

Technoserve

MOZAMBIQUE CASE STUDY



 **infoDev**
Agribusiness



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TECHNOSERVE, MOZAMBIQUE CASE STUDY

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1. SUMMARY

The innovative approaches and methods that Technoserve Mozambique (TnsMz) has pioneered have become “best practice” templates for other Technoserve country operations and, indeed, best practice templates within Mozambique itself, where TnsMz’s successes in the cashew, banana and poultry industries are notably successful.

Technoserve is not a traditional incubator. It offers no centralized facilities for practicing and refining business skills, but rather serves its clients where they do business, in the rural areas where crops and animals grow. However, it frequently creates partnerships with industry leaders using their sites to demonstrate and/or train new market entrants in bestpractices for processing, marketing, logistic management and quality control. Its programs are designed to stimulate investment, job creation and local economic activity within commoedity-oriented agribusiness sectors, which typically afford only thin profit margins. TnsMz provides incentives in the form of grants or matching grants to change behavior and to introduce new technologies within farm-to-market chains.

2. BACKGROUND AND CONTEXT

Technoserve Mozambique (TnsMz) is based in Maputo, the country’s capital. It serves the entire national agricultural economy from its headquarters office. Mozambique is a large country, with multiple climate zones, abundant water supplies, rich soils and relatively low population density. It is strategically located next to South Africa, the largest market for food products on the African continent. In spite of these advantages, its agribusiness development has been extremely slow.

Technoserve Mozambique is a financially autonomous division of the Technoserve Group (TnsGp), a nonprofit corporation specializing in agribusiness development worldwide. TnsGp has offices in several developing countries, including ten in other Africa countries and seven in Latin America. TnsGp participates in the Food for Progress Program sponsored by the US government. Proceeds from the Food for Progress Program have been TnsMz’s primary source of funding.

The innovative approaches and methods that TnsMz has pioneered have become “best practice” templates for other Technoserve country operations and, indeed, best practice templates within Mozambique itself, where TnsMz’s successes in the cashew, banana and poultry value chains are notably successful.

TnsMz operates at the level of the entire agricultural sector. Its programs are designed to stimulate investment, job creation and local economic activity within commodity-oriented agribusiness sectors, which typically afford only thin profit margins. TnsMz provides incentives in the form of grants or matching grants to change behavior and to introduce new technologies within farm-to-market chains. TnsMz charges for its advisory services, in order to ensure that only serious and committed parties avail themselves of its support. However, service fees account for very little of the nonprofit’s total costs.

TnsMz’s core activities are almost fully supported by donor grants. As noted, it uses the USDA’s monetization program for surplus food. However, USDA is not the only supporter: five donors have

supported TnsMz's activities under 11 funded projects, most of which entailed multi-year funding commitments.

TnsMz was started with a four-year grant from USAID that was designed to support value-chain development in three industries: cashews, horticulture and oil seeds. TnsMz extended its activities vertically into other agribusiness industries, where it continued to test and refine its sector-development methods. At the same time, TnsMz expanded horizontally into policy analysis and advocacy, promoting regulatory compliance reform and private sector investment, and developing new instruments for bottom-of-the-pyramid investment (e.g., franchises). Although TnsMz does not develop institutional capacity per se (such as industry-specific trade associations), it does carry out such work as part of larger sector-development programs, typically in partnership with another specialized NGOs.

Much of TnsMz's success has come from its strong focus on value-chain strengthening and on development of mid-chain integrators. Technoserve chooses its industries carefully, based on a *a priori* analysis of the growth and rural employment enhancement potential they offer. It avoids working with more than five or six industries at a given time. Within specific industries, it works with first movers and industry leaders to re-engineer their business models and competitively upgrade their business processes. It then engages these industry leaders to show the way to others in the industry through training, workshops and other forms of knowledge-sharing. In several instances TnsMz has helped develop new industry associations, through which it disseminates competitiveness-enhancing technology, business-process and business-model templates.

A significant part of Technoserve's success comes from the artful integration of two internal competencies: i) deep, hands-on knowledge of specialized agricultural production processes and well-tested agricultural market knowhow, and ii) strong analytic skills. Technoserve recruits seasoned experts in each industry, and complements these specialists with functional specialists in agronomy, plant science, quality control, temperature-controlled transport, and forestry, among others. In addition, the nonprofit recruits young, temporary staff for short-term assignments from leading advertising firms, investment banks and consulting firms (McKinsey and Co. is its primary consulting source).

In addition to its core incubation activities, TnsMz recently started two for-profit businesses, both of which it has constituted as wholly-owned subsidiaries. One is an agribusiness franchisor whose mission is to help nano-level agribusinesses adopt well-tested business models and develop them as part of a mutually supportive business network. It envisions that milling and other franchises will not only stimulate market activities in local farm communities but will also activate collateral business activities. The franchise concept it is preparing to test and refine is a holistic one, which entails development in several different markets.

TnsMz's second for-profit undertaking is a professional services company that will provide advisory services to macro enterprises. Its clients will include domestic and foreign investors who are interested in purchasing land for agricultural use in Mozambique. The company will leverage its substantial expertise in multiple farm industries to help investors comply fully with all of the socio-economic qualification requirements that attach to rural land ownership in Mozambique, including local community approval.

TnsMz's investment advisory company will organize and manage the community consultation and community negotiating process so that the full intent of the Mozambique's legislation is achieved,

and so that rural community interests are protected without slowing the process of potential investment projects or creating excessive risks for potential investors. Technoserve will act as an honest broker between local communities and investors.

3. STRATEGIC VISION, MISSION, AND TARGETS

Vision: Inclusive, sustainable economic growth in rural Mozambique. "Inclusive" means sharing economic gains among participants throughout the farm-to-market chain. "Sustainable" refers to environmental, economic and, indeed, spiritual sustainability.

Mission: Facilitate private agricultural sector initiatives that are well-planned, well-implemented and targeted to leverage private investment in specific sectors with high job-growth potential.

There is no cash economy in many rural parts of Mozambique. TnsMz has succeeded in developing new markets for rural labor, new markets for farm products, and new markets for local inputs. They all result from the success of its client chain integrators, who invest in value-added processing and marketing of farm products. These chain integrators create wealth and jump-start inclusive growth.

TnsMz has attempted to increase the multiplier effects of private investment in specific agribusiness industries by building institutions to facilitate socially beneficial leveraging of locally created products. The incubator's intent is to maximize the collateral impact that private investment in new enterprises creates with respect to local payrolls and local sales of farm inputs to these new enterprises, as well as the secondary creation of new services and new enterprise spinoffs.

A significant portion of total benefits that TnsMz attempts to realize within local economies results from retraining farmers. Properly trained farmers can be integrated into more sophisticated value chains. Training also results in productivity gains and in changes in product quality, cultivation methods, seed selection, modes of land preparation, pest control and irrigation. Whenever possible, TnsMz trains farmers under the auspices of private companies that purchase specific crops or trade in specific regions.

TnsMz develops what it refers to as a "pipeline of companies" in each industry for which it plans a competitiveness upgrade. Companies selected for pipeline participation are industry leaders. The size of these companies differs by industry and with stage of development. Pipeline companies in the cashew sector, for example, employ fewer than 100 workers and operate single factory or value-adding facilities.

TnsMz's ultimate mission is to create wealth for rural populations by creating new labor markets and new productive activities, both on and off farms. The rural poor who make less than \$1 per day are its ultimate constituents.

4. TECHNOSERVE MOZAMBIQUE'S DISTINCTIVE FEATURES

1. Leadership that can select expertly skilled individuals, or in Technoserve's language, "put the right people on the bus."
2. Business systems with sound financial controls that enable tasks to be integrated of tasks over expansive territory, in ways that ensure that related work is synchronized and that businesses can respond rapidly to market developments, competition, and new technology.
3. The identification and characterization of industry participants, strengths and weaknesses; benchmarking of the value chain against next-best competitors; assessment of global market dynamics; and outline of the steps required to move an industry forward from its baseline conditions to a future stage of development.
4. Testing the product quality, market acceptance and production processes of industry leaders to determine viability given investment and process reform.
5. Advocate policy reforms that will make it possible to overcome regulatory, trade process and other constraints. A case in point involved efforts in partnership with the Poultry Growers Association of Mozambique to force the national government to enforce food safety standards and thus prohibit the importation of frozen Brazilian broilers with expired sell-by dates.
6. Facilitate the restructuring of individual sectors by encouraging the merger and acquisition of weaker companies by stronger ones, particularly during periods of market weakness.
7. Testing of various business models in each industry through multiyear economic experiments in order to discern the most appropriate technologies, relevant economies of scale and of specialization. Once business-model refinement is complete, paradigms typically emerge of best models for broad application. Those paradigms are disseminated throughout the rural space.

5. BRAND AND MARKET POSITION

TnsMz's approach to branding and market positioning is word-of-mouth, similar to accounting, law and financial advisory firms. Its market position is based on the results it has been able to realize and on the fact that the agro-industrial sectors it has supported have grown, increasing their share of GDP and the number of jobs created.

Competition for economic development funding among US-based NGOs and consulting firms is intense. Technoserve has distinguished itself from these competitors by: i) its reputation for delivering results, ii) its engagement of expert specialists in each industry in which it participates, iii) the rapport and trust it has engendered with policy makers and government officials, and iv) its deep institutional ties to specific emerging sectors, including cashews, bananas, poultry, lentils, bananas, and soy beans.

TnsMz has distinguished itself in Mozambique as a dependable provider of solutions to real growth challenges. Its proffered solutions are pragmatic, affordable and sustainable. A case in point was TnsMz's bid on a USAID flood relief program. It analyzed how indigenous foresters might become more sophisticated and proposed to engage local communities of woodcutters to clear affected areas, applying low-cost loans as the instrument. Rural families understand how to cut down old trees and plant new ones. With TnsMz's approach, it was possible to help woodcutters develop forestry skills that could serve as the basis for a Mozambique forestry industry.

TnsMz is distinctive not only in its search for sustainable solutions but more generally for its pragmatic problem-solving approach. It is pro-business, even pro-large business, as long as businesses comply with a country's regulations and laws.

6. APPROACH TO INCUBATION

TnsMz offers not standard remedies but contextual solutions to deficiencies in competitiveness. Solutions are designed to fit specific stages of industry development, technology starting points, actual competitive challenges and emerging opportunities. TnsMz searches for examples of best global practice in farm-to-market chains and endeavors to develop these in a Mozambican context. Over its term of its engagement with a specific industry, Technoserve analyzes market and production cost conditions, tests proposed solutions in demonstration projects and continuously improves process and infrastructure in each link of farm-to-market chains.

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7. BUSINESS MODEL

TnsMz describes its approach to agribusiness development in Mozambique as "Mission Driven, Donor Friendly." What this means is that the nonprofit has chosen the difficult task of steering between its own priorities for action and investment within specific agribusiness industries and the priorities embraced by donors, as reflected in the terms of reference and defined in the work programs donors support.

Approximately 90 percent of TnsMz's revenue comes directly from its donors. The nonprofit's dependence on its parent corporation has been minimal in recent years, as has its need to solicit emergency funding from donors to support its operations.

TnsMz's business model requires that management sell its vision of a diversified, private sector-driven agribusiness future in Mozambique through full engagement in the sector. It sells its vision to large private-sector investors by emphasizing their investments and value-chain structures, to small farmers

whom it seeks to reorganize and include in new value-chain structures, and also to government policy makers, whom it tries to influence to remove obstacles to investment and growth. Most importantly, TnsMz must sell its vision to donors.

Donor	Sector	Total Program Budget	Start/ End	Notes
USDA	Forestry, feed grains, poultry, grain processing, tourism	\$16.5 million	October, 2010 to September, 2013	Increased price of wheat means that income likely to be closer to \$25 million allowing for a five-year program instead of a three-year program.
Gates	Soy	\$5.2 million	June, 2010 to December, 2013	
Ford Foundation	Eco Tourism	\$300 thousand	2009–2010	
Irish Aid	Coconut, Horticulture, Cashew	\$450 thousand annually	Annually Renewable	Inhambane Province
USAID	Fruit, Forestry, Cashew, Finance	\$ 775 thousand annually	2009–2012	Program is called Agri Futuro

TnsMz's current donor funding sources

Mozambique	2010	2011	2012
Current pipeline (weighted)	\$ 7,200,503	\$ 8,229,611	\$ 7,795,833
Wins secured to date	\$ 7,172,725	\$ 7,809,789	\$ 7,700,000
Additional funds to be secured to meet target budget	\$ 27,778	\$ 419,822	\$ 529,611
Target budget	\$ 7,200,503	\$ 8,229,611	\$ 8,229,611

TnsMz's funding growth over the past three years

8. STAFFING

TnsMz employs 63 people, divided about 50/50 between support staff and professionals. TnsMz offers neither orientation nor training to its new recruits. Rather, employees learn by doing and learn from each other. Established personnel learn from new employees, who are typically experienced professionals with abundant experience and with skills different that those which already exist in the organization. New employees are expected to share what they know with other staff in the course of the intensely interactive team work in which TnsMz specializes.

There is little staff turnover, but many of TnsMz professionals leave for short periods to start new businesses or take up special assignments in government or in new trade associations. For example, the chief veterinarian in the Ministry of Agriculture was Technoserve's poultry industry lead specialist while that industry was undergoing a recent renaissance. She now leads poultry industry development efforts from within government.

TnsMz maintains a revolving-door policy to encourage such behavior. As a result, its alumni association is extremely strong, and provides TnsMz with superior access, knowledge and influence.

Other distinguishing features of TnsMz are its organizational structure and the way work is assigned within that structure. The nonprofit organizes itself into teams, each of which is responsible for the development of specific agribusiness industries. Three sets of skills are typically included in each team: i) analytic skills in market research and finance; ii) strategic industry skills, which include knowhow and "know-who" derived from deep private subsector involvement; iii) specialized skills in specific areas that could be roadblocks to additional private investment or that relate to appropriate technologies within industries.

An important feature of TnsMz's organization is the thin and porous interface that separates team members inside TnsMz from industry leaders, industry associations and policy makers outside TnsMz. The nonprofit's ability to attract top-notch talent and to function on the public-private sector frontier is due in part to the porous nature of these interfaces.

TnsMz is subject to two sets of governance: That which applies as a result of contracts it enters into with donors, and that which fulfills its corporate responsibilities. Thus, the general manager of TnsMz reports to a regional director based in Accra, Ghana. Other reporting responsibilities affect cross-cutting, intra-corporate obligations such as regional market development and African branding and marketing to the global economy. Technoserve corporate has developed a pan-African cashew program, funded by the Gates Foundation. The ranking program officer is based in West Africa. Similarly, it has developed a regional fertilizer market development program based in Zimbabwe. TnsMz participates in both of these programs and in these contexts cross-border reporting relationships have been set up on an ad hoc basis. The ultimate reporting relationship of TnsMz, however, is to Technoserve's corporate board, which has a strong private-sector orientation.

9. NETWORK PARTNERS

For the most part, TnsMz plans, organizes and funds industry-level transformation itself. However, it attempts to engage outside partners in the actual implementation of these plans. TnsMz considers it essential to establish relationships early on with groups in each industry that can best effect needed changes or develop new competencies.

These inside principals have a strong incentive to get it right the first time and to learn from any failures. Even in non-industry specific areas of activity, like association building, TnsMz prefers to work with experienced partners. TnsMz has also developed symbiotic relationships with Photo Voices to monitor farm-level activities and use of new methods, and with McKinsey and Company to supply interns and of conduct special studies in benchmarking and industry-level competitiveness analyses. Technoserve is the largest nonprofit employer of former McKinsey staff.

10. CURRENT PORTFOLIO STRATEGIES

At any given time, Technoserve supports 30–40 incubatees in industry value-chain management programs. This support entails testing, refinement and integration of new value-chain configurations and new technologies. Approximately 50 percent of these industry-leading incubatees drop out over the program's five to eight year sector cycles. Most of this dropout results from failure to comply with contract terms, rather than business failure.

At a second level of incubation, each value-chain-level incubatee works with 50 to 100 separate farm-level organizations. These represent a second, nano level of incubatees.

Thus, a value-chain incubatee will manage small-scale matching grants or loan programs, which will bind farm-level producers to the chains and at the same time induce behavioral changes among farmer-suppliers, increasing the competitiveness of the entire chain. The commercial experiments that produce the best-quality product or highest margins for the chain then become the best-practice standard for the entire industry.

In this way, an entire agribusiness industry can be induced to move from a low-level equilibrium to a higher-level equilibrium, or to put it another way, from a competitively weak sector to a competitively strong sector.

Contracts between industry-leading firms and TnsMz entail the creation of a public good. Leading firms provide this public good in return for subsidies and supports. Part of each leading firm's responsibility under these agreements is to share information with other private firms that want to enter the sector and develop value chains of their own which incorporate best practice.

11. ACHIEVEMENTS

TnsMz has created metrics to outcome and impact realized within specific industries over time. Before a TnsMz programs takes effect, there is no cash economy and/or income within most rural spaces where an industry operates. Farmers barter their crops for other goods in local markets. No money transactions of any kind exist. No labor market operates and no sales are made to any buyers outside the immediate economic region.

That changes once TnsMz begins operations. Once cashew factories, for example, are organized to operate in a new area, sellers of raw nuts and workers in the factories both receive cash payments. At this point, the entire local economy begins to lift off. The economic multiplier effect differs from industry to industry, but once a cash economy is achieved, the tangible results can be clearly identified: Other micro enterprises develop, a labor markets takes root and people find other goods or services they can sell for cash.

12. CRITICAL SUCCESS FACTORS

<p>Strengths</p> <ul style="list-style-type: none"> • Inspired and inspiring leadership. A founder/leader who continues to raise the bar with respect to expectations. • Organizational design, staff selection and business culture are all designed to emphasize program agility, flexibility and opportunity responsiveness. • A institutionalized “know how” bred from repeated success in finding appropriate solutions to competitiveness challenges at the sector level....of translating challenges into solutions, which attract more private investment. • A method for indentifying priority impediments for growth at the sector level, which moves from the market backwards along the value chain and from participants within the chain to technology, critical input and service providers on the periphery of the chain. • Strong business linkages both within and outside Mozambique. • Strong creditability with key government officials at the national, provincial and local levels. TnsMz invented and continues to refine the advocacy process called “value chain federalism.” 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Continued operation over the long term depends on continued donor support. Dependence of USAID is particularly worrisome given the pressures on that agency’s budget. • Constrained somewhat in program focus and selection by priorities of donor organizations. For example, not able to work at facilitating a great leap forward by leveraging cutting edge biotechnology. • Not sufficiently tuned into the global picture. For example, not sufficiently focused on cutting edge technologies with agricultural relevance. • Not sufficiently engaged with issues of capital structure, sources of financing for agribusiness growth. • Limited internal ability to provide seed capital funding for incubatees.
<p>Opportunities</p> <ul style="list-style-type: none"> • Mozambique offers all of the soil, water and climatological advantages of Chile. Its agribusiness sector is where Chile’s was 40 years ago. • Enormous and growing interest exists among major global agribusinesses in Mozambique. Finding ways to respond to this interest, which are socially beneficial would open up new business opportunities and would allow TnsMz to diversify its revenue dependence. • Increasingly, the capture, transfer and full application of technology appropriate to rural space will entail cross border activities, participation in international networks and partnerships with foreign companies. • TnsMz’s strong working relationship with an enlightened government is only likely to increase in the future. TnsMz continues to add to its credibility and to its policy influence. 	<p>Risks</p> <ul style="list-style-type: none"> • The agribusiness ecosystem in Mozambique is changing more rapidly than in other SSA countries. Continuing to maintain currency is advice, strategic development direction and sector growth will become correspondingly more difficult and more complex. • TnsMz needs to maintain as low a public profile as possible in order not to put at risk both its superior position both with respect to policy dialogue and strategic direction. • Continuing to fund TnsMz’s growth will require increased financial commitments from donors, unless the incubator is able to change its business model and develops other sources of revenue.

13. LESSONS LEARNED AND IMPLICATIONS FOR AGRIBUSINESS INCUBATORS

- The founder/leader of an agribusiness incubator must trust the organization to work once it has been designed, staffed and set in motion. At that point, the founder/leader needs to commit time to priority issues that require the full investment of the organization's authority.
- Picking good people is particularly important. As noted above, Technoserve mixes local and expat experts into teams. It combines individuals with strong analytic skills on industry-focused teams with others who have deep knowledge and strong contracts within specific agribusiness industries.
- Once teams are selected, the founder/leader of the incubator needs to trust the team to perform within a framework of clearly defined goals and organizational values. Thus, for example, each agribusiness industry team at TnsMz develops its own logical framework, which specifies inputs, outputs, outcomes, goals and objectives. This framework defines performance expectations unambiguously for each new industry-development effort.
- One must study an industry's sources of competitive advantage before defining a development plan for the industry, or indeed before committing any significant resources. The lesson here is simply to understand the facts before committing resources.
- Once TnsMz begins its work of industry strengthening, needs typically emerge for specialized technical support, such as quality control management, logistics, or best global practices in conservation forestry. At this point Technoserve organizes industry teams that include specialists in critical competitive factors, in order to address specific dysfunctions.

14. FUTURE GOALS

TnsMz's future goals are to diversify its sources of income and to become more involved with directing and facilitating private-sector investment in Mozambique's agricultural sector, so that it is less dependent on donors. To this end, TnsMz has launched two initiatives: 1) To develop an agribusiness advisory service for foreign direct investors. 2) To launch of a set of agribusiness franchises, each of which will operate with lookalike business models, common technology and farm-to-market chain integrating impact.

TnsMz has also launched an initiative that focuses less on developing a specific industry and more on demonstrating the feasibility of organizing community-based agro-forestry in a sustainable way.

The program involves testing new modes of mixed-plantation forest harvesting and agricultural production in five areas of the country where the climate is suitable. The program entails the substitution of ecologically sustainable tree-harvesting methods for the slash-and-burn methods which currently prevail.

15. CONTACTS

Website: www.technoserve.org/work-impact/locations/mozambique.

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16. REFERENCE

Ronald Kopicki 2011 Background Case Study Technoserve Mozambique, a study conducted by Agrifood Consulting International (ACI) and Economic Transformation Group (ETG) for infoDev, Bethesda, 2011



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