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GROWTH FOR RURAL ADVANCEMENT AND SUSTAINABLE PROGRESS



Policy Brief on Rural SME Competitiveness and Sustainability Strategy for Sindh

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Policy brief on Rural SME Competitiveness and Sustainability Strategy for Balochistan

1. Introduction

Agricultural SMEs are central to Pakistan's economy. About 68% of Pakistan's population is directly or indirectly engaged with agriculture, which contributes 21% to the country's GDP, where livestock and horticulture account for 70% of national value-added agriculture. In Balochistan, agriculture accounts for 54% of the province's GDP with livestock rearing contributing about 40%¹. Agriculture sector also provides employment to about 65% of the labour force.

Given the sector's role in gender inclusive employment, food security and macro economy, improving the competitiveness of agricultural and rural SMEs can help Pakistan achieve Agenda 2030 and Sustainable Development Goals (SDGs) on poverty, hunger, gender, decent work and climate. Rural development, therefore, needs targeted support to public and private sectors, enabling rural SMEs and agribusinesses to become more competitive by making improvements at all levels of value chain, and ensuring conducive institutional and regulatory environment.²

2. Situation Analysis

Policy architecture for agriculture sub-sectors in Balochistan needs improvements, and in cases where adequate understanding exists, detailed strategies and action plans are needed for its effective implementation. Weak farming practices, high post-harvest losses and outdated technology are some of the cross-cutting characteristics that mark Balochistan's rural economy leading to low farm productivity and limited value addition at the SME level amid a weak business environment and institutional framework.

In addition, the policy formulation process is fragmented and would benefit from adoption of whole-of-government-approach. The sectoral and cross-sectoral policies as well as the federal and provincial regulations and policies are often not synchronized which should otherwise complement and supplement each other for enhancing enterprise competitiveness³.

The policies that have been developed would have benefited immensely from detailed researched inputs to address the technological, economic, commercial and cultural needs of the firms. The process of

¹ International Trade Centre, May 2020, Competitiveness of Rural SMEs and their resilience to Covid-19 crisis: Evidence from Balochistan, Pakistan. Hereafter: ITC 2020

² Rural SMEs are construed to be small scale farmers, input suppliers, or small processors where small and medium horticulture and livestock units are defined as: horticulture – small, up to 16 acres & medium, above 16 acres to 64 acres; livestock cattle – small, 1 – 5 animals & medium, 6 – 25 animals; and livestock goats – small, less than 30 animals & medium, 30 – 100 animals.

³ Food and Agriculture Organization, Feb 2020, Review of Agricultural Policies, Sindh and Balochistan. (internal study)

dialogue and consultation with the stakeholders has significant room for improvement to become inclusive and systematic. On the flipside, despite their large number, SMEs in general and rural SMEs in particular do not have a voice in policy formulation or implementation to ensure that rules and regulations accommodate their specific needs. The academics in Balochistan conducting research on these subjects are somehow also not part of the wider policy debates at the provincial government level.

Farmers are known to have weak bargaining power due to lack of cooperative organization, declining farm size, distance from market, lack of competition between buyers, reliance on buyers for credit. As a consequence, farmers' revenue is low relative to the market price of their produce, even though there isn't significant value addition across the farm to market value chain. Research indicates that about 85% of farmers in Pakistan do not have basic formal education, and 90% do not have middle level education; considering that Balochistan has highest rates of multidimensional poverty in the country, its farmers' capacity to understand information provided on good agricultural practices is the weakest.⁴

With the exception of few, most business support organizations in Balochistan's public and private sector are unable to effectively engage with constituents, conduct needs assessment; lack knowledge and skills to plan, implement, and monitor cascaded key performance indicators; lack robust standardized systems and processes for collecting, recording, assessing and reporting results; and do not have in place knowledge management processes and disciplines while client management systems are often rudimentary⁵.

From the perspective of livestock and horticulture, a few observations stand out: production practices are basic resulting in low yields; production units are small leading to low economies of scale; quality of inputs is poor and farmers are not abreast with best practices both to produce high volumes and to be environmentally sustainable; value chain is weakly developed with low value addition by intermediaries; insufficient interaction with non-farm agribusinesses; and reliance on informal sources of credit or personal savings rather than formal credit which makes them vulnerable to economic shocks.⁶

Amid these challenges, Government of Balochistan has shown resolve to move forward and aims to support supply chain activities like grading, packaging, seedling and production, by the enhanced development of rural farmer marketing collectives and mutual marketing organisations.⁷ Small and Medium Enterprises Development Authority (SMEDA) will also establish an agro-food processing facility to minimize post-harvest losses in horticulture produce.⁸

Backdrop to Covid-19

Assessing the direct impact of Covid-19 on Balochistan's rural economy is impaired by the fact that Pakistan does not officially produce sub-national GDP estimates. The problem is amplified because various official surveys and census, such as Census of Economic Establishments, Agricultural Machinery census;

⁴ Ahmed & Asif 2016, National Study on Agriculture Investment in Pakistan. Working Paper # 157, Sustainable Development Policy Institute.

⁵ International Trade Centre, undated, Cubed Institutional Assessment of Business Support Organization: Balochistan and Sindh provinces of Pakistan.

⁶ Support to horticulture and livestock will not be complete without also ensuring basic inputs and public goods necessary for rural SMEs. Therefore, a focus on water resource development, electricity, irrigation, unprotected knowledge and know-how becomes important.

⁷ "Balochistan crop yield up 25pc under Australian aid." DAWN. December 22, 2020.

⁸ "SMEDA plans agro-processing facility to promote export of fruits." The News. November 24, 2020.

Livestock Census; Mouza/Village Census and Agriculture Census, have not been updated for at least a decade; fifteen years in some cases.

Balochistan Government does not have integrated formal process for damage and need assessment. Accordingly, no sector-wise damage and need assessment was conducted during Covid-19, nor were estimates of the impact of Covid-19 on Balochistan's GDP, unemployment, or poverty calculated officially. However, the province's Planning and Development (P&D) department feared significant post-harvest losses of fruits⁹, and a fall in prices received by farmers in case of continuous lockdown between May-August. Independent studies estimated that 90% of those in agriculture were vulnerable to being laid off during the lockdown.

3. Methodology

To analyze the competitiveness of SMEs in Balochistan, this policy brief relies on ITC's SME competitiveness grid which focusses on the firms' capacity to compete by meeting current market requirements; to connect to buyers, suppliers, and institutions to obtain information and knowledge; to respond to market forces by investment in human or financial capital; to ensure long term competitiveness through gender inclusiveness and environment sustainability. These capacities have been assessed both at firm level and at the level of business ecosystem and regulatory environment, summary findings of which are in the next section.

To this end, in December 2019, the ITC collaborated with the University of Balochistan to survey agribusinesses and farmers in 7 districts. A follow-up phone-based survey concerning Covid-19 was carried out in May 2020, which (in September 2020) was followed by rapid review of regulatory and institutional response by Balochistan government to Covid-19. ITC in collaboration with a local policy think tank – Sustainable Development Policy Institute (SDPI) also engaged with the Government of Balochistan, business associations and representatives from rural businesses during a structured public-private dialogue to arrive at a better understanding of challenges amid Covid-19.¹⁰

This policy brief is the first step in the process of developing a Rural SME Competitiveness and Sustainable Strategy in Balochistan.

4. Findings

State of competitiveness in agri-food markets¹¹

Balochistan is beset by a host of problems that point to the need for investments in improved farm inputs as well as effective transportation and packaging of agricultural produce. For instance, 41% of livestock farmers surveyed depend mainly on low-cost feeding practices, while 15% rely on direct feeding. Scarcity of key inputs has an adverse effect on quality: half of interviewed farmers pointed to the unavailability of vaccines, medicines and quality inputs as the biggest challenge. As a result of poor access to storage facilities and weak transportation infrastructure for timely delivery given underdeveloped 'last-mile' connectivity, 71% of interviewed farmers said they do not store any produce, and a similar number said that their post-harvest losses were up to 10%. Only 25% of interviewed farmers had received advice from

⁹ Planning and Development Dept, Government of Balochistan (2020). "COVID-19: Balochistan Socio-economic Impact Assessment and Response Plan", unpublished and yet unapproved version

¹⁰ "SMEs critical for Pakistan's growth during present times". The Express Tribune, September 10, 2020.

¹¹ This section summarizes key findings from ITC 2020.

agricultural extension in the preceding year, while 63% of reported having no access to veterinary advice for animal medicines.

Connecting small farms with value chain

Balochistan's rugged terrain and long distances strain the linkages between value chain. But that's not the only reason why farmers earn abnormally low profits relative to other actors in the value chain; there is also significant information asymmetry. Only 25% of surveyed farmers said they use mobile phone to gather information on markets or pricing; most information comes from neighbours and traders. Only 41% surveyed farmers reported receiving good quality inputs, and only 20% said they always received their inputs on time. Around 47% of farmers belonged to a farmer association, of which 32% said no service was provided by the associations. Similarly, while about 75% farmers had accessed a public institution service, 43% of them rated them poorly.

Enhancing competitiveness of rural SMEs

Balochistan's farmers are constrained by weak skills, limited processing facilities and difficulties in meeting market requirements. Farmers shy from formal bank credit, relying instead on their own savings or informal moneylenders, which adds to their vulnerability. About 52% of surveyed farmers said their workers had sufficient skills, which given overall weak state of education and training in the province seems to be an overestimate perhaps due to lack of awareness of what it takes to be a skilled worker.

The absence of a proper grading system for livestock products means that farm-level investments in upgrading animal feeding and health do not always translate into better farm gate prices. Meat and dairy processing in the province are largely informal leading to low-margin products. Only 33% of the surveyed farmers said they had implemented some form of new technique or technology to improve production, while only 25% farmers, had switched to better seed varieties.

Social & environmental challenges to Balochistan's rural economy

The current rural economy ecosystem constrains the opportunities available to women. Women account only for 9% of total labour force, and are often excluded from decision making, education and marketing activities. Women in Balochistan are responsible for weeding, seed cleaning, drying, and storage of crops, mostly working on the land owned by men who usually control farm management decisions. Only 26% of surveyed farms were led by a woman, where women inclusion down the value chain is rarer.

In terms of sustainability, proliferation of deep-dug tube wells has lowered the water table, while inefficient water storage practices waste the rainwater, negatively affecting agricultural productivity over the long run. About 51% interviewed farmers said they had lost produce to drought, while 53% had lost produce to excessive rains. Some farmers are using technologies to address environmental challenges; 21% reported using mobile phones to access weather forecasting services. Most also use flood irrigation and other unsustainable irrigation methods, which underscores the need to rehabilitate traditional water management methods and adopt climate smart irrigation technologies.

Post-pandemic recovery

In Balochistan, 90% of those employed in the agriculture sector are estimated as vulnerable to being laid off during the shutdowns as lockdown-induced market closures led to fall in income and business closures. Nearly all of the agribusinesses (92%) and farms (92%) interviewed in May 2020 said their business operations had been affected by the pandemic, with 75% reporting as being moderately to strongly

affected. These businesses fear the worst as they anticipate the future waves of the pandemic. However, there is a clear intent to start focusing on the post-pandemic recovery and farm sector needs.

In terms of finances and working capital needs, the majority coped with the situation by using up their own savings or borrowing from informal sources, since neither do farmers prefer loans nor is bank credit available at a large scale – an area which needs careful attention as Pakistan implements the National Financial Inclusion Strategy. Outside of Ehsaas Emergency Cash Fund, most other relief measures announced by federal government were not applicable to livestock and horticulture farmers, in Balochistan, whereas those that were applicable to agri-businesses could not be availed due to low awareness. About 70% of the respondents said it was difficult to access information on business facilitation by government and central bank amid Covid-19.¹²

5. Policy recommendations

The competitiveness of private enterprises in Balochistan will heavily depend upon improvements to national-level business climate. In this regard, national initiatives including those by the central bank, federal-government's support through SMEDA or planned national-level SME policy will play a critical role in growth and sustainability of firms in Balochistan. Federal initiatives to spur growth of startups including Kamyab Jawan program and micro finance schemes could also play a role in this direction as well. The timely implementation of the promised PKR 600 billion federally-funded uplift program for Southern Balochistan will help connect the livestock markets of the province with major markets of the country through tele-education; modernize the agro-markets and increase capacities of those involved; improve water and electricity infrastructure; and develop e-commerce ecosystem in the province.

Balochistan already has a comprehensive and sufficiently forward-looking Livestock Policy and Strategy 2020-2030. BLPS 2020-2030 is oriented towards inter alia strengthening of markets, investment promotion, as well as introduction of new technologies and marketing innovation across the value chain to address growth, poverty and climate change.

In light of our survey, pandemic-related challenges, and needs of rural SMEs highlighted above, following are some of the key recommendations Balochistan government may consider. In our view, regulatory institutions, private sector associations, research bodies, civil society organizations, and development partners will have to join hands to support Government of Balochistan in the implementation of this proposed portfolio of interventions. While a provincial rural SMEs policy is need of the hour a sector-specific support package for horticulture is also much required.

¹² Lack of rapid assessment of credit worthiness and credibility of collateral is also known to be a concern by both potential borrowers and formal lenders.

No.	Need for change	Proposed action	Responsibility	Ongoing initiatives
General interventions proposed for both livestock & horticulture sectors				
1.	Addressing the gaps in regulatory ecosystem for both sectors	Undertake legislative work on updating and modernizing acts, rules & regulations. Harmonization of policy actions required across complimentary sub-sectors, including measures and procedures for land-use, sustainable management of farmlands. The latter necessitates policy measures for sustainable & efficient water management, administration and conservation, including procedures on water rights, uses & diversions, pricing & subsidy;	Agriculture and Cooperatives department (dept.) Livestock & Dairy Development dept. Irrigation dept. P&D dept. for support;	GRASP is supporting review/update of following acts: Cooperative Societies Act, 1925; Seed Act; Essential Commodities Act; Agriculture Resource Conservation Act; Balochistan Agricultural Produce Markets Act, 1991; Agricultural Pesticides Ordinance, 1971 Act.
		Expedite approval of (draft) agriculture policy; Work with relevant institutions towards formulation of rural SMEs strategy for the province.	Draft Agriculture Policy exists; GRASP can provide further technical support in its approval and also in development of rural SME strategy and its implementation.	
		Expedite work on regulatory improvements under existing livestock policy and prepare a medium-term actionable plan for horticulture sector, executed by delivery units within line departments. Support from federal government may also be available as Strategic Trade Policy Framework (STPF) aims at approaching new export markets for horticulture.	Line departments of livestock and agriculture. Planning & Development dept. (P&DD) for support.	GRASP has been requested by LDDD for support for Livestock Policy 2020-2030 implementation strategy and for developing sector plan.
2.	Develop and use public private partnerships (PPP) for the provision of public goods	Develop vanilla PPP structures for provision of public goods aimed at increasing competitiveness of	Line departments of livestock and agriculture, P&DD,	

No.	Need for change	Proposed action	Responsibility	Ongoing initiatives
		<p>horticulture and livestock. These may include: PPP for various certifications and standards such as grading and food safety risks (e.g. foot and mouth disease certification for livestock); logistics and market infrastructure; provision of electricity including from bio-gas and solar power solutions for farms and agri-businesses; and provision of minimum internet infrastructure.</p> <p>In line with BLPS 2020-2030 draft vanilla PPP structures to deliver ICT and other smart solutions-based extension services. In this regard PPP Unit has been established in P&DD and select line departments who may take forward this proposal.</p>	<p>Balochistan Board of Investment & Trade. PPP Units at agriculture department and P&DD can support.</p>	
3.	Improve farmers' bargaining power	<p>Strengthen farmer groups leading towards strong associations that help bargaining relationships between agri-businesses, middlemen and other stakeholders, and also provide critical input toward policymaking and its administration.</p>	<p>Line departments of livestock and agriculture. Local Government, Rural Development dept. with support from Agribusiness Support Fund</p>	
4.	Strengthen farmers' skill towards competitiveness, strengthening of value chain, and sustainability	<p>Roll out <i>train-the-trainers</i> outreach programmes on basic reading writing, counting, accounting, quality inputs, marketing, branding, niche markets, packaging, storage, primary processing, market mapping, logistics, smart phone usage, etc. with sustainability integral to all process. Training may be executed in</p>	<p>Line departments of livestock and agriculture; environment, sports and youth affairs dept.</p>	<p>GRASP AMIS can also be expanded for provision of mobile based/e-learning mode; short videos in local language on the mentioned skills can be</p>

No.	Need for change	Proposed action	Responsibility	Ongoing initiatives
		support with organizations on the ground and district commissioners.		developed and used for the purpose.
		Create smartphone-based training ecosystem in Urdu, Balochi, Pashto, and Brohi languages to train livestock and horticulture farmers on various aspects indicatively enlisted above. In districts where internet penetration is a constraint this training facility may be provided through mobile teams.	Relevant line departments; National Information Technology Board (NITB), National Incubation Center at Balochistan University of Information Technology, Engineering and Management Sciences (BUIEMS)	GRASP MIS will also contain learning videos on 'Good Agricultural Practice' on its website and mobile app
5.	Improve gender equality	Undertake legislation for living wage for female farm workers, with special quota for women in formally registered farm enterprises	Line departments of livestock and agriculture; women development dept.; Labour dept.	
		Include women in agriculture extension services. Selection of female farmers for subsidies and training may be proposed.	Line departments of livestock and agriculture; Finance dept.; Local Government & Rural dept.; women development dept.	
6.	Access to finance to farmers	The central bank in collaboration with Pakistan Banks' Association may expand the availability and ceiling of collateral-free finance; greater outreach required for giving confidence to potential borrowers for approaching banks; encouraging fintech sector to provide	State Bank of Pakistan (SBP); Pakistan Banks' Association; Zarai Taraqiati Bank Limited; micro finance institutions; rural support programmes;	

No.	Need for change	Proposed action	Responsibility	Ongoing initiatives
		innovative solutions in regions where banking network is weak. Combining technology with nano loans to speed up the lending process.	line departments; and national incubation center Quetta for fintech solutions. Fintechs that specialize in nano loans e.g. Tez Financial Services could offer advice	
7.	Effective utilization of government resources	Design criteria, rules & implementation framework for transparent, targeted subsidies for inputs such as seeds, fertilizer, and animal nutrition	Line departments of livestock and agriculture; Finance dept.	
Horticulture Sector				
8.	A formal policy or guiding document is needed to offer vision and drive medium to long term growth in the sector	Balochistan government needs to formulate horticulture sector policy where it may consider updating and announcing the yet unapproved Balochistan Horticulture Policy drafted in May 2008	Agriculture and Cooperatives dept.	
		It may also consider finalizing draft Agriculture Policy framed in collaboration with Food and Agriculture Organization (FAO). For regulatory constraints faced by this sector a rural SMEs strategy may be formulated.	Agriculture and Cooperatives dept.; P&DD can support formulation of rural SMEs strategy	
9.	Reduce information asymmetry	Create mobile-based information sharing ecosystem to allow farmers access to best information about prices in various markets	NITB in collaboration with Agriculture and Cooperatives department. Potential partners could include	GRASP AMIS initiative is also under process.

No.	Need for change	Proposed action	Responsibility	Ongoing initiatives
			private telecom firms and other software developers.	
10.	Better pricing for farmers	Revisit the role of intermediaries e.g. middlemen (<i>arthis</i>) through proper legislation, including registration, training and licensing / certification (minimum set of standards for middlemen to operate in the market)	Agriculture and Cooperatives dept.	
11.	Improve logistics to prevent post-harvest losses	Balochistan government may draft a policy to incentivize investments in value chain infrastructure. More specifically this could include looking in to cold chain and broader transport, warehousing, and storage facilities.	Transport department; P&D department	
12.	Improve quality of products to increase competitiveness	Introduce registration and certification of privately-operated pack houses / collection centers / added value centers and privately operated wholesale markets with government in a supervisory role	Agriculture and Cooperatives dept; P&D department	
		Introduce minimum, value-chain-wide accepted quality and grading standard for fruits and vegetables	"	
		Develop and implement customized Good Agriculture Practice in line with global standards. For exporters facility of affordable testing and certification may be made available	"	
Livestock Sector				
13.	Enable exportability and improve productivity	Establish FMD-controlled zone and licensing regime for livestock tagging under PPP mode whilst fast-tracking the	Livestock & Dairy Development dept.	Summary under process and request of LDDD sent to Board of Revenue for

No.	Need for change	Proposed action	Responsibility	Ongoing initiatives
		plans to set up Milk and Meat City in Lasbela and Quetta as pilot projects		identification of land for the proposed Milk and Meat Cities.
14.	Improve nutrition and clean-in-place practices at livestock farms	Strengthen livestock extension services with emphasis on women as extension staff Certification and legislation of Village Animal Health Workers for introduction of minimum set of standards Increase prevalence of contracts between upstream and downstream value chain actors to help sharing of information and training of livestock farmers by dairy/meat businesses	Livestock & Dairy Development dept.	
15.	Improve quality of meat to increase competitiveness	Legislation of privately operated certified slaughterhouses with government in a supervisory role	Livestock & Dairy Development dept.	GRASP supporting the department to develop manual (including SoPs) for slaughterhouses as per international best practices.
16.	Foster competition in dairy market	Deregulate milk prices currently regulated by Local Government department	Balochistan Cabinet and Local Government & Rural Development	
17.	Promote formalization of dairy market	Promote packaged & branded milk by raising awareness and facilitating small scale pasteurization units	Livestock & Dairy Development dept.; Balochistan Board of Investment & Trade	
18.	Streamline coordination mechanisms to implement livestock and agriculture policy measures	Design mechanism to improve coordination between the concerned departments both at policy and implementation level	Balochistan Cabinet and relevant line departments	

Conclusion

Vibrant rural SMEs are critical to absorb Balochistan's workforce, develop rural economy, and reduce poverty by increasing the supply of primary products with consistency of quality to meet rising domestic demand and to tap the export potential. The province requires an effective support from federal government and central bank to improve overall business climate and regulatory regime for domestic commerce. An early formulation of federal SME policy could help clear the funding, finance, and inclusion related challenges as well. All this will be in line with the ambitions laid down in the National Financial Inclusion Strategy; priority SDGs framework of the Planning Commission; the upcoming Strategic Trade Policy Framework that envisages growth in export of fruits, vegetables and processed food and beverages¹³. Such an approach also compliments the Prime Minister's vision for rural SMEs and chicken and eggs production initiative¹⁴, distributing livestock animals across rural women population¹⁵; and the recently launched Honey Tsunami Program¹⁶.

This intent and planned developments under Southern Balochistan package by the federal government are set to kickstart a new era in private sector development across the province. It will therefore be timely for the provincial government to provide policy certainty for the medium and longer term through early formulation and approval of a rural SMEs strategy.

As a policy document, BLPS 2020-2030 offers comprehensive approach to key reform objectives. However, an effective rural SMEs strategy aimed at specific five-year action plan is also needed to be spelled out by provincial government alongside specific action plans and roles and responsibilities of relevant departments. To this end, the above recommendations will yield effective implementation of both BLPS 2020-2030, and help toward the much-needed formulation of horticulture policy and a coherent regulatory framework drafted through dialogue and consultation.

While most of our recommendations are specific to horticulture and livestock sectors, it is important to note that there are also some structural recommendations which will require attention of provincial leadership. Most notably, these include the need to improve essential capabilities for demand and use of evidence for policy decisions in line departments; to plug data gaps which impinge timely decision making; and the need to create mechanisms for, and hold, structured public private dialogue, which is necessary to help businesses see longer term gains in these sectors.

¹³ <https://nation.com.pk/24-May-2020/strategic-trade-policy-framework-to-increase-exports-to-dollar-46b-in-5-years>

¹⁴ <https://tribune.com.pk/story/1860121/1-following-pms-chicken-egg-vision-govt-kicks-off-poultry-campaign>

¹⁵ <https://www.thenews.com.pk/print/617618-more-good-news-for-people-buffaloes-cows-and-goats-for-women-says-pm>

¹⁶ <https://www.dawn.com/news/1597047>

ABOUT THE PROJECT: “GROWTH FOR RURAL ADVANCEMENT AND SUSTAINABLE PROGRESS (GRASP)”

ITC is the lead implementing agency for the “Growth for Rural Advancement and Sustainable Progress” project, funded by the European Union (EU). The project objective is to support gender inclusive income and employment generation, enhanced productivity and profitability of SMEs involved in primary production, service provision, and value addition in and around selected clusters of production. GRASP will intervene in two of the agriculture sectors i.e. Livestock and Horticulture sectors in Sindh and Balochistan. For complementary survey results please visit:

www.intracen.org/GRASP/

For preparation of this policy brief and proposed recommendations, ITC has collaborated with Sustainable Development Policy Institute (www.sdpi.org).