Office Project Debriefing

June 8 and July 6, 2006

Received by evaluation team on July 8, 2006

Notes

I. Project Overview and results (45 minutes)

Objectives of proposed project:

Overall project:

Capacity building objectives

- Increase the operational and training capacity at headquarters and country level
Yes – through SARCD A ATA increased its operational and training capacity. It may not have been 100% correct but it did happen.

ATA didn't institutionally focus on PAED specifically. The project wasn't approached in a systemic way by ATA.

The core grant should have been focused more on the indicators and should have been broken out as separate budget.

Grant was to build ATA internal capacity.

- Capitalize on the existing information technology
Yes – but not specifically for PAED

- Increase ATA's earned income and revenue
We tried RSA based marketing but it didn't work well although there was a small amount of cost share.

We were successful in replicating ATA's Market Readiness Training Program (AMRP)

Service delivery objectives

- Expand market and sales opportunities for African artisans
Yes in south Africa – Bat shop went to SARCD A and increased sales.
In Mozambique - yes but much less sustainable but cost per sale is much higher.
However, we have proven there is great market demand.
- Provide artisans with business training and design assistance
Yes
- Continue to develop market-driven products for and with artisans
Yes. We have found local capacity to do training. Buyers are saying that they don't have inhouse capacity to do design – they look for ATA to do this.

Strengthen regional design activities should be repeated.

Sustainability objectives

- At headquarters level, continue to diversify funding sources and build strategic alliances

The (matching) grant mechanism was very helpful in fundraising and ability to get match funding.

- At country level train artisans and partner organizations to provide effective customer service to commercial markets to maintain and expand markets after the PAED project ends

ATA didn't assist Bat shop with customer service because there were already good at this. Marisa said staff going to AMRP was helpful. There has been a marginal increase in sales at Bat shop. Overall didn't do much.

CCDI - businesses attended AMRP but didn't do much with customer service.

ATA underestimated level of customer service skill at start of project.

Mozambique – ATA did some work with customer service but lack of exporter makes this difficult. However, the artisan businesses have come a long way in Mozambique.

- Strengthen the export sector through training activities, participation in international trade shows and a mentoring process with international buyers

ATA spent a lot of effort in Mozambique but with not as much results. It was not for lack of trying but we fell short in Mozambique.

RSA started at a much higher level.

When/why did ATA take on the role of exporter? ATA expected to be there longer and also was easier to do it. ATA was answering the push from the project funder to deliver and therefore implemented a “stop gap” in order to meet goals of project. It takes time to train an exporter and ATA stepped up in the meantime. Also exporters have to see it as a viable business in order to get interested.

Five people went through exporter training program but it wasn't enough. ATA underestimated what it would take to create exporter.

Lack of English skills was a problem.

There was a push to develop an exporter toward the end of the project.

ATA needs to determine when to decide that we are not doing enough to develop exporters or we are doing too much – and when we need to step back and let something grow.

- Train artisans to develop quality products for international export independent of ATA

There is some disagreement on this. Some staff feel that the project significantly increased creativity and product development ability. Others feel that improvements were only modest and that a lot of the product development is only variation on current designs.

Mozambique (please refer to attached PAED Planning Matrix)

- Strengthen organization of artisan and export sectors and address key weaknesses
- Provide artisans with business development services

Yes – provided by ATA. The project added numerous skills, etc.

- Increase the fundraising and financial management responsibility of local staff
To some extent. Over the past five years the local staff has developed a lot of skills. Evaristo is now the primary contact for Ford and Kellogg, and he wrote some proposals. There was a big improvement in financial responsibility. What ATA Home Office could expect from the Mozambique office has improved.

- Develop and expand marketing and sales opportunities for Mozambican artisans leading to revenue generation

- Scale up and expand the impact of ATA's work in Mozambique
Not very much geographically. The project goal wasn't to expand. We have not expanded number of artisans working with. However, the ability to produce has to increased modestly.

- Artisan entrepreneurs continue to reach and expand markets after PAED project ends
- Artisans able to develop quality products for international export independent of ATA

South Africa (please refer to attached PAED Planning Matrix)

- The BAT Shop to respond effectively to market demands -
- Building BAT Shop's operational and training capacity.
- ATA builds a network of strategic alliances⁴ in South Africa

Very limited - less than what ATA envisioned.

- The BAT Shop uses ATA website⁵ as a marketing tool to supplement BAT's and ATA's marketing efforts.

Internet commerce has changed so much that this question is somewhat irrelevant. However, this was accomplished to a limited extent. ATA's website increased a lot as marketing tool over the life of the project. A lot of people now have access to RSA products via the ATA website.

⁴ Strategic alliances with designers, exporters, producers and craft organizations to build a functional regional network.

⁵ The site will serve as a marketing tool to expand reach to buyers that are not reachable through trade shows.

- Develop and expand marketing and sales opportunities for South African artisans.
We haven't tapped in to market as much as could.

- Provide artisans with business development services

Yes

- The BAT shop provides training, design consultancies and market link services to artisans after EOP

Yes – but it was also being done before the project.

- Artisans are able to develop quality products for international export independent of ATA

Yes

Please refer to attached PAED Planning Matrices for details on proposed activities, indicators, and proposed measurement and data management methods.

QUESTIONS:

1. Did ATA accurately assess the overarching problem that the substantial potential individual incomes and contributions to African economies were not being realized in the Mozambique and South Africa artisan sectors?

ATA did assess correctly but we did not fully understand. Both countries have a lot of potential. The challenges and potential were/are different in each country. The fact that ATA had been working in the region was helpful to ATA to assess the problem.

2. Was ATA's solution, reaching 3,700 artisans and generating \$3 million in sales, an appropriate response to the problem as described above?

RSA is above sales goal. Mozambique is on track. Tanzania was over sales.

The solution ignored the lack of exporter/exporters in Mozambique. ATA underestimated the ability to develop exporter and didn't implement activities geared toward this end.

The project reached targets but not in a sustainable way in many cases.

Indicators were not broad enough.

3. Were the program's objectives achieved fully, partially, or not at all? Why and/or why not?

Some were some weren't. See above

4. What were the major successes of the project?

The creation of awareness of Mozambique craft in the international market.

The belief of artisans that crafts are viable.

The project diversified ATA's fundraising skills.

The project enabled ATA to expand to a new market – not the US or Europe.

Successful replication on the MRP to another place.

5. What did not go as planned?

No Mozambique exporter establishment

A strategic alliance in RSA didn't come together. ATA didn't understand complication of sector and relationships in RSA and didn't have enough resources focused on this. We underestimated the challenge.

In RSA the lack of a country office/director and/or the lack of a local PAED project director encumbered a lot of decision making.

ATA as an organization did not competently capture PAED project-specific training materials.

The pre-project assessment was missed some important points/areas.

6. Are there any important outcomes of PAED that were not planned for?

Wood sustainability issue – started to address reforestation efforts with local organizations.

The establishment of the SA Trust

7. What partnerships were made through the project? How did those partnerships benefit and/or impede the project?

RSA

CCDI – more problematic than expected. Started on good note – didn't go as well. Had access to groups and networks that we wouldn't have access to without CCDI.

Bat Shop – helped make network connections, put design together. Impediment – some people didn't have a good impression of Bat shop so didn't have good impression of ATA. One funder wouldn't fund Bat shop activities.

Phumani Paper – this is new relationship so not a lot of feedback at this point.

Mozambique

School of Visual Arts

There were not a lot of partnerships. Most things were done by ATA.

II. Marketing (30 minutes)

QUESTIONS

1. What were the major successes in marketing efforts/activities of the PAED program?

SARCD, RSA local market, As Maos was relatively successful in Mozambique, buyer trips, export contacts in Mozambique and RSA, committed buyers, marketing reps, NYIGF/Tendence good for contacts.

2. What were the major obstacles in marketing?

Production capacity, lack of exporter, exchange rate in SA – which also affected Mozambique.

3. What could we have done differently?

Resisted push by funders to move to other areas of Mozambique and stuck to Mapula and made it work.

Could have had more activities in South Africa for local market.

4. What were the major lessons learned (good and bad)?

Need knowledge of market and someone with contacts to sell in market.

Can sell successfully in local market.

Regional market in Mozambique is sustainable.

Bought large expensive tools and equipment and they have not been used because artisans were not taught how to use, couldn't be repaired in Nampula, not strong enough to cut wood. (not the right kind of tools). ATA needs own internal report of this.

5. What international and local consultants contributed to the project? What were the results?

Frederic Alcantara - design/merchandising very marketable. Fred's relationship with artisans is good. Questions on issues such as flammability, etc. Could have done better on technical assistance.

Stephen Burkes is a designer not product developer so there were issues on pricing resulting from his consultancy.

Magda produced some interesting designs.

Rufus – good use of tools.

Terry Blaze – technical training but not good usage after.

In the future, ATA should look at combination of designer and merchandiser/product developer. Need to better assess needs of groups far enough in advance to get right consultant.

6. Was there a major constraint in exporter development? Yes in Mozambique. In RSA to a limited extent – CCDI still looking for exporter. Did PAED make a difference? Modestly. ATA made an attempt – made steps forward but there is still a lot to do. Why? In Mozambique – related a lot to the context of how you would do business. Not a lot of interest in exporting. Dealing with artisans is not appealing because of the required follow-up. Not big margins and a lot of risk.

7. What training programs were implemented? AMRP, regional business workshops in Mozambique, export mentoring program, other workshops; costing in pricing in South Africa. What were the results (success, difficulties, etc.)? What would we do differently?

We didn't do enough of sending people to production sites and to exporters. ATA doesn't have understanding of regional workshops and whether they produce results.

We should have focused more on production earlier.

Carol MacNulty's business planning consultancy should have happened early.

ATA should have gotten out of the loop earlier.

8. Do you think the link between importer and producer was strengthened? If so, in which way? If not, why not?

Yes – but it should have happened sooner and they still need a long-term commercial link in Mozambique.

RSA – yes

9. In your opinion, are artisans more capable of sustaining/growing their businesses (develop marketable product lines, maintain current and create new market links, and manage their business and finances) than before the PAED project?

Absolutely in Mozambique for improved product. The artisans are on the track to doing businesses and are more capable than before.

True in RSA in relation to CCDI. Not as much for BAT shop.

III. Fundraising/Development (20 minutes)

QUESTIONS

1. In what areas were we successful in raising funds for the project? Could we have done something differently in order to have a higher rate of success?

We met our match in 2004. (6th year of combined RISE-PAED project). We did pretty well – it grew exponentially. Could have focused more on mentoring staff on fundraising. However, strength of Mozambique staff was not in this area although there have been a lot of improvements.

Being able to identify specific themes that appealed to various donors was helpful. PAED was the first choice for ATA funders for a long time but that changed over time. We were nervous about meeting the match in the first stage of the project and once it was reached then we relaxed and concentrated funding in different projects. Priorities shifted and there was less of an organizational stress on southern Africa.

In the last year there was not enough effort to raise additional funds to carry on the project. This was partly because there was no strategy for the region for a long time.

Information organization regarding funding was not centralized.

2. What “sold” the project to funders?

ATA’s track record. Particularly for Ford.

The fact that it was partially funded.

Mozambique flood.

October Hill – wood issue.

Ford – environmental issues

AMRP and local fair was appealing to Kellogg.

Participation in trade show was a big selling point.

Funders responded well to scope creep.

Kellogg – was enthusiastic about transfer of mgmt to local team (from Lorraine)

3. How is our relationship with the major funders – USAID, Ford, Kellogg, Ewing, West, SA gov’t, UMCOR, UNESCO? (note – funders will be interviewed for the final evaluation)

Project has helped us as a spring board for additional work and relationship building and additional funding for ATA.

Matching grant pushed us to do relationship.

This project was ATA’s first matching grant.

Kellogg positive

Ford positive

Ewing positive.

All positive with exception of one person.

Mozambique mission fairly handsoff because it was Washington grant.

Mission Director told CTO that they could not spend time on ATA project.

South Africa relationship fairly neutral but nothing fantastic.

4. What did we learn about managing a multi-funder budget?

How to manage scope creep.

The tools that are needed to manage multi-funder/multi-project budget were developed.

Don’t break out the core budget. (core budget = home office expenses, some marketing).

Need monthly projections to manage budget.

Still need to improve ability to do gap analysis and need tools to do so.

There is a lot more funder management to do with a multi funder budget such as report writing, etc. A lot of times small grants can cost just as much or more to manage.

IV. Project Management (25 minutes)

QUESTIONS

1. How did the structure of the project management team work? There was a lot of staff change in the home office. The field offices grew a lot. We could have done a better job at thinking through the evolution of staff during the project. What could we have done differently? Made sure that people have the appropriate skills for certain positions and how to make up for that gap if they don't have it.

Financial management and home office coordination needed to be stronger. Started project in field with only one person (Lorraine) – not enough.

Two separate project leads managing one project (budget). A lot of disconnect between the home office budgets and field.

Need single integrated financial system for all ATA offices (field and home office)

2. Did ATA choose good locations for country offices? Why/why not?

Yes for Maputo. RSA Joburg good for office – we should have budgeted more for individual office.

3. Did ATA choose good locations to work?

For Mozambique we were a little ambitious as to what we could do – geographic mission creep. We need to be careful that we assume that the project lead always knows best. However overall we chose ok places to work although some places we were not able to do a good job.

RSA we didn't focus on expanding to other partners because we were too attached to Bat Shop.

4. How was the relationship between the home office and field office? How could it have been improved?

We worked on it a lot. Face to face visits are really important. Staff travel important – shouldn't let it slip. Need to sit down face to face.

Feeling that field office thought it took a long time to get responses from HO. Not always clear path to get approval for some things.

Program Director flux was problematic.

Language difficulty in Mozambique – both lack of Portuguese in Home Office and lack of English in Mozambique.

Financially in general it worked fairly well.

Complicated because there was a lack of a planned progression for RSA. A lot of field office functions happened in the home office. Made for a logistical challenge.

5. What were the major obstacles to program management? What worked well?
Turn over in staff was hard. Face to face visits very important. Lack of clear decision making structure was problematic. Lack of clear plan in some aspects was difficult.

6. How did ATA monitor results?
Indicators need to be clearly defined from the beginning so there can be no misinterpretation from one year to the next. We learned this under RISE and we tried but it still didn't work. We didn't establish collection systems clearly enough. Need to better train data collector.

What were the key tools used in M&E? DIP, data collection worksheets (not easy for the field to use), pre-post test – we weren't very happy going into it. In general indicators were better defined than the average ATA project. Some indicators were confusing. Indicators were potentially too complicate. For example - % of wholesalers that reorder within 8 months. Needed more consistency and understanding of M&E process.

How did M&E information/results assist ATA in steering the project? To a limited extent – except for sales. Concentration on sales drove a lot of decisions. There was a concentration on meeting indicators instead of analyzing whether the indicators were appropriate for the project. It would have been good to have uniform indicators across funders.

1 - 100% unsatisfied

10- 100% satisfied

na - not applicable to you

About PAED Implementation rank the following:

Project design appropriateness - 8

Project output/indicators appropriateness - 8

Project implementation satisfactoriness - 7

Quality and timeliness of communication and reporting - 7.5

Fiscal management satisfactoriness - 6

Project management satisfactoriness - 7

Project cost effectiveness - 7

Consulting Appropriateness - 8

Overall satisfaction - 7.5

Annex 2.1: BAT Shop Sales

May 2005 – May 2006⁶

Regional Breakdown of Sales in Rand

South Africa	R1,828,000.00
USA	R1,474,000.00
EU	R 533,000.00
Australia, New Zealand, Canada	R 116,000.00
Africa	R 29,381.00
Middle East	R 3,000.00

South African Sales Breakdown in Rand

BAT Centre	R 460,000.00
Singita Lodge	R 368,000.00
Other Retailers	R 350,000.00
Corporate Gifts	R 180,000.00
Wholesalers	R 64,000.00
Other lodges	R 63,000.00
Interior Designers	R 55,000.00

ATA Sales in Rand

SARCDA 2005	R 26,740.00
ATA direct	R 28,000.00

⁶ Dates chosen in order to include impact of SARCDA NEW YORK GIFT FAIR and AMBIENTE

Annex 2.2 – SARCD A Sales

Aid to Artisans

SARCD A booth sales 2002 - 2006

Table 1: FOB in US Dollars

Producer Group/Country Program	2002	2003	2004	2005	2006	Total sales
Mozambique (ATA various groups)	\$4,834	\$7,688	\$5,236	\$12,000		\$29,758
South Africa (BAT Shop)	\$15,900	\$26,398	\$18,462	\$16,205	\$28,036	\$105,001
South Africa (Wetlands)		\$14,744	\$20,000			\$34,744
South Africa (CCDI)				\$4,295	\$4,775	\$9,070
South Africa (Rorke's Drift)				\$3,985		\$3,985
South African (Phumani Paper)					\$3,880	\$3,880
Tanzania (Marvelous Batik, ADAT, Mikono, MOTO)	\$50	\$2,043	\$1,098			\$3,191
Ghana (African – Dream)	\$475					\$475
Zambia (Choma, Kubu + Moore Pottery)		\$4,829				\$4,829
Total	\$21,259	\$55,702	\$44,796	\$36,485	\$36,691	\$194,933
Square meterage of booth	24 square meters	64 square meters	64 square meters	64 square meters	48 square meters	
Rate of exchange	(exchange rate 1USD: = 10Rand)	(exchange rate: 1USD = 7.8Rand)	(exchange rate 1USD: = 6.5Rand)	(exchange rate 1USD: = 6.5Rand)	(exchange rate 1USD: = 7Rand)	

Table 2: Wholesale in South African Rands

Producer Group/Country Program	2002	2003	2004	2005	2006	Total sales	Total in US\$
Mozambique (ATA various groups)	R 96,682	R 110,755	R 66,384	R 136,615		R 410,436	\$58,633.73
South Africa (BAT Shop)	R 158,996	R 205,907	R 120,000	R 103,653	R 196,255	R 784,811	\$112,115.86
South Africa (Wetlands)		R 115,000	R 130,000			R 245,000	\$35,000.00
South Africa (CCDI)				R 27,916	R 33,424	R 61,340	\$8,762.86
South Africa (Rorke's Drift)				R 25,903		R 25,903	\$3,700.36
South African (Phumani Paper)					R 27,162	R 27,162	\$3,880.29
Tanzania (Marvelous Batik, ADAT, Mikono, MOTO)	R 500	R 27,500	R 12,649			R 40,649	\$5,807.03
Ghana (African – Dream)	R 14,240					R 14,240	\$2,034.29
Zambia (Choma, Kubu + Moore Pottery)		R 69,590				R 69,590	\$9,941.47
Total	R 270,418	R 528,753	R 329,033	R 294,087	R 256,841	R 1,679,131	\$239,875.87
Square meterage of booth	24 square meters	64 square meters	64 square meters	64 square meters	48 square meters		

Annex 2.3 – AMRP Participants

AMRP breakdown 2002 - 2006

Breakdown by partner and organization

	Men	women
South Africa		
BAT shop	3	10
CCDI	8	6
Phumani		5
Other South Africans	7	11
Mozambique	15	7
Tanzania	2	5
Ghana	6	1
Kenya	1	2
Rwanda		1
Uganda	1	
Lesotho		4
Zim/SA	1	
Zambia	2	1
Botswana		1
Madagascar	1	1
Totals	47	55

Annex 3.1 – Mozambique Artisan Questionnaire

Para os artesãos e suas empresas (assinala a palavra ou escolha certa com uma bola e preencha os espaços em branco) antes de iniciar, fazer uma pequena introdução sobre o motivo desta pesquisa, e garantir que todas as respostas mantém o anonimato:

1. Código: ____/____/____ Hora Início: _____ Hora Fim: _____
 2. Idade: _____ Sexo: HOMEM / MULHER
 3. sente-se confortável de falar em português: SIM / NAO
 4. Sabe ler? SIM / NÃO b) sabe escrever? SIM / NÃO c) faz contas de aritmética básica? SIM / NÃO
 5. Que língua prefere usar durante o questionário?: _____
 6. Qual foi a última classe (escolaridade) que frequentou? _____
 7. Quantas pessoas tem o seu agregado familiar (AF) consigo incluído? _____
 8. qual a sua posição no AF? a) Chefe Família: SIM / NÃO b) Dependente: SIM / NÃO
 9. Quantos membros do AF produzem obras de artesanato consigo incluído? _____
 10. Além do artesanato tem mais alguma actividade aonde tem de despender tempo? SIM / NÃO
a) se sim, qual? _____
 11. Quais as duas actividades que trazem maior proveito para o seu AF (+ importante primeiro)? 1. _____ 2. _____
 12. Qual actividade para si traz mais dinheiro? _____
 13. Quanta horas por dia dedica dedica ao artesanato? _____ b) Quantos dias por semana? _____
 14. Quantas pessoas no AF contribuem para o rendimento da família consigo incluído? _____
 15. Há quantos tempo trabalha como artesão (anos)? _____
 16. Como adquiriu as habilidades de artesanato?: a) de membros da família: SIM / NÃO b) com outros artesãos: SIM / NÃO c) treino formal (seminários ou workshops, escola de artes): SIM / NÃO
 17. Tu garantes o sustento principal “ganha pão” da família? SIM / NÃO
 18. Se comparar com a sua situação em geral em 2001 como se sente hoje? a) pior b) na mesma c) Melhor: SIM / NÃO
 19. Acha que o artesanato tem contribuído para a melhoria do seu rendimento? SIM / NÃO
 20. A casa onde vive é: a) própria b) dos familiares c) Aluga?
 21. tem energia eléctrica dentro de casa? SIM / NÃO; b) tem agua canalizada dentro de casa?: SIM / NÃO
 22. tem telefone pessoal? SIM / NÃO
- (NOTA: só estamos a avaliar o trabalho da pessoa como artista)
- Características da pessoa / empresa antes e depois do projecto ou de uma certa data
23. antes de 2001 como trabalhava: a) sozinho: SIM / NAO b) empregado c1) membro de associação c2) quantos membros tinha? _____ d1) Patrão com

empregados? SIM / NÃO d2) quantos empregados tinha: _____ e) o seu negocio está legalizado? SIM / NÃO

24. como trabalha hoje: a) sozinho: SIM / NAO b) empregado SIM / NÃO c1) membro de associação SIM/ NÃO c2) quantos membros tem a associação? _____ d1) Patrão com empregados? SIM / NÃO d2) quantos empregados tem: _____ d2) esta legalizada: SIM / NAO

25. Tem um salário fixo? a) é pago por obra? b) é pago á hora?

26. Qual era a sua actividade principal antes de 2001?

MUITO IMPORTANTE! É NECESSARIO QUE OS ENTREVISTADORES PERCEBAM A

DIFERENÇA ENTRE OS DIFERENTES TIPOS DE APOIO PELO PROJECTO PAED DA ATA.

DEVES FALAR COM O ESCRITORIO PARA CERTIFICAR ESTE ASPECTO, PODE SER SEGUNDO

O TIPO DE APOIO DA ATA?

27. Em relação á ATA você é? a) beneficiário directo da ATA (PAED): SIM / NAO. b) beneficiário indirecto da ATA (PAED): SIM / NAO. c) você é não-beneficiario da ATA: SIM / NAO

28. **(somente para aqueles que tiveram apoio da ATA, beneficiários directos e indirectos)**

a) desde de 2001 recebeu algum apoio da ATA? SIM / NÃO b) se sim quem geralmente contactava consigo:

29. **(para os não-beneficiários da ATA)**

a) Desde 2001 recebeu algum apoio de fora? SIM / NÃO

30. Que materiais usava nas suas obras antes de 2001? (e.g., têxteis, madeira, marfim, palha, ossos chifres, etc)?

31. Usava alguma técnica ou ferramenta especifica? SIM / NÃO a) se sim qual / quais? _____

32. Quantos produtos / obras diferentes produzias antes de 2001? _____

33. Que materiais usa agora nas suas obras: _____

34. Acha que desde 2001 até hoje melhorou a sua técnica e ferramentas para o seu trabalho? SIM/ NAO b) o que foi importante para esta melhoria?

35. como pode caracterizar o grau de acesso a matéria prima para o seu trabalho de 2001 a 2006?

- a) agora é mais difícil b) não mudou c) agora é mais fácil o acesso
36. Como consegue os seus materiais básicos: b) paga pela matéria prima: SIM / NAO c) tem uma licença de aquisição: SIM / NAO
37. A matéria prima que usa são de boa qualidade? SIM / NÃO
38. Se usa Madeira, a mesma é adquirida de onde?

-
- a) acha este método de aquisição bom? SIM / NÃO
39. existe alguma coisa especifica que faz para melhorar o uso da matéria prima? SIM / NÃO
- a) se sim o que faz? _____
40. Quantos produtos / obras diferentes consegue produzir hoje? _____
41. Como recebe instruções / informação / ideias para desenvolver os produtos?
- _____

-
- a) de quem recebe esta informação?
-
42. consegues implementar / incorporar as instruções / ideias nos teus produtos / obras? SIM / NÃO
- a) se não consegues, explica porquê?
- _____
- _____

-
43. Pensas que o apoio no desenvolvimento dos teus produtos / obras ajudou a aumentar as vendas? SIM / NÃO. a) se não ajudou, qual foi o problema? _____
- _____

-
44. pensas que as técnicas e ferramentas que usas hoje ajudaram a melhorar as tuas habilidades? SIM / NÃO

45. Tu produzes as tuas obras: a) regra geral em casa? SIM / NÃO b) numa oficina fora? SIM / NÃO. b1) se sim de quem: _____

46. Tens oportunidades de interagir com outros artistas? SIM / NÃO a) se sim, quem geralmente promove esta troca de experiência?
- _____

-
47. Recebeste algum treino para gerir o teu negocio? SIM / NÃO a) tens alguns módulos de treino contigo? SIM / NÃO b) estes módulos são fáceis de usar? SIM / NÃO

48. que outro treinamento / formação recebeste:
- _____

- a) lembras onde foi? _____ b) quem promoveu? _____
- c) que treino / formação contribuiu mais para o teu trabalho: _____

- d) consegues implementar a tua aprendizagem? SIM / NAO e) se não, porque? _____
- _____ f) sentes que tens capacidade de continuar sozinho sem apoio?: SIM / NÃO g) o que achas que é o ponto fraco do teu negocio hoje?
-
49. Tens uma conta bancaria? SIM / NÃO a) consegues ter poupanças: SIM / NÃO
50. Comparado a 2001 sentes que as vendas de produtos: a) diminuiu b) esta na mesma c) aumentou
51. Comparado com 2001, o teu rendimento do artesanato: a) diminuiu b) esta na mesma: c) aumentou
52. Quem é o teu maior cliente?
-
53. onde e como encontrou ou entra em contacto com este cliente?
- a) tem clientes regulares? SIM / NÃO b) como sabes que obras deves fazer _____
-
54. Como consegues colocar preço numa obra?
- a) como calculas o custo do teu produto?
- _____ b) quais são os 3 custos maiores do teu produto final?
- _____ c) qual o maior problema para aumentar as vendas?
-
55. Como os clientes sabem acerca das tuas obras?
-
56. Tu usas um ponto de venda comum? SIM / NÃO. a) onde? _____ b) qual a regularidade? _____
57. participas em feiras de arte em Moçambique? SIM / NÃO. a) lembras de quais feiras (nomes, Locais)? _____
- b) tiveste algum apoio: SIM / NAO b) se SIM, que tipo de apoio: a) financeiro: SIM / NÃO b) lugar ou tenda gratuita: SIM / NÃO c) transporte gratuito para a Feira: SIM / NÃO d) quem te apoiou?: _____
-
58. participas em feiras de arte internacionais (fora de Moçambique)? SIM / NÃO. c) lembras do nome destas feiras? _____ d) tiveste algum apoio: SIM / NAO b) se SIM, que tipo de apoio: a) financeiro: SIM / NÃO, b) lugar ou tenda gratuita: SIM / NÃO c) transporte gratuito para a Feira: SIM / NÃO

d) quem te apoiou?:

59. de todas as feiras onde participaste qual delas ofereceu a melhor oportunidade de negocio?

60. fazes divulgação, publicidade, “marketing” dos teus produtos? SIM / NÃO.
a) alguém te ajuda no marketing? SIM / NÃO b) se sim quem?

61. Onde vendes geralmente os teus produtos? a) casa: SIM / NAO b)
envio especial por encomenda do cliente: SIM / NAO c) Venda a Grosso: SIM /
NAO d) Vendedores de Estrada: SIM / NAO. e) Feira local cada semana:
SIM / NAO f) outros especifica

62. exportas produtos? SIM / NÃO a) quem te apoia na
exportação? _____ b) desde de quando exportas? _____ c)
para onde exportas? _____

63. Aprendeste algumas técnicas de embalagem para as tuas obras: SIM / NAO
a) tu embalas os teus produtos: SIM / NAO. b) segues as recomendações:
SIM / NAO

64. Tens rejeições de obras? SIM / NÃO. a) tens produtos que não são
vendidos? SIM / NÃO b) é significante o numero de obras que não tem saída?
SIM / NAO

65. desde 2001 o seu numero de clientes tem: a) diminuído b) esta na
mesma c) tem aumentado

66. Costuma ter varias encomendas para o mesmo produto / obra? SIM / NÃO

67. Costuma ter encomendas dos mesmos clientes? SIM / NÃO

68. estas satisfeito com as tuas vendas? SIM / NÃO

69. recibes o boletim :“As Mãos Falam”? SIM / NÃO. a) se sim, tem sido útil para o
teu negocio? SIM / NÃO b) com que regularidade recebe o boletim?

70. recibes visitas para apoio ao teu negocio? SIM / NÃO. a) quem te visita/
apoia? _____
b) são visitas regulares? SIM / NAO c) que regularidade? _____ d)
quanto tempo passa a visita contigo? _____ d) achas que as
visitas são úteis para o teu negocio? SIM / NÃO

71. conheces alguma forma de registar as tuas transações comerciais (custos,
encomendas, endereços dos clientes, etc) SIM / NÃO; a) que transações tu registas?

b) onde registas isso? _____ c) precisas de pagar taxas /
impostos? SIM / NÃO d) que taxas:

72. estás contente com o apoio que recibes de fora? SIM / NÃO

73. Qual é a sua necessidade maior? _____ b)
achas que o apoio que recibes vai nessa direcção? SIM / NAO

74. Gostarias de comentar algo mais?

Comentários do inquiridor:

Annex 3.2 - Summary of Mozambican Stakeholder Opinions

Vários encontros com intervenientes no sector e opiniões sobre o PAED em Moçambique.

RELATORIO SOBRE O ENCONTRO ENTRE A EMPRESA VERDE AZUL E PARCEIROS

Este relatório surge com base num questionário de avaliação pedido pela Organização AID to ARTISANS (ATA) à empresa de Consultoria VERDE AZUL. Para tal conversámos com o Sr. Victor Sala, Director da ESCOLA DE ARTES VISUAIS e com a Sra. Otília responsável directa de uma associação denominada COMERCIO JUSTO.

De se notar que estas conversas ocorreram em tempos diferentes, e tinham como temas principais:

- Como iniciaram esta Parceria?
- Em que consiste esta parceria com a ATA?
- Como esta parceria ajuda o artesão?
- Esta parceria funciona? O que poderia melhorar?

Para começar convém salientar que o COMERCIO JUSTO é um “grupo de trabalho”, com dezoito meses. Mas que no entanto já lidava com o mercado há três anos e meio aproximadamente. Assim sendo, e como Comercio Justo houve um primeiro encontro através de um contacto com o Museu de Arte em que se pretendia organizar uma Feira. Uma vez que a ATA já estava e era conhecedora no mercado, houve uma proposta de uma acção conjunta a nível de organização de feiras principalmente.

O Comercio Justo também dá formação e capacitação aos artesãos, sendo estes um grupo já específico e delineado anteriormente, quando esta Organização ainda não era conhecida como o é actualmente. Quanto à assistência prestada ela passa por:

- capacitação (gestão de negócios, mais parte técnica)
- participação em feiras
- exportações
- apoio na aquisição de instrumentos

Esta parceria consiste principalmente na Ligação ao mercado, que neste caso específico passa por haver uma troca de informações. Estas informações consistem sobretudo na divulgação de feiras criadas ao longo do ano por ambos.

Esta troca de informações proporciona ao artesão uma maior variedade de lugares, onde pode não só mais facilmente aumentar a divulgação do seu produto, mas também adquirir novas e diferentes ideias a diferentes níveis. Por exemplo a nível de design de peças diferentes (workshops), de contactos com potenciais clientes, troca de ideias com outros artesãos e mais.

Quanto à Escola de Artes Visuais esta surge em 1983 e contava inicialmente com três cursos, Têxteis; Cerâmica e Artes visuais pois o principal objectivo era o de formar designers. Para colmatar uma das lacunas existentes surgiram mais dois novos cursos, o de Formação de professores e o de Artes e Grafismo.

No caso da parceria da ATA com a Escola de Artes Visuais, esta data de 2003 através de um concurso de melhor Designer posto em pratica pela ATA. Desde então que este contacto se têm mantido, através de Seminários de temas diversos relacionados com o processo de produção e não só, mas também sobre técnicas e design.

O que acontece é que sempre houve uma maior incidência quanto ao produto final em si, sem esquecer no entanto o processo todo em si de um modo geral. Para tal há uma ideia de adicionar mais três componentes aos cursos, Marketing, Design e Gestão de Negócios. Estas já existem mas dadas “por alto”, pretende-se aqui criar disciplinas específicas que fortaleçam o formado.

O objectivo é o de incidir mais no desenvolvimento do próprio processo em si, com particular ênfase no desenvolvimento final do produto, analisando todo o processo desde o artesão até o mercado.

Esta ideia surgiu com a ATA depois de analisadas as componentes curriculares da escola actualmente. Pois além de “produzir” artesãos pretende-se também que os formados surjam no mercado já com um conhecimento que os incentive a continuar no ramo. Para tal há que os dotar de conhecimentos mais aprofundados e realistas, daí os formadores serem pessoas dotadas de conhecimentos reais do processo de produção e de Design.

Esta parceria tem resultado e muito bem como se pode comprovar pelo número de casos de sucesso da escola. Ha jovens que não são só recrutados para empresas diversas, mas também aparecem outros que vêm mostrar os seus cartões de visita e com negócios criados. Ambos os cursos têm fácil aceitação.

O Cantinho dos Artesãos e Artesãos Maciene

Para tal conversámos com o Sr. Nóvoa um dos sócios da Associação “Cantinho dos Artesãos” e com a Sra. Dulce responsável directa de uma associação denominada MACIENE.

De se notar que estas conversas ocorreram em tempos diferentes, e tinham como temas principais:

- Em que consiste esta parceria com a ATA?
- Como esta parceria ajuda o artesão?
- Esta parceria funciona? O que poderia melhorar?

Esta parceria consiste principalmente na Ligação ao mercado, que neste caso específico passa por haver uma troca de informações. Estas informações consistem sobretudo na divulgação de feiras e workshops criados ao longo do ano por ambos, tanto pelo Cantinho dos Artesãos como a ATA.

Esta troca de informações proporciona ao artesão uma maior variedade de lugares, onde pode não só mais facilmente aumentar a divulgação do seu produto, mas também adquirir novas e diferentes ideias a diferentes níveis. Por exemplo a nível de design de peças diferentes (workshops), de contactos com potenciais clientes, troca de ideias com outros artesãos e mais.

Esta parceria funciona no sentido em que se criam condições de facilitação para o artesão, facilita-se a sua interacção no meio incentivando deste modo não só o aumento das obras, o seu aperfeiçoamento, melhoria de técnicas mas o que consideramos um aspecto de realçar é o facto de passar a ter o reconhecimento como um meio capaz de gerar rendimentos a fim de proporcionar uma melhoria nas condições de vida.

Sendo este um projecto “novo” para ambos, com o tempo surgirão novos desafios e constrangimentos. De se notar que estas iniciativas só beneficiam o mercado no geral, não só a nível do reconhecimento de produtos feitos em Moçambique, mas também o relançar/estimular um sector já de si muito debilitado e sem apoios.

Só deste modo se poderão colmatar certas lacunas tais como por exemplo um artesão ter uma certidão não de artesão mas sim de promotor de artesanato passada pelo Ministério da Cultura o que lhe permite negociar artesanato, fazendo com que este não necessite de uma licença do Ministério do Comercio para comercializar o seu produto e não só. Deste modo ainda ha muitas lacunas e resolver e um mercado a regulamentar.

Desta forma pensamos que muito poderia melhorar, mas primeiro há que se organizar a base para só depois crescer e ai sim a parceria funciona.

RELATORIO SOBRE O ENCONTRO ENTRE A EMPRESA VERDE AZUL E EXPORTADORES

Este relatório surge com base num questionário de avaliação pedido pela Organização AID to ARTISANS (ATA) à empresa de Consultoria VERDE AZUL.

Para o devido efeito falamos com dois dos 3 exportadores que beneficiaram da formação da ATA, no que concerne às exportações. Mais propriamente o Sr. Mondlane - ARTES MONDLANE, e o Sr. Zine Neto – PRODAZ.

Esta conversa teve como temas principais:

- Como soube da ATA?
- Recebeu alguma formação da ATA, em que consistiu?
- Como surge esta parceria com a ATA?
- Encurtou a relação com o artesão? E com o mercado?
- Esta parceria funciona? O que poderia melhorar?

Souberam da ATA pois eram artesãos e numa das feiras que frequentavam, foram convidados a fazer parte de uma acção de formação a custo zero. Esta formação consistiu principalmente num curso de Marketing, exibição do produto, embalagem, gestão do produto e calculo de custos.

Esta parceria surge logo incentivado pelo curso, pois já lidavam com o mercado uma vez que eram artesãos e tinham alguns contactos.

Encurtou a relação com o artesão uma vez que passou a ter que se deslocar muito mais para as diferentes províncias a fim de organizar contactos e pesquisar novos produtos. Tudo isto derivado de serem os próprios a “fiscalizarem” todo o processo, desde o contacto, a venda directa, a análise da qualidade, pedidos muitas vezes específico a um determinado nicho, um todo conjunto de documentação legal a organizar até ao contacto final com o comprador.

A parceria com a ATA passa primeiro pela assinatura de um MOU entre ambos. Este processo de exportação começa com um pedido para o transporte de peças e desde logo então todo o processo é conduzido pelos exportadores já munidos da experiência para o efeito. Quanto à proximidade com o mercado também beneficiam das feiras organizadas pelas várias entidades incluindo a ATA, pois é lá onde observa e encontra novas criações. Só mesmo andando a pesquisar constantemente por este grande país é que se pode ter uma noção real do potencial artístico aqui existente.

A parceria funciona sim mas, poder-se-ia melhorar algo por exemplo, formação mais específica á nossa realidade, ou seja ver exemplos de casos de sucesso africanos mais concretamente sub-saharianos Ghana, Kenya Tc, que são países com uma forte componente de exportação de artesanato e adaptar á nossa realidade moçambicana.

Os cursos e formações no exterior são logicamente excelentes pois possibilitam o entender desta actividade com outra mentalidade, abertura.

Mas o facto de se conviver e aprender com quem exporta e em condições semelhantes às nossas poderia trazer imensos benefícios aos próprios exportadores, pois iria implicar uma maior exigência dos artesãos com o propósito, de com um numero maior de produtos no mercado passar a haver um numero maior de exportações o que iria não só beneficiar o artesão mas também o próprio mercado e industria do artesanato Nacional.

Devido à falta de certos apoios, de uma política de defesa quanto ao artesão, transporte e matéria prima é que surge a ANARTE. Esta associação ainda a operar somente há 4 meses é presidida pelo Sr. Mondlane um dos seus fundadores. A ideia já e muito antiga o que demorou foi a legalização, pois exigiu muitos custos e tempo, tempo esse que sempre escasseia. Esta associação surge como maneira de colaborar também com o governo no que concerne a uma política de defesa de certos direitos, pois muitas vezes há situações de confusão que originam desentendimentos a vários níveis.

Quanto ao mercado em si teve o seu ”Boom” segundo estes empresários em 2004, passando a registrar uma diminuição acentuada agora em finais de 2005. A razão apresentada para tal ainda esta a ser devidamente analisada por ambos, com o propósito de se inverter a actual situação.

Annex 3.3 Mozambique ATA Staff Interview Summary

Data: 13/Julho/2006 Início: 9:00 Fim: 14:00

Este relatório surge com base num questionário de avaliação pedido pela Organização AID to ARTISANS (ATA) à empresa de Consultoria VERDE AZUL.

Neste encontro estiveram presentes por parte da ATA:

- Sra. Chila Smith
- Sr. Evaristo Madime
- Sr. Abel Dabula

E por parte da VERDE AZUL:

- Sr. Kemal Vaz
- Sr. Bruno Barreto

Este encontro foi organizado no escritório da Verde Azul, e o avaliador é da opinião que a informação aqui discutida representa a opinião partilhada dos 3 oficiais da ATA em Moçambique mais ligados com a componente de gestão. Foi usado o guião para o STAFF, idêntico ao usado na RSA, e USA. (consultar o file “Staff G Orientation.doc”). A conversa foi simples e sem grandes pontos de contenção.

Para começar teve-se em conta principalmente 3 pontos que constam nos objectivos do PAED, nomeadamente:

- **Capacitação**
- **Prestação de serviços**
- **Sustentabilidade**

O PAED é um programa de Promoção do Artesanato nesta região de África implementado pela ATA. É um programa apoiado por um doador principal a USAID mas que para a sua implementação a organização necessita de angariar outros fundos em regime de “Matching Funds”. A existência de fundos para implementação do programa nunca foi um constrangimento em Moçambique.

Capacitação Institucional Na capacitação institucional há outras componentes, como o programa de legalização de empresas, o programa de ferramentas...ABEL: Pode falar destes programas de capacitação.

Neste ponto, foi abordada a questão da formação e os diferentes níveis de incidência. Foi-nos dito que a formação incidia a diferentes níveis,

- a) **Formal, através dos Workshops e do AMRP e MRP**
- b) **Formação em trabalho [in room workshops]**
- c) **Formação dirigida [one-on-one]**
- d) **De Forma Informativa**

Nos primeiros dois anos foi feita formação formal através de workshops em Maputo envolvendo artesão de quase todo o País. Com intuito de reduzir custos a partir do 3 ano

começaram a fazer treino a nível regional em 3 zonas (norte, centro e sul). Em regra geral faziam 2 formações por ano durante cerca de 3 dias cada e envolvendo entre 30 a 35 artesãos. Regra geral os convites para participação eram enviadas ao ARPAC para depois serem distribuídos aos beneficiários. O princípio era que cada um tinha de pagar mesmo que uma fracção do custo, mas isto limitava muito a participação pois:os participantes não conheciam se valia a pena participar, qualquer que fosse o fee cobrado, era sempre um problema pois a economia do artesão, é o da sobrevivência do dia a dia pelo menos no início). Portanto esta questão sobre a sustentabilidade nunca foi garantida desta forma. A ATA MOZ fez uma análise da cadeia de desenvolvimento do sector artesanal para avaliar as melhores formas de actuação. No entanto um aspecto importante a explorar era se do ponto de vista de formacao haveria outros elementos importantes a salientar. Além do pessoal do escritório houve uma serie de outros interveniente que participaram (ver Lista de participantes em Anexo) são de destacar o Walter Zandamela, o Tomás Melice e a Marcia Horst que se sobressaíram nestes cursos e por vezes são usados pela ATA como valiosos recursos em programas de formacao e acompanhamento. Apesar de nao vermos nenhuma menção a estes especialistas juniores durante os relatórios da ATA, achamos que este tipo de resposta são factores muito abonatórios á sustentabilidade da formacao. *Isto é muito bom, Esta rede de especialistas deveria ser mais reforçada de forma a que se possa criar uma plataforma de conhecimento local (capital humano) que no futuro possa ser usado para as varias acções de formacao.* É claro que a avaliação aos artesãos (em outro documento) irá portanto dar a outra parte da resposta.

Uma outra acção importante desenvolvida foi a realização de palestras de formacao na Escola de Artes Visuais, iniciativa esta que deve ser incentivada a fim de criar um elo entre o conhecimento teórico e as necessidades da profissionalização na vida pratica. A ATA interveio também a nível da implementação na mudança do Currículo da Escola de Artes Visuais, acrescentando mais duas valias ao mesmo, Design e Gestão de Negócios. *Gostaríamos de saber se já existe um resultado sobre a introdução nos curricula da Escola uma componente sobre o desenvolvimento de negócios?* Atenção...A ATA simplesmente iniciou contactos com vista incentivar a Escola incluir as duas componentes no seus curricular e ou, se se mostrar necessário mudar o curriculum....nada aconteceu de concreto...continua sendo ainda um plano que esta agendado para o próximo programa da ATA.

Acções na formação Formal (Workshops)

Mais específico para problemas de cada um , ou seja mais personalizado e relacionado mais com os custos e preços dos produtos. Constam aqui também

- gestão da produção
- gestão da qualidade
- revisão do produto
- Negócio em geral:
- Organização e Gestão (sistemas de qualidade; prazos de entrega)
- Custos e preços
- Marketing
- Como organizar uma feira ou exposição
- Desenvolvimento do produto (Wokshops específicos)
- Design

Foi perguntado se ao fim destes 5 anos de existência seria possível ao artesão repetir os respectivos cursos, ao que responderam que não pois o intuito seria o de atrair um numero maior de artesãos e não o de repetir com os mesmos, uma vez que deste já tinham sido beneficiados. No entanto, sempre que se mostrou necessario, houveram artesãos que repetiram os conteúdos.

- AMRP

- MRP

-“Como faziam para atrair artesãos que se encontrassem nas diferentes províncias?”

R: Neste caso lidamos com as casas de cultura (**com as Direcções Prionviciais de Cultura e as Delegações do ARPAC, e nao casas de cultura**) existentes através de convites específicos

Informativo

Mais a nível do boletim “As mãos falam”. Mais pormenores sobre isto pudemos ver da análise ao Artesão. No entanto a distribuição deste boletim nunca foi acompanhado de perto de forma a avaliar se o mesmo tinha o impacto pretendido, se era mesmo distribuído em condições e a periodicidade não era regular.

Formação em trabalho

Haviam dois tipos de intervenção nesta área: formacao através das visitas de monitoria e mais relacionadas com o negocio e sua estrutura e a outra através de contratados especialistas que regra geral trabalhavam no desenvolvimento de produto, novas linhas, controlo de qualidade. Achamos que também o PAED deveria ter promovido as visitas entre artesãos. Isto acontecia mais em encontros formais (como feiras) e não nos locais de trabalho Não é bem assim. Acho que o Abel tem que falar do PRODUCE mas também da outra iniciativa para Zanzibar.

A ATA promoveu o intercâmbio entre artesãos Moçambicanos e artesãos de El Salvador, Honduras, Africa do Sul e Tanzania. Estes intercambios tiveram como objectivo principal promover a troca de aprendizagens sobre materias ligadas a produção, gestão e legalização de empresas/ associações de artesanato.

Formação de Exportadores

No que respeita á formacao aos exportadores, houve sempre uma fraqueza muito grande neste sector, e mesmo a ATA não conseguiu mobilizar-se para apoiar de uma forma diferente de forma a conseguir uma maior massa critica no sector. Nos 3 primeiros anos esta situação estava muito mal havendo somente 1 exportador (o segundo desistiu). Uma das justificações para este fraco interesse esta ligado com uma produção baixa, não se justifica muitos exportadores quando a produção não é suficiente para garantir o sustento de um exportador...assim era o caso no início do PAED. Então a formacao teve as suas limitações neste campo. Alguns exportadores da Praça também não quiseram trabalhar com a ATA eventualmente porque não entenderam bem o proposito da ATA e as

vantagens que a organização poderia trazer...mas por outro lado, foi uma atitude natural de defesa das oportunidades de negocio que ja havia conquistado {importa lembrar que alguns exportadores ja exportavam para varios paises e o artesanato continuava sendo uma área virgem, dai a auto-proteção]

No inicio do PAED o volume de vendas do baseline era pequeno [esta analise deve ser cuidadosa...pequeno em função de que? Ou comparado a que? Este valor corresponde ao baseline não ao ano 1 do PAED...posto desta maneira pode induzir ao pensamento de que este tera sido o desempenho inicial do PAED....o volume de vendas no ano 1 do PAED foram na ordem de U\$ 60 000...portanto o dobro do baseline....acho que aqui a abordagem deve centra-se no aspecto positivo deste feito,pelomenos foi o que quizemos dizer....uma outra perspectiva de analise e a que diz respeito a realização [volume de negocio] vis a vis as projecções....repare que para oano 1 a projecção era de U\$75.000 e desse valor foram realizados 80%....a nossa perspectiva de analise centra-se neste binômio projecção-realização....Bom, em ultima instancia queria memso dizer que seria mais prudente não dizer que o volume era muito baixo ou pequeno, mas talvez apenas dizer qual o valume...(USD30.000?) hoje foi reportado que as vendas andam á volta dos USD300.000, dos quais cerca de 50 a 60% corresponde á exportação.

O PAED teve sempre um constrangimento - o seu ritmo era definido pelo ritmo dos parceiros e beneficiários. Isto de um certo modo atrasou o andamento e implementação do programa.

Prestação de Serviços

1. Houve muito trabalho nesta área através do PAED. No entanto a ATA sempre ocupou um lugar no mercado, que em Moçambique continua muito pouco desenvolvido – as redes de comercialização mais diversificadas do ponto de vista tanto regional como dos próprios produtos que na sua maioria se reduzem aos produtos de madeira O mercado decide per si o posicionamento dos produtos em função de criterios como qualidade, tendências, preço e capacidade de fornecimento. Ora, como a estartegia do PAED assenta na promoção de comércio internacional de artesanato, de uma forma natural apenas os produtos derivados de madeira se posicionaram de forma competitiva....não houve nenhuma intenção deliberada da ATA.... E preciso olhar para alta competitividade que caracteriza o mercado internacional e ver como e com o que Moçambique poderia aproveitar a oportunidade de mercado.] e muito recentemente a palha. Talvez neste campo não esta bem clara para o avaliador que estratégia o PAED tinha. Ou se não se deu conta de que o estrangulamento iria ficar nesta parte da cadeia. Se visitar o PAED Strategic Plan ira ver que a estartegia estava assente na promoção de exportações de artesanato de variados materiais alem da promoção de acções com vista a promoção de acções que incentivassem os players do sector de artesanato a usarem os recurso naturais de uma forma sustentavel.
2. A intervenção da ATA na cadeia sempre foi algo que teve em mente que não deveria ser de longo termo [alias, so ocorreu porque não havia players disponíveis a exercer este papel na cadeia], dai que se tenha desenhado o prgrama

EXPORT que visava essencialmente promover e incentivar exportadores a operarem nesta area.

3. Como podem observar a ATA desde inicio que se deu conta e priorizou essa area, no entanto e preciso entendermos que o sector de artesanato e por excelencia uma area de negocio por tal, toda açcao de promoçao e incentivo em ultima instância acaba dependendo da percepçao que os agentes económicos tenham sobre as formas e fontes de financiamento e os riscos do negocio.

Do ponto de vista sustentável houve uma necessidade premente do PAED dedicar maior atençao a preservaçao do Recurso Natural, e por outro lado diversificar a origem dos produtos (arame, panos, palha, pele, fibra sisal e outras, cerâmica, plásticos, miçangas, etc.) mas simplesmente não resultou em um movimento de negócios para os grupos com quem trabalhamos.

WEBSITE

- “Estando no SITE como fazer para ver os produtos?”

R: “O acesso é restrito para se evitarem actividades que prejudiquem o negocio da ATA. Só mesmo estando interessado e indo as respectivas entidades. Isto porque cada vez mais um produto exposto e facilmente copiado e logo pirateado. Este método “obriga” também a serem desenvolvidas relações comerciais, preservando o produto. O desenvolvimento de conhecimentos sobre o update e gestão deste site fica de inteira responsabilidade da ATA nos EUA. Aachamos que era necessário começar a criar condições para poder haver um site gerido inteiramente no País.(Seria ideal mas, e preciso reparar que ainda não ha condições para operacionalizar o ecommerce...se estamos a verificar q o sector ainda esta precisando de uma grande açcao de organizaçao, formalizaçao e responsabilizaçao não seria neste momento algo visível acredito. E sim, um objectivo a alcançar em médio prazo)

EXPORTADORES

Em 98 quando iniciaram este Projecto não existiam, não era formal. Hoje em dia há pelo menos 3, 2 deles com formação e um ainda sem formacao..

- “Poderia ter sido mais ambicioso em termos de numero de exportadores”

R: “Sim poderia , mas há que ver que não havia exportadores, logo seria necessário aumentar a produçao para posteriormente se poderem criar mecanismos para exportar os produtos. Daí a aposta principal incidiu nos artesãos. Este movimento fez com que outros surgissem, beneficiando deste modo o mercado.

Sustentabilidade

PROPOSTAS DE FINANCIAMENTO

São elas todas elaboradas em Moçambique, tendo em conta os factores consultivos (goals; objectives). Também neste contexto existe um espaço para se criar uma CRAFT VILLAGE, há Capacidade mas não há espaço, este aspecto foi discutido com a Cidade mas sempre houve problemas na priorizaçao, seria interessante que este movimento fosse liderado por artesãos locais (de Maputo) assim como o mesmo seria feito em alguns focos no País.

O que seria o maior erro de pressuposto no PAED?

R: “ O principal aspecto negativo no PAED, identificado foi o de se ter tentado transformar artesãos em empresários. Hoje depois de alguns anos de experiência verificamos que isto foi um erro, gestor não tem de necessariamente ser artesão (estamos a ver que este poderá ter um papel de empregado, assalariado, avençado, etc.), isto devido a motivos de ordem diversa, sendo um deles o facto de até então o sector artesanal em Moçambique ser muito incipiente e portanto não haver ainda a ideia de que este é um negocio que pode ser uma forma de resposta ao combate á pobreza no meio rural como urbano. E o outro problema relaciona-se com o baixo nível de escolaridade”. No futuro, iríamos apostar no empresário que emprega artesãos e não tentar que o artesão vire empresário forçosamente.

O sector dos artesãos não tem ainda uma bagagem de base para facilmente adquirir os skills necessários a um empresário. Estamos perante a necessidade de uma transição e mudança de comportamento pessoal, coisa difícil de interiorizar num projecto e de difícil avaliação. O PAED também não poderia atender a diferenças de cultura, que hoje observamos existirem: p.e. em Sofala os artesãos trabalham para maximizar vendas (apesar de muitas vezes o fazerem em perda), trabalham mais horas e por vezes os 7 dias da semana, chegam a fazer 30-40 Milhões de Meticais mensais; em Nampula o espirito é diferente, o negocio não é tão importante, e chegam mesmo a questionar os compromissos de negocio com outros de caracter social/cultural; já em Maputo, os artesãos estão habituados a uma ligação mais forte a múltiplas oportunidades de negocio. Estas diferenças afectam sobremaneira o andamento do PAED do ponto de vista regional/provincial.

Hoje o sector pode-se caracterizar num balanço de quase 100 % representado por micro-empresas, a maior parte delas informais. O ideal seria ter-se por ai uns 20% de SME's, jja que estas teriam sempre um papel mais alargado, nomeadamente, o apoio ás pequenas empresas em desenvolvimento de produtos, em consolidação de encomendas para a exportação, em participação em firas internacionais, etc. A haver um programa adicional este deveria reverter esta situação, direccionando o seu apoio também para a promoção da criação das SMEs.

- “ Quanto aos beneficiários, os vossos objectivos foram atingidos?”

R: “De modo geral sim, mas há duas análises que têm de ser feitas. Primeiro quanto a beneficiários directos (facilmente mensuráveis), e quanto aos beneficiários indirectos. Este é mais complicado pois tem de se ter em conta os indicadores estipulados:

- número de formados
- oportunidade de negócios (feiras)
- volume de vendas. Este é medido através da produtividade, e para tal há que ter os dados correctos do número de vendas, facto esse nem sempre se consegue registar correctamente.

“Quanto ao sucesso do PAED?”

R: a apontar em poucas palavras para o sucesso do PAED teremos:

- a) maior visibilidade dos artesão moçambicanos e da sua artes nos mercados de prestígio e internacionais;

- b) maior nível de organização do sector artesanal
- c) Despertar internamente mais capacidades, mais criatividade, mais obras diferentes
- d) Melhoria de condição de vida para o artesão
- e) Maior eficiência neste sector.

-“ O que se gastou com o PAED se tivesse sido entregue directamente aos artesãos, os objectivos teriam sido os mesmos?”

R: “ Quem sabe?, mas temos de salientar que o PAED também serviu de alavanca para fomentar o respectivo mercado e como sempre em projectos de desenvolvimento nem todos os proveitos são tangíveis, o “Return On Investment” É sempre difícil de calcular. É claro que se pusermos simplesmente a razão de Volume de vendas sobre as Despesas do PAED, este dá índices muito baixos. Também pudemos calcular se custo médio por artesão justifica a sua receita media, aqui seria no entanto adiantar o que foram o grupo alvo atingido, mas este numero por sua vez é difícil de medir. Mesmo dos beneficiários directos nem todos continuaram durante a vigência do PAED e outros entraram em diferentes fases da implementação.

Também gostaríamos de fazer uma análise do valor da mão de obra artesã. Quanto pagamos por cada hora de trabalho? Será que existe uma mais valia entre o produzir mais peças com menos mão de obra (através da mecanização) ou continuar os processos completamente manuais.

-“ Dispunham de flexibilidade para arranjar alternativas de implementação do PAED?”

R: “ Sim, tínhamos apoio nas nossas decisões.”

Em relação aos insucesso do PAED foram apontadas:

- O reforço da rede de exportadores ficou abaixo do desejável;
- Nunca conseguiu responder á demanda do mercado, no mercado externo havia mais procura do que de facto se conseguia produzir

PARCERIAS

Começou-se por falar da ANARTE que seria uma ONG dirigida pelos próprios artesãos. Mas como já foi visto anteriormente (relatório do ano 3) apontaram-se varias razoes para o fracasso desta iniciativa. O que é deveras engraçado é que hoje um grupo de artesãos está puxando por esta criando a ANARTE. No entanto não se sabe se terá ou não sucesso, já que no país tem sido craidas muitas organizações mas muitas delas morrem logo depois por falta de empenho dos seus membros.

Nesta fase final do projecto para Moçambique, não se pretende deixar o mercado sem “líder” no que concerne um todo conjunto de apoio aos artesãos. Daí ter surgido a ideia de uma ONG local com objectivos já mais adaptados a nossa realidade, em que numa primeira fase passaria a ser dirigida pelos quadros da ATA em Moçambique.

Para além disso existe ainda uma ideia de criar um “CRAFT COUNCIL”, este terá como funções regulamentar e institucionalizar o mercado específico do artesanato.

GESTÃO DO PROJECTO

O projecto inicia com um escritório em Maputo, mas mais tarde foram abertos 2 mais escritórios. Em Nampula no ano de 2004 e na Beira no ano 2004 em Manica e em Inhambane foram feitas parcerias com empresas privadas ou instituições afins. Este foi um dos benefícios vindos da avaliação de meio-termo. Pois acharam que o pessoal era muito pouco e este facto pode ter afectado o ritmo de implementação do PAED. Também devido a isto os tempos de ocupação não foram bem planificados e assim não ficava muito tempo para formação, férias ou outras actividades de planificação estratégica.

Aqui foram perguntados vários sub-temas relacionados com a gestão do projecto, nomeadamente:

Relacionamento entre o pessoal da ATA – Sem problemas entre ambas as partes, incluindo as diferentes zonas de acção da ATA. O relacionamento entre o pessoal da ATA a nível do Escritório e a nível regional é boa.

Desenvolvimento de Parcerias – Diminuir a distância física, empowerment. O escritório aponta que se tentaram alimentar, algumas relações entre o ATA e alguns parceiros locais. De salientar por exemplo o relacionamento com o Cantinho dos Artesãos, O Comercio Justo, a Escola de Artes Visuais, o IPEX, a UNESCO.

Formação do pessoal da ATA e Marketing – Há um “gap” no factor reciclagem dos formadores. Pelo menos na componente de M&A, não houveram muitas oportunidades de formação, e mesmo de melhorias do SM&A, como a definição de uma ferramenta adaptada para recolher informação, fazer a sua análise e com base nos resultados reagir. Um aspecto apresentado foi também a falta de tempo para participar nas actividades de formação que a ATA proporcionava.

Design – Só com base em outsourcing, pois não se justifica haverem contratados a tempo inteiro. Praticamente os relatórios só referem a consultores externos, mas soubemos depois que também se fazia recursos a pessoal do escritório e pessoal local que tinha feito com sucesso os cursos de formação. Sendo que existem 3 formadores já formados pela ATA. Pensamos que devido ao nível académico e dificuldade de língua os consultores externos deveriam ter trabalhado mais junto com os jovens profissionais.

Gestão Financeira – Através de balancetes que são enviados para a sede, a fim de ser processado juntamente com a contabilidade geral da ATA.

Localização do Escritório Principal – Excelente pois é onde existe a afluência dos meios necessários (de acesso, contactos e infra-estruturas de apoio) à própria função do escritório. Foi indicado que muitas vezes os artistas usam este escritório para receber formação e colocar questões técnicas.

MONITORIA E AVALIAÇÃO

Neste ponto abordou-se o facto de existir um banco de madeira, criado para facilitar o acesso a uma madeira de qualidade. Este foi de facto um aspecto positivo do SM&A. Pois apesar de não ter sido como um constrangimento no início do projecto, com a implementação do PAED chegou-se á conclusão que a qualidade do produto final assim como o cumprimento dos prazos de entrega era muitas vezes comprometido. . Foi-nos dito que existem dois bancos de madeira – um em Maputo e outro em Nampula. Eles funcionam sobre a responsabilidade da unidade de M&A (o de Maputo) e sobre a responsabilidade do Coordenador Provincial (Nampula). Cada banco é directamente gerido por coordenadores de produção, que estão encarregues de controlar, a entrada e saída das madeiras através de uma marcação prévia. Estes bancos deveriam ser o garante de que a madeira usada é proveniente de florestas que tem um plano de gestão aprovado. Esta estratégia dos bancos de madeira deveria ser mais aprofundado também para outros recursos e achamos que mais trabalho deveria ser desenvolvido no que respeita ao uso sustentável dos recursos, pois não é suficiente haver um plano de manejo florestal para garantir que a floresta é gerida sustentavelmente. Foi-nos explicado que no que diz respeito à reflorestação, têm desenvolvido um trabalho conjunto com o CEF. Contactos com o CEF deram a intender que existia sempre uma vontade da ATA de tentar apoiar na investigação e certificação de madeira para os artesãos. Foram ainda produzidos cerca de 3 relatórios sobre o uso de recursos florestais no artesanato. Presentemente existe um ensaio sobre a propagação do sanado adaptadas as condições de exploração da floresta de Djabula.

Esta ideia de criar um banco de madeira surgiu como um projecto complementar implementado dentro do conceito de desenvolvimento de um centro de recursos. O que se revelou verdadeiramente positivo, pois estreitou as relações com os doadores a um nível serio de compromisso mútuo *Achamos que um modelo adaptado e muito semelhante ao usado em Durban pela The Bat Shop deveria ser estudado no intuito de tornar o centro numa oportunidade de negócios. É necessário que muito rapidamente a ATA ponha alguma atenção sobre o que fazer sobre esta infra-estrutura, e a nosso ver deveria ser experimentado um modelo durante uns dois três anos para a criação de uma SME. l..*

Durante a vigência do PAED a ATA implementou os programas complementares, ajudando bastante a consolidar o próprio PAED e as relações com os doadores, neste aspecto a necessidade dos matching funds pode ser vista como uma oportunidade.

A experiência em Moçambique mostra que o artesanato é uma forma muito eficaz de aumentar a renda familiar e sobretudo de adicionar valor aos nossos recursos naturais.

Na Escala de 1-10, 10 sendo completamente satisfeito e 1 sendo completamente insatisfeito, qual o seu grau de satisfação com o PAED nas seguintes áreas?

Rating	
7	Project design appropriateness
6	Project output/indicators appropriateness
9	Project implementation satisfactoriness
9	Quality and timeliness of communication and reporting

7	Fiscal management satisfactoriness
8	Project management satisfactoriness
6	Project cost effectiveness
7	Overall satisfaction (or average of the above) (*This last number is essential to the interview and must not be left blank.)

Annex 3.4 – Field Work Report Summary – Enumerator’s Report, Mozambique

Este relatório surge com base num questionário de avaliação pedido pela Organização AID to ARTISANS (ATA) à empresa de Consultoria VERDE AZUL.

ARTESAOS EM MAPUTO

Com base nas entrevistas feitas aos artesãos que beneficiam do apoio da ATA (directo e indirecto) podemos concluir que:

MATÉRIAS PRIMAS

- A nível das matérias primas utilizadas, na sua grande maioria são utilizadas principalmente em Maputo a madeira, pois é considerada uma das principais vantagens existentes tanto a nível de produção como de mercados a atingir. Pois as outras fontes de matéria prima já têm um mercado mais agressivo e com mais notoriedade do que em Moçambique.

Devido à constante preocupação com o meio ambiente e não só (também devido a dificuldade de conciliar o acesso ao crescente pedido de produtos) foram criados os “bancos de madeira”, que proporcionam um fácil acesso do artesão à matéria prima contribuindo para o respeito de prazos estipulados principalmente pelos clientes Internacionais.

Assim sendo, o acesso passaria a ser feito através de coordenadores de produção, que estão encarregues de controlar, a entrada e saída das madeiras através de uma marcação prévia.

Esta ideia de criar um banco de madeira surgiu como um projecto complementar implementado dentro deste outro principal. O que se revelou verdadeiramente positivo, pois estreitou as relações com os doadores a um nível serio de compromisso mútuo.

EDUCAÇÃO/ FORMAÇÃO

- Neste ponto, importante realçar que os beneficiários mais antigos, ou seja os que há mais tempo trabalham com a ATA, têm não só equipamento em muito boas condições mas também oficinas em óptimo estado, o que lhes permite a execução das tarefas sem transtornos de maior.

Na sua grande maioria beneficiaram de formação específica para os objectivos propostos, sendo estes muito apreciados e imprescindíveis.

A formação foi efectuada a diferentes níveis e com diferentes intervenientes, sendo esta muitas vezes realizada a nível Internacional.

Um aspecto comum foi o de todos os entrevistados terem salientado o pormenor de ter sido através de certas acções de formação que despertaram uma maior atenção, um maior carinho por esta actividade.

APOIOS DA ATA

- Quanto aos apoios estes foram inúmeros e todos eles de enorme relevância para os artesãos, pois permitiram o acesso até então inexistentes (mercado principalmente).

Neste ponto muito importante salientar o bom número de maquinaria e ferramentas proporcionadas. Tudo isto fez com os artesãos melhorassem a sua capacidade de produção e consequentemente o seu nível de vida.

SATISFAÇÃO

Satisfação geral no que concerne à totalidade dos inquiridos, pois devido a este projecto beneficiaram de alternativas e metodologias específicas, onde puderam pôr em curso o que aprenderam durante a formação e não só. O facto de terem sido contemplados com cursos sobre gestão de negócios por exemplo, permitiu-lhes aperceberem-se do processo todo em si desde o artesão, o desenvolvimento do produto, mercado às exportações.

COMENTÁRIOS

Os cursos e formações no exterior são excelentes pois possibilitam o entender desta actividade com outra mentalidade, abertura.

Mas o facto de se conviver e aprender com quem faz e em condições semelhantes traz imensos benefícios aos próprios, pois implica uma maior exigência dos artesãos, com o propósito de com um numero maior de produtos no mercado passar a haver um numero maior de exportações o que iria não só beneficiar o artesão mas também o próprio mercado e industria do artesanato Nacional.

Quanto às parcerias existente estas funcionam no sentido em que se criam condições de facilitação para o artesão, facilita-se a sua interacção no meio incentivando deste modo não só o aumento das obras, o seu aperfeiçoamento, melhoria de técnicas mas o que consideramos um aspecto de realçar é o facto de passar a ter o reconhecimento como um meio capaz de gerar rendimentos a fim de proporcionar uma melhoria nas condições de vida.

De salientar a falta de regulamentação específica deste sector, como se pode verificar com o facto de um artesão ao pedir a sua licença no Ministério da Cultura para poder vender o que produz, ser-lhe passada uma licença de promotor de artesanato. Isto faz com que se crie um mecanismo de fuga aos impostos, uma vez que para exportar é necessário uma licença do Ministério do Comércio (com as respectivas taxas e impostos), ao invés da passada pelo Ministério da Cultura, que passa a de promotor e com as mesmas facilidades (mas sem impostos) em vez da de simples artesão, passando este a ser criador vendedor e exportador se bem o entender.

O maior sucesso do projeto foi o de conseguir sensibilizar o artesão da importância deste negócio, do transmitir e disponibilizar mais conhecimentos sobre o negócio, além de relançar o nome de Moçambique no mapa do artesanato Mundial.

Relatório de Campo – NAMPULA.

De forma geral o trabalho correu bem.

- Primeiramente falei com o Sr Magibire ao telefone e marquei um encontro com ele. O Sr Magibire ao falar comigo ao telefone mostrou um certo descontentamento devido ao atraso do inicio do trabalho (visto, conforme ele, os

artesão já terem sido avisados a algum tempo e possivelmente já estarem cansados de esperarem a nossa visita).

-
- Mostrei a nossa lista ao Sr Magibire e o Sr Cassimo, que foi quem me acompanhou durante o trabalho, e eles disseram que não conheciam nenhum daqueles beneficiários, apenas dois deles que por sinal vivem na Ilha de Moçambique.
-
- O trabalho começou na segunda Feira a tarde. O Sr Cassimo acompanhou - me durante a visita e foi muito atencioso, indo comigo para todo lado e esperando ou procurando outros artesãos que não estavam presentes nos locais (enquanto eu entrevistava algum artesão).
-
- Segundo os Funcionários da ATA eles apenas tem 15 beneficiários directos, dos quais só conseguimos contactar os que estão presentes na lista enviada para o Maputo. Os outros estavam ausentes ou já não faziam parte dos beneficiários directos da ATA.
-
- o trabalho com o SR Cassimo durou três dias cheios, dos quais sexta e sábado trabalhei sozinha com artesãos não beneficiários da ATA.
-
- os inquiridos aceitaram bem as entrevistas, mas mostraram - se preocupados e curiosos quanto ao termino do projecto da ATA aqui em Nampula.
-
- Do meu ponto de vista, a ATA esta a fazer um bom trabalho, mas em alguns aspectos não deixa os artesãos andarem pelas suas próprias pernas (no que concerne ao fornecimento do contacto dos clientes) sem dependerem da ATA, o que se mostrou ser um grande problema para o desenvolvimento dos artesãos.
- A maioria dos artesãos mostraram os seus registos e boletins, só não o fizeram aqueles que estavam longe de casa ou não tinham conhecimento da ATA.

Genoveva Rente

Relatório de Cabo Delgado

Conforme seu pedido, junto remeto a informação sobre dificuldades encaradas no trabalho realizado na Cidade de Pemba (Inquérito) e auxílio recebido.

Durante a realização das entrevistas aos artesãos as principais dificuldades sentidas foram as seguintes:

- Relutância dos inquiridos em responder;
- Dificuldades de comunicação com os entrevistados;
- Fraco entendimento das questões inseridas no inquérito; e
- Mobilidade dos artesãos.

Em relação ao primeiro aspecto, **Relutância dos inquiridos em responder**, mesmo após uma pequena introdução sobre os objectivos do inquérito, os entrevistados não mostravam-se muito cooperativos. Diziam estar cansados de responder a este tipo de perguntas sem que depois tivessem algum *feed - back* daqueles que os inquerem. Em muitos casos foi necessário prometer que depois do inquérito poderia responder as questões que os entrevistados tinham.

Relativamente a questão de **comunicação**, alguns dos inquiridos não falavam o Português, apenas a língua Maconde. Nestes casos foi necessário recorrer a tradutores, com os inconvenientes daí decorrentes, nomeadamente, deturpação do teor das perguntas e das respostas;

Por outro lado, as **questões inseridas** no inquérito eram de difícil compreensão para os entrevistados. Em muitos casos foi necessário perder muito tempo para explicar apenas o que se pretendia saber com uma dada questão.

A lista dos artesãos que foi remetida para a inquiridora localiza-los não foi bastante útil, dada a **mobilidade** destes. De acordo com informações colhidas no terreno, alguns artesãos voltaram para as suas zonas de origem, sobretudo o planalto de Mueda, outros já não exercem a actividade, devido a idade e outros factores sócio - económicos, outros ainda perderam a vida.

No que concerne ao auxílio recebido, importa salientar o prestado pela Dona Lesley, a qual ajudou na indicação dos locais onde decorreram as entrevistas, bem como no transporte para os referidos pontos.

14 de Julho de 2006
Fátima Giramó