



# **PO 40099270: External Review of the Building Effective and Accessible Markets (BEAM) Programme**

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Submitted by  
**WYG International Limited**



## Acronyms

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ANDE	Aspen Network of Development Entrepreneurs
ASOCAM	Latin American platform for knowledge management for development in rural areas (direct translation not available)
BEAM	Building Effective and Accessible Markets
BFP	Business Fights Poverty
CGAP	Consultative Group to Assist the Poorest
DCED	Donor Committee for Enterprise Development
DFID	Department for International Development
E&I	Employment and Income
IDS	Institute of Development Studies
ILO	International Labour Organisation
KIIs	Key Informant Interviews
LEO	Leveraging Economic Opportunities
M4P	Making Markets work for the Poor
MaFI	Market Facilitation Initiative
MOC	Management Oversight Committee
MOOC	Massive Open Online Course
MSD	Market Systems Development
PSD	Private Sector Development
QA	Quality Assurance
SAP	Strategic Advisory Panel
SDC	Swiss Agency for Development and Cooperation
SEEP	Small Enterprise Education and Promotion
SRO	Senior Responsible Officer
TOC	Theory of Change
TOR	Terms of Reference
USAID	United States Agency for International Development
USP	Unique Selling Point



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# 1 Executive Summary

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The BEAM (Building Effective and Accessible Markets) Exchange (or 'BEAM') is a UK Department for International Development (DFID) and Swiss Agency for Development and Cooperation (SDC) funded facility for knowledge exchange and learning about the role of market systems approaches. BEAM has been tasked with building a vibrant community among policy advisors, consultants, practitioners and businesses, to support those who design, manage, implement and evaluate market systems programmes with an aim to use this approach to reduce poverty.

This external review is aimed at helping BEAM to better support the development community by strengthening and extending the application of market systems approaches, through supporting the spread of good practice and facilitating the sharing of lessons, evidence and experience. The Review team attended the 2016 BEAM annual conference in Lusaka and undertook a series of key informant interviews (KIIs) during May/June 2016. A diversity of views was sought from conference attendees as well as selected other BEAM users. Key informants were a mix of market systems practitioners, donors, designers of market systems development projects and 'thought leaders' from within the market systems development (MSD) community of practice. Some BEAM staff were also selected for interviews.

Among KII respondents, there is a clear mandate for the continuing existence of BEAM and wide recognition that it has been well-resourced (especially in relation to its predecessor M4P Hub), which is reflected in its achievements to date and demand for an ongoing work programme from BEAM's audience. Feedback from the respondents was generally positive, with responses from all groups constructively critical in their suggestions. There was very widespread positive comment regarding the BEAM team's efficient running of the BEAM 2016 conference and the responsiveness of the team generally in managing BEAM.

This review presents 34 recommendations; which is reflective of the wide range of views and suggestions collected from respondents rather than of the progress that BEAM has made. The findings and recommendations of this review are largely distilled from the data the review team collected from the KIIs. Some of the recommendations made in the review may reflect work that is already being progressed by BEAM. Where this is the case this reflects the independent and external view point of the review team; and demonstrates that BEAM are in contact with their market and working to meet their preferences and requirements.

Section 3 of the report presents the findings and recommendations of the review arranged in corresponding order to the output and outcome indicators of the BEAM logframe. Section 4 provides a short, discursive narrative around a number of dichotomies which emerged from the review, illustrated with quotes. Section 5 brings the recommendations set out in Section 3 together into three illustrative scenarios, Low, Central and High, relating to possible funding envelopes for BEAM following the end of Year 3 in 2017.

BEAM was felt by most KII respondents to complement rather than compete with other platforms. Central to BEAM's uniqueness is its strong market systems focus, its breadth and scale and the diversity of its user base.

BEAM's audience very broadly falls within one of two main camps; implementers or donors. Other sub-groups include policy makers, academia, and influencers, including the media. An important recommendation for BEAM going forward is to embrace these audiences, but to do so as clearly defined market segments so each segment can identify strongly with BEAM.



As a knowledge broker, BEAM could develop a stronger quality assurance (QA) system and peer review mechanism across all knowledge material (externally sourced as well as commissioned or self-generated material). There is demand for more practical, project-based information, guidance and examples and a suggestion that BEAM could develop its interactive methods of delivery both on the BEAM website and through events. This report provides a number of specific recommendations around BEAM's role in facilitating the delivery of skills development and learning resources. This includes suggestions for strengthening BEAM's role in facilitating peer learning on a devolved or regional basis.

Implementers regard the resources on the BEAM website as reliable and one of the most valuable aspects of BEAM. There is divided opinion from BEAM users as to whether there is now sufficient evidence on MSD or indeed if there is much more good evidence to be had. Some thought that BEAM should turn to synthesising and presenting the evidence already available in a user-friendly, practical format. There was consensus that BEAM is in a unique position to not only gather evidence, but also to collate, synthesise and add value to it.

BEAM has identified a number of thematic priorities to guide its current work. These need to reflect the needs of the community members. It may be necessary to develop separate thematic areas that reflect different needs of different community sub-groups. There was some concern from KII respondents about the thematic areas being seen as directive rather than facilitative. In the report, the approach BEAM should take (directive versus facilitative) is discussed along with other 'dichotomies' that emerged from the review.

There was demand from KII respondents for BEAM to develop a clear definition of MSD. Such a definition would most likely need to appeal to a 'broad church' of MSD practitioners. There was a related call for BEAM to increase accessibility to BEAM. BEAM should simplify and clarify its language wherever possible and reduce jargon.

Among the recommendations addressing BEAM's effectiveness at outcome level, is the suggestion that BEAM determines the range and depth of skills needed in the sector. BEAM could also provide mechanisms for recording lessons learned on MSD, including failures, to combat 'institutional amnesia'. It is further recommended that BEAM creates a donor / commissioner section on its website. BEAM could also take steps to increase connectedness between individuals by convening small, focussed, interactive groups to coalesce around specific topics within 'mainstream' and non-traditional MSD fields. By working through intermediaries (e.g. regional networks), BEAM could extend its reach and effectiveness.

KII respondents felt that BEAM could draw more from its institutional partners, particularly the Institutional Development Studies (IDS), and from the expertise of BEAM's Strategic Advisory Panel (SAP) members. They also felt that in future BEAM could facilitate academic engagement to develop the MSD discipline and help clarify the economic theory that underpins the MSD approach. BEAM's remit could broaden to apply MSD in other areas such as the provision of basic services. It is recommended that BEAM seeks fresh sources of contributory funding to complement core funding. A broader range of BEAM advocates or 'champions' should also be sought.

Overall, there was widespread appreciation from BEAM users for the professionalism of BEAM and its achievements to date when compared with its predecessor, the M4P Hub. BEAM's outputs are valued, and there was very positive engagement from consultees for this review; particularly relating to how BEAM could be improved for the future. Three illustrative scenarios presented in the report provide a framework for viewing the review's recommendations in terms of relative priorities depending on future available resources.



## 2 Objectives of Review and Methodology

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### 2.1 Structure of the Report

This report presents an external review of the Building Effective and Accessible Markets (BEAM) programme. The current section of the report sets out the background and objectives of this review as well as the approach and methodology taken. Following this, the findings and corresponding recommendations of the review are presented in Section 3. Section 4 is a short, reflective section providing additional insights on dichotomies that have emerged from the review, that provide context to Section 5. Section 5 presents three potential extension options and provides a platform for further discussion around the future of BEAM. For reference, BEAM log frame indicators are provided where relevant in section headings.

### 2.2 Background and Objectives of the Review

The BEAM Exchange (or 'BEAM') is a donor-funded facility for knowledge exchange and learning about the role of market systems approaches. BEAM has been tasked with building a vibrant community among policy advisors, consultants, practitioners and businesses, to support those who design, manage, implement and evaluate market systems programmes.

DFID require an external review of the Building Effective and Accessible Markets (BEAM) programme to consider progress in depth two years in, and to inform whether any changes in direction or approach might be needed. This external review is aimed at helping BEAM to better support the development community by strengthening and extending the application of market systems approaches, through supporting the spread of good practice and facilitating the sharing of lessons and experience.

The objectives of the review were clearly laid out in the terms of reference (TOR) for the review and are summarised as:

- i. Assess BEAM's progress against log frame objectives;
- ii. Evaluate the assumptions in the BEAM's theory of change (TOC);
- iii. Recommend revisions to the programme design and implementation;
- iv. Identify priorities in the programme's current work, with relation to considerations of sustainable exit for donors, and;
- v. Review the programme's plans for potential extension options should further funding be secured.

### 2.3 The Review Team

Ewan Snedden, Review Director and Principal Consultant headed the project team. Gordon Freer acted as the Technical Lead while Michelle Moffatt acted as the Project Manager providing research and administration support.

### 2.4 Review Approach and Methodology

The review was conducted using evidence gathered from a desk-based review of BEAM and associated documentation, attendance at the BEAM Exchange Conference, and Key Informant Interviews (KIIs) undertaken in May/June 2016 with selected individuals.

BEAM held their first annual conference on May 2016 in Lusaka, Zambia. This provided an opportunity for the review team to understand more about BEAM and meet with potential key



informants. In preparation for the Conference, BEAM shared documents with the review team, which provided historical context and background on BEAM, including the original business case, the original TOC and log frame. Initial discussions with the BEAM Exchange Director, Mike Albu, provided additional context to changes made within BEAM to reflect the strategic direction of BEAM. Further discussions with the BEAM internal monitoring and evaluation team early in the review process facilitated the review team's access to recent monitoring data gathered by BEAM.

Key informants were a mix of market systems practitioners, donors, designers of market systems development projects and 'thought leaders' or influencers from within the MSD community of practice. Some BEAM staff were also selected for interview. The TOR for the review required that a minimum of twenty KIIs be conducted with market system practitioners. Following discussions with BEAM staff and with the DFID Senior Responsible Officer (SRO) a list of fifty-six potential respondents was compiled. While the initial list used the Conference delegate list as a foundation, a number of key individuals who did not attend the conference were also identified as key informants. Thirty-nine KIIs were completed (see list of KII respondents, Appendix 6.2).

Questions focussing on the purposes of the review were provided in the review TOR. The review team developed KII interview questions reflecting the essence of each of these, then developed a matrix reflecting the roles of the market system practitioners who would be KII respondents; resulting in four categories; Commissioner, Designer, Implementer, Influencer.<sup>1</sup> Each interview question was then matched against these role categories, ensuring that questions were appropriate for the respondents.

The review team ensured that the KII respondents were representative of the different categories of market system practitioners. Given the small number of planned KIIs, the team did not seek to ensure that these representations were statistically representative. The review team rather followed a purposive selection methodology where potential respondents within each role were identified, with a view that these individuals would be able to provide significant qualitative input. A maximum variation sampling approach was then applied with respondents being selected that were purposefully as different from each other as possible.

All of the KIIs were conducted in English by telephone or using Skype and were recorded with the permission of the respondent. In the interests of confidentiality interviewees names and roles have been anonymised in the presentation of findings in this report.

## 2.5 Data Analysis

All recorded interviews were transcribed and thematically analysed using a computer assisted qualitative analysis program, Atlas ti. BEAM documentation was also thematically analysed.

The thematic analysis used deductive coding and was initially conducted across all of the data using themes drawn from the review questions. The data was then separated by respondent role categories and a second round of case-based thematic analysis was conducted.

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<sup>1</sup> These categories were subjectively allocated, in some cases to more than one category, by the review team on initial selection of the respondents. The categories were explained to the respondents in interviews, and when a respondent suggested that they might be best categorised differently, this change was incorporated during the analysis. Influencers are regarded as thought leaders in the field and includes respondents from donors, think tanks and consultancies.



## 2.6 Limitations to the Review

Any evaluative process has its limitations. While the maximum variation purposive sampling approach allowed the review team an opportunity to capture a range of views from various respondents, which the team felt would add the most value; it is recognised that this sampling approach can reflect researcher bias. Indeed, even using the conference delegate list as a foundational document for KII selection allows for some self-selection bias. This risk was mitigated through a reiterative process of reflecting on the identified potential respondents with both DFID and BEAM with the aim of getting a diversity of views.

Because those KII respondents were drawn from a purposive sample, their comments also cannot be assumed to reflect the perspective of the market systems population as a whole, or even of the organisations represented by the respondents. Therefore, the findings refer only to those interviewed. Similarly, given the small sample size for the qualitative interviews, the responses cannot be held to be statistically representative.



## 3 Findings

### 3.1 BEAM's Unique Place in the Market Systems Field

Users of BEAM also access a range of other network organisations. These are clearly linked on the BEAM website and the most frequently mentioned during this review were the Small Enterprise and Education (SEEP) Network, Donor Committee for Enterprise Development (DCED), Leveraging Economic Opportunities (LEO), Microlinks, the Market Facilitation Initiative (MaFI) and the Consultative Group to Assist the Poorest (CGAP). Others also mentioned included the Springfield Centre, Aspen Network for Development Entrepreneurs (ANDE), ASOCAM (Latin American platform for knowledge management for development in rural areas), Business Fights Poverty (BFP), Lab-Market and the Swiss Agency for Development and Cooperation (SDC) Employment and Income (E&I) Network.

Overlap and competition with other networks and sites is not felt by KII respondents to be a significant issue since none are felt to have the precise remit of BEAM, and cross-referral between platforms is common. A minority view was to question the rationale of developing a website that is always going to need revenue funding instead of building on others that are already running. Some respondents thought there to be some overlap between BEAM, DCED and MaFI, on LinkedIn discussion groups.

BEAM's uniqueness was mostly expressed by respondents in terms of its strong focus on market systems. This is seen as a key strength to build upon. Second, its strong European influence is regarded as bringing a welcome balance among all the network organisations in existence. This is less because of BEAM's unique purpose and more because of the networks and groups of people BEAM is able to access.

#### **Recommendation 1**

Continue to build on strong brand awareness and maintain a strong market systems focus, which is central to BEAM's unique selling point (USP).

One respondent contrasted SEEP and BEAM in terms of a more 'top-down', systems-level approach (BEAM) versus a 'bottom-up', practitioner focus (SEEP), but stated that in combination the two platforms complement one another very well. This theme of complementarity rather than competition was echoed by another respondent who described the mutually reinforcing benefits of having BEAM and LEO 'in the same space' but on opposite sides of the Atlantic.

#### **Recommendation 2**

Examine the implications of LEO's funding ending in September 2016, and explore opportunities for BEAM to make good any loss of momentum in promoting market systems development. Examine the possibility of curating existing LEO resources.

Unlike BEAM which organised its own 2016 conference in addition to all its other functions, LEO works in cooperation with SEEP and is therefore able to draw upon and signpost to the SEEP annual conference. The breadth and scale of BEAM is reflected in comments from KII respondents around the wide range of opportunities for different kinds of engagement provided by BEAM, and the wide range of users on BEAM in comparison to other platforms.



Therefore, BEAM's scale is one of its defining characteristics. The value of what BEAM users get out of BEAM is related to what they put in to it as participants.

**Recommendation 3**

Clearly promote BEAM's unique range and depth of functions, specifically emphasising its role as an exchange among active participants.

One respondent's comment reflected on the perceived 'supply side' approach to knowledge delivery that BEAM employs, compared to DCED's 'demand side' approach, which involves finding out what knowledge its audience needs and then providing it.

It was with reference to the DCED that most mention was made by respondents to potential overlap, or uncertainty as to why BEAM should be a stand-alone platform. However, the two platforms are perceived by most as having different goals - DCED is perceived as having a results-based focus through promotion of its DCED Standard for Results Measurement, whereas BEAM has a focus on market systems and a larger remit such as its engagement with practitioners. There are other important differences such as the way the two platforms are constituted and funded, which may not be obvious to casual users of the sites.

It was felt that although many topics overlap between platforms, users appreciate the strong international mix of BEAM, in comparison to the USAID-focus of Microlinks and LEO. DCED is seen as being focussed more around results measurement whereas SEEP's focus is broader, but both are largely seen as coordinating well with BEAM.

BEAM is perceived by most respondents to be neutral in its promotion of access to information, although this position has been criticised by some, and commented on by others, who would prefer BEAM to adopt a more directive approach; e.g. taking a leading role in quality assuring information about MSD, and in stating what direction the MSD community should be moving in.

**Recommendation 4**

Maintain a focussed dialogue with DCED to ensure that overlap is minimised, opportunities for positive linkages are fostered and the uniqueness of both platforms is communicated to users.

Recognising that BEAM is a collaboration between implementing institutions, some respondents felt that current BEAM operations and outputs do not reflect the full capacity of these institutions' potential contribution. Respondents suggested that rather than relying on their respective strengths, some of the partner institutions were involved in the management of BEAM.

*"IDS of course are involved in the BEAM Exchange but they seem to be...managing rather than actually intellectually contributing."*

**Recommendation 5**

Build on the strengths of BEAM's institutional partners to capitalise fully on their contribution to BEAM's activities and outputs.



## 3.2 Implementation

The MSD audience is wide-ranging and diverse in its needs and expectations of BEAM. Most respondents generally saw the audience in one of two camps; implementers or donors, while a few saw other sub-groups embracing policy makers, academia, and influencers, including the media. Even within the two-camp school, it is acknowledged that there is considerable disparity within the two groups. In the case of the implementers, this includes variations in values of programmes being implemented, and in the levels of responsibility of programme team members. In the case of the donors, there is variation from supporters to sceptics or between the “converted and the non-converted”.

### Recommendation 6

Segment BEAM products and services according to (anticipated) audience-specific needs. Distil and provide evidence in a variety of formats for a variety of purposes and for different user groups.

Since its inception, BEAM has shifted its process of implementation from direct delivery to facilitation of delivery, in keeping with the MSD paradigm.

### Recommendation 7

Facilitate the collection and distillation of needs within the MSD environment then relay and engage with the donor community on processes to meet these needs.

### 3.2.1 Knowledge Brokering (Output Indicator 1)

BEAM’s knowledge brokering activities include generating new knowledge assets, supporting synthesis/codification of existing knowledge into knowledge assets, and facilitating access to these and other existing information about market systems development. On the BEAM website, it includes notice boards, guidance pages and a resource library.

Many KII respondents focussed on this being the primary purpose of BEAM – to act as a repository of information, some of which might be generated by BEAM. Most respondents spoke of “dipping into” BEAM rather than being “involved”.

BEAM’s role as a quality assurer (QA) of this information was a point of contention amongst respondents. Many implementers saw BEAM as a source of information on good practice, while some others (often Designers and Influencers) raised queries regarding BEAM’s QA role. It was acknowledged that BEAM applied QA to commissioned or self-generated pieces, but that this standard was not necessarily applied to externally generated documents, providing possibly less robust documents to an audience who may not have a capacity to filter and discern good practice from “less-good” practice. BEAM has developed a QA process but has not fully communicated this to its audience.



**Recommendation 8**

Publicise the BEAM QA procedure for information sources included on BEAM’s website (including BEAM’s own commissioned and researched pieces, as well as the material BEAM curates). Ensure that this procedure, while of a high standard, is accessible and implementable to the wide range of BEAM users and potential contributors to encourage ongoing programme level contribution.

**Recommendation 9**

Examine the possibility of using a peer review mechanism, especially to QA knowledge products included on BEAM’s website.

Respondents recognised that using a website as a delivery and interaction method for sharing knowledge, while cost effective, had limitations especially for users who do not have time or do not want to read large quantities of information. This limitation was also identified as a potential barrier to widening the pool of contributors to include users who were less confident in their use of English.

**Recommendation 10**

Develop communication channels that meet the needs of a wider range of users including the use of video and audio.

The website itself was recognised by users as being an improvement on previous iterations, and on other, similar platforms, but it was also suggested that there is opportunity for improvement, notably in the “intuitiveness” of navigation around the website. It was acknowledged that having a wide range of resources available was valuable but also created a challenge in facilitating a user’s navigation through the site. Users also requested that more pragmatic, practical information, drawn directly from projects’ experiences be made available on the site.

**Recommendation 11**

Increase the amount of practical, project-based information on the BEAM website.

**Recommendation 12**

Continue to refine the website to improve its usability and dynamic functionality including through suggesting additional resources, based on the user’s history.

Some respondents requested more tools from BEAM. Others felt that there were sufficient tools provided but that these needed to be adapted through implementation; and suggested the development of any new tools needs to be simple, tested by projects and provided in an adaptable format. BEAM’s role in the development of tools speaks to the debate about whether BEAM’s role should be facilitative or more directive. This debate is discussed further in Section 4.2 below.



### 3.2.2 Skills Development (Output Indicator 2)

BEAM aims to facilitate (but not directly provide) the supply and up-take of market systems skills development and capacity building services in response to a perceived under-supply in the market place.

There is an expressed need for improved skills among all the respondent groups, with a tendency to focus on programme implementation staff. Within programmes, while there is an expressed need from team leaders for skills development of their staff, there appear to be few opportunities available to these individuals to engage with learning opportunities. Where such opportunities are provided they are often not in the most appropriate methodology, perhaps reflecting the educational assumptions of the developers rather than the needs of the target audience. This speaks to the areas of expertise of the course developers. While they may be experienced in MSD material and processes, developing training (and assessment) material in any field requires knowledge of and experience in pedagogical methodologies.

Specifically, there was a call from respondents to make more use of videos, audio, short downloadable chunks of information, and to provide interaction with the trainer outside of prescribed webinar timeslots.

#### **Recommendation 13**

Facilitate the development of skills courses that are short, utilise appropriate pedagogical methodologies that reflect the diversity of needs within the MSD audience (especially amongst programme staff), and are focused on the most common problems faced by field practitioners (e.g. team recruitment and development).

#### **Recommendation 14**

In partnership with an established educational institution, explore the possibility of running a MSD Massive Open Online Course (MOOC).

Some respondents spoke to the lack of a reading culture among programme staff and suggested that capacity building initiatives focusing on this as a delivery mechanism were ineffectual. While some respondents proposed that BEAM look to pushing back the boundary of skills development; exploring and innovating in new areas, others suggested that BEAM focus on current needs, but adapt the current pedagogical methodologies.

### 3.2.3 Peer Learning (Output Indicator 3)

BEAM's support for peer learning includes facilitating opportunities and spaces for dialogue, knowledge sharing and networking (e.g. webinars, peer-to-peer learning events in Tanzania, Nigeria and Nepal, discussion groups and the 2016 Lusaka conference).

While BEAM facilitates skills development and capacity building initiatives, it was suggested by some KII respondents that it also looks to draw upon the existing, practical knowledge of its own audience and utilises this through the facilitation of communities of practice. Several respondents spoke about developing regional networks of learning and practice exchange. BEAM has moved some way towards this in working with ASOCAM in Latin America and with both a Nepalese and Bangladeshi market development forum.



**Recommendation 15**

Facilitate and support regionally based communities of practice which focus on building regional capacity, using regional expertise and discussing regional concerns and problems.

**Recommendation 16**

Establish competency based communities of practice where individuals with the same areas of interest and responsibility can engage directly with one another.

**Recommendation 17**

Explore the possibility of facilitating mentoring relationships between experienced and developing staff or peer-to-peer support relationships (especially in the same region) using a platform such as mentorcloud.

The Lusaka Conference was regarded a highlight event, and great value in terms of learning as well as networking. Suggestions were made regarding the delivery and content of the conference, but it was agreed that this should be a regular event on the MSD calendar.

**3.2.4 Building Credibility (Output Indicator 4)**

BEAM aims to strengthen the availability of credible evidence for market systems approaches. BEAM activities in pursuit of this aim include developing an evidence map, evaluation guide, various synopsis papers and organising evidence-related speakers and conference sessions.

Implementers regard the resources on the BEAM website as reliable and one of the most valuable aspects of BEAM. This creates an expectation regarding the information that is likely to be available on the website. There is considerable discussion about whether there is a need to provide more evidence about the MSD approach. Many KII respondents are of the opinion that there is sufficient evidence in place (given that the approach has been implemented for over a decade), but that it needs to be synthesised and presented in a user-friendly manner.

*“This is no longer the new approach ... I’m absolutely convinced that we can learn things by looking in a more systematic way at a portfolio of past programmes and feed that knowledge back into good practice.”*

Respondents recognised that contexts might differ for different applications, but that good practice, with reliable evidence, would provide foundational learning.

**Recommendation 18**

Synthesize the findings of MSD related programme research to determine what has worked (and not worked) effectively, and compare these results against other non-MSD programmes.



Some respondents spoke about BEAM building on the DCED evidence map, without first critically engaging with the same to ascertain its inherent value and expressed concern about the message this conveyed regarding the applied intellectual rigour of BEAM. While there was a call from respondents for a synthesis of the already gathered evidence, it was also suggested there is a need for BEAM to engage with stakeholders, notably academics in the field to push the boundaries of knowledge and to develop the discipline further.

**Recommendation 19**

Facilitate academic engagement with BEAM to develop the MSD discipline and to engage critically with existing evidence to bolster the credibility of the market systems approach.

There was some comment from respondents regarding how challenging it can be to coax evidence out of certain organisations, perhaps owing to such evidence being regarded as intellectual property by commercial consultancies, or hard-to-reach within institutions. Other respondents queried how much good evidence there really is around MSD. There was also discussion around what makes evidence persuasive – the qualitative narrative, the discourse of a credible practitioner or perhaps ‘robust’ quantitative studies. There was consensus among respondents that BEAM is in a unique position to not only gather evidence, but also collate it, synthesise it and add value. In some instances, this may be stripping findings down to practical ‘nuggets’; in others it may be organising peer review and in yet others it may be synthesising evidence from disparate programmes into a cohesive consolidation.

### 3.3 Thematic Priorities

BEAM has identified a number of thematic priorities to guide its current work including practitioner’s challenges, women’s economic empowerment, adaptive programming and systemic monitoring and evaluation. While some KII respondents felt that BEAM reflected the needs of the sector participants and a capacity to listen to their needs, there was some concern about these areas being seen as directive rather than facilitative.

Practitioner’s challenges were frequently mentioned by respondents especially with regards their human resources and skills development. Some implementers identified BEAM as their first point of reference for new programme level staff. Some respondents suggested that informal training is not sufficient and that there is a need to formalise training, but also to ensure that it is practical and applicable.

**Recommendation 20**

Ensure that future thematic areas reflect the needs of the community members and, if necessary, develop separate thematic areas that reflect different needs of different community sub-groups.

A need was also identified by respondents to stimulate practitioner learning – i.e. to encourage practitioners to innovate and critically self-reflect on their innovation, rather than to simply implement learned approaches that have been applied elsewhere.



**Recommendation 21**

Encourage reporting on examples of innovation and its application within programmes (even failures) to stimulate greater learning opportunities.

BEAM is drawing interest from PSD professionals (sector development, impact investors, private equity, and microfinance). Respondents felt that MSD should be carefully defined so that the discipline can develop, but that M4P as a descriptor may be overly restrictive. There is evidence of increasing MSD interest in sectors that are regarded as non-traditional, and BEAM should continue to pursue involvement in these areas.

**Recommendation 22**

Develop a clear definition of MSD. There could be a 'core' definition and 'wider relevance' definition. These definitions would allow the discipline to develop alongside so-called 'non-traditional' fields and wider PSD approaches, which could include health, education, youth, and urban development. All of these are potential areas for outreach of MSD.

**Recommendation 23**

Simply and clarify language wherever possible and reduce jargon, in order to reduce a perceived barrier to accessibility not only among practitioners, but also among officials and advisors.

### 3.4 Effectiveness

Direct evidence of BEAM's influence on MSD project level outcomes is limited due to the scale and scope of this Review. However, several practitioners commented on the positive contribution of MSD/M4P, including BEAM, towards achieving project level outcomes and impacts over time. For example, the adoption of MSD principles by some Swiss NGOs means that they are turning their focus from implementation to facilitation, i.e. away from treating symptoms towards addressing underlying problems. At the level of the individual practitioner, it is clear that the variety of ways in which professionals can access and engage with MSD material through BEAM and other platforms supports personal learning and development as well as supporting a transition in approach at the organisational level. The operational guide was specifically identified on a number of occasions as a valuable resource that teams use as induction material for new members of staff.

#### 3.4.1 Professionals (Outcome Indicator 1)

Implementers reported that BEAM met a need for them in providing some insights into problems that they faced on a daily basis. Senior professionals reported using BEAM as a source of information for guiding and mentoring junior colleagues. BEAM was regarded by respondents as a "higher authority". BEAM clearly has a certain level of influence, which carries with it a corresponding level of responsibility for quality assurance of both the resources BEAM houses and of the approaches and evidence BEAM promotes (see recommendation 8 above).



Suggestions for improvement from implementers included a need for increased practicality and more direction in knowledge products with less emphasis on academic thinking. In addition, some concern was expressed amongst implementers that training materials tend to focus on academic thinking rather than on practical steps to take in the field (see above recommendation 13).

### 3.4.2 Organisations (Outcome Indicator 2)

All KII respondents expressed a need for BEAM to more actively engage with donors and for donors to play a more active role in the ongoing debate and development of the discipline. It was felt donor staff need to be better briefed on MSD and its emergent trends, to marry the bureaucratic rigour of the log frame results to the adaptive, flexible nature of MSD. BEAM is already actively used as a resource for donor staff to gain exposure to MSD thinking, but there is a need for BEAM to provide more donor specific information and resources. This may then serve as an additional tool to work with donors that currently do not actively or regularly engage with MSD.

Some suggestions made by respondents as to donor specific content included guidance on drafting MSD related Terms of Reference and guidance on working with an MSD programme. Specific issues raised were how to identify and promote success factors such as recruiting and retaining effective teams within projects. A donor section could include basic signposting to other BEAM resources, but from a donor's perspective e.g. VfM evidence. The development of a donor's section could encourage donor staff to participate actively in exchanging views or participating in webinars.

#### **Recommendation 24**

Develop and populate a donor / commissioner section for the BEAM website.

Respondents reported that there were no facilities or mechanisms to transfer knowledge and learning between programmes, with one respondent reporting "institutional amnesia as opposed to institutional memory", and that commercial incentives from consultancies precluded this from being implemented.

#### **Recommendation 25**

Recognising the challenges of encouraging programmes to share in their learned lessons, explore mechanisms for recording of learned lessons, including failures, to facilitate sector and institutional growth and momentum.

### 3.4.3 Non-traditional Fields (Outcome Indicator 3)

BEAM has innovated around the expansion of MSD into non-traditional fields including provision of basic services such as health, energy, education and the development of urban markets. This has proved to be a growing area of potential influence. Some non-traditional fields might be easier to access than others and might allow for early wins. It should be noted that BEAM were asked to de-prioritise work around non-traditional fields in the 2015 Annual Review, however, this guidance could be reviewed.



#### **Recommendation 26**

Continue to work in non-traditional areas for MSD and allow for innovations to cross-pollinate into the more traditional MSD sectors.

### **3.4.4 Connectedness (Outcome Indicator 4)**

There is demand from practitioners for guidance to be delivered in small, focussed, interactive groups, ideally drawing on expertise from other experienced practitioners. In the context of pro-active outreach, Agri-links webinars were mentioned by KII respondents as a good model. This involves directly contacting key individuals by email e.g. through donor contacts on projects, to alert them to upcoming events such as a webinar. The webinar is then provided as both a face-to-face seminar as well as an online resource.

#### **Recommendation 27**

Organise more periodic discussion groups/mediated webinars on focussed topics (e.g. MSD's application to impact investment, health, value-added sectors, urban development).

## **3.5 Sustainability**

BEAM has adopted an operational approach that emulates its MSD message – to facilitate rather than provide, with a view to developing a responsive market system for skills development, policy formulation, research and evidence. To this end, one KII respondent mentioned four indicators of success; that commissioners' policies are reflecting MSD principles, that research and information are flowing freely between academics and practitioners, that designers and implementers are investing in skills development and that the media are promoting MSD messages. As with any MSD programme; it will take considerable time for the market to evolve to the extent that sustainability is achieved.

### **3.5.1 Donor funding**

BEAM is not yet a commercially viable enterprise. Its sustainability is dependent upon ongoing donor support and will be strengthened if this donor base is widened. To quote one MSD implementer: *"We probably need to practise what we preach and get beyond donor reliance from project to project in terms of where our information or knowledge is coming from."*

The balance of feeling from KII respondents is that the field of MSD has benefitted greatly from a step-up in funding from the previous M4P Hub in recognition that most of BEAM's activities could not be self-funded. Over time, perhaps a BEAM-type service would evolve in the market place, but this is unlikely given the effort required to initiate dialogue and to facilitate in the way that BEAM has done.

It should be noted that USAID chose not to broaden its funding base for LEO Microlinks on the basis that multi-donor collaboration in itself takes significant human resources to bring about and is often reserved for large initiatives. On the other hand, a narrow funding base inevitably carries higher risk since a major funder could withdraw – perhaps due to changes at a political/government level or at the level of key influencers within a funding organisation.



**Recommendation 28**

Widen the funding base of BEAM to include new donors and foundations and include fresh sources of contributory funding to complement core funding, being aware of the increased (internal) HR cost.

Respondents noted that feedback on the extent to which BEAM is valued by its audience could enable donors to attract new funders to BEAM, and could enable BEAM and its funders to prioritise resources; shifting funding out of perceived low-value outputs into more highly valued outputs.

**3.5.2 Influencing through intermediaries**

True to a market systems approach, BEAM would not be a player in the market place and its facilitative role would result in self-generated momentum by other actors after the BEAM programme draws to a close. The trade-off in taking a market systems approach is the potential for loss of some control and focus, balanced against potential gains in greater sustainability in the longer term and much further reach and influence.

Examples of using intermediaries to increase influence and momentum could include shaping the research agendas of universities/research institutes; working through emerging networks such as ASOCAM or the Nepal market forum; boosting networks that share information on capacity-building/training/mentoring, and using in-country networks to reach practitioners who might participate in regional workshops.

Some KII respondents expressed concern about the potential dominance of commercial players under a “user pays” principle, citing sponsorship at the BEAM conference in Lusaka as an example.

**Recommendation 29**

Seek and extend opportunities to work through intermediaries to further BEAM’s objectives in all work areas.

**Recommendation 30**

Deepen and extend the existing list of MSD advocates or ‘champions’. In time, this would help deepen the awareness of MSD among BEAM donor departments, and could broaden BEAM’s remit from MSD, with a poverty-reduction agenda, into other areas such as basic services.

**Recommendation 31**

Continue to be aware of the potential risks of commercially motivated contributors.

**3.5.3 Willingness to Pay**

The popularity of BEAM’s annual conference, which does take payment from delegates, offers a very positive indication of the perceived value of BEAM’s services. There was widespread goodwill from KII respondents in terms of willingness to pay for BEAM’s wider



services, but the practicalities of this were also queried. Outreach might drop if individuals are expected to pay. Some organisations and individuals may have the will to pay but lack the means (a credit card). BEAM's website would also have to be constituted to be able to receive subscriptions. One respondent's suggestion was to trial a 'Wikipedia-style' approach that seeks voluntary contributions to cover inevitable costs of providing a valued service.

Many contributions to the BEAM Exchange are already made in the valuable currency of time rather than cash. It was noted by respondents that what you get out of an exchange, as the name suggests, is proportionate to what participants are prepared to put in, which includes their own time.

**Recommendation 32**

Continue to develop and maintain an internal management model to determine true cost of BEAM, reflecting "in-kind" contributions.

### 3.6 Operational Efficiency

BEAM and its staff are held in very high regard for their energy and efficiency. Positive commentary from KII respondents included reference to the high quality of the BEAM annual conference and the effort made to reach out to and engage a broad community. BEAM gathered its own real-time constructive feedback on the 2016 BEAM conference in Lusaka. Credit was also given by respondents to the way in which the BEAM website has been developed, overcoming initial difficulties with web consultants. Respondents widely noted how difficult it is to initiate and sustain online discussion fora, and how BEAM's facilitation approach has been effective.

Overall, at an operational level, the feedback received for this review has been highly positive and does credit to the BEAM team. There was very widespread positive comment regarding the BEAM team's efficient running of the 2016 BEAM conference and the responsiveness of the team generally in managing BEAM. Most respondents were unable to comment in detail about internal operational efficiency since they had no sight of this aspect of the programme.

Depending on the path(s) the programme opts to take in the future, BEAM will need to re-examine its own capacity in terms of both existing personnel and existing institutional arrangements to leverage the maximum benefit for BEAM. The mix of full-time and part-time BEAM staffing allows specific expertise to be brought together. Respondents questioned whether the current project-based BEAM structure was the most appropriate model to expand and drive forward the MSD agenda. It was felt that BEAM would benefit from more formal governance and greater operational engagement of both BEAM's Strategy Advisory Panel (SAP) (or possibly a Board in future) and donors (possibly represented on the Board). BEAM's lack of permanent physical space is perhaps sub-optimal at times but not uncommon for international team working.

**Recommendation 33**

Consider ways by which expert input from the SAP could be gathered sufficiently early to guide BEAM's workplan beyond 2017, whilst retaining the Executive's operational flexibility that has worked well to date. This could involve a more formal Board.



A number of respondents expressed concern about the capacity of the current BEAM staff complement to achieve the expectations of the MSD community. Recognising that the diversity of the BEAM team has had a positive influence on BEAM, concerns included the role of part time staff who had commercial interests elsewhere in the field, and the lack of leveraging of existing institutional relationships, highlighted earlier in this report. Similarly, concerns were expressed from an institution's viewpoint regarding the release of confidential corporate information to BEAM, given its managerial ties to a potential competitor.

**Recommendation 34**

Any future changes to BEAM's HR structure should be made with careful regard to the perceived independence and neutrality of team members in the eyes of BEAM's users.

### 3.7 BEAM's Theory of Change

The BEAM Theory of Change (TOC) is composed of six interlinked processes; actions/activities, outputs, uptake, systemic change, outcomes and impact. A recent review of the TOC grouped actions and activities into nine separate work streams. It is too early in the process (and beyond the scope of this review) to determine the extent of impact or even the achievement of outcomes of BEAM's activities in the last period. Instead, the TOR for this review requested that the review pay particular attention to the assumptions within the TOC and the extent to which these have held true, in particular those that focus on the engagement of MSD practitioners with BEAM.

A number of assumptions are made in the BEAM TOC with regard to BEAM activities/workstreams; that BEAM would be able to determine MSD community needs, interpret these into "learning agendas", and meet the needs through appropriate tools and methods.

As discussed above, BEAM has gone some way in identifying the needs of the MSD community, but has perhaps underestimated the diversity of the community and the respective needs of the sub-groups. While BEAM may have been able to develop some of these needs into learning opportunities, as outlined above, there are still some questions about the appropriateness of the tools and methods used to engage with the various sub-groups within the learning community.

The assumptions underpinning the outputs and their subsequent uptake focus on players within the community, external to BEAM, including donors, user groups and organisations. While implementing organisations have shown a willingness to allow staff to engage with BEAM, technical restrictions (e.g. access to the internet, time to sit at your desk versus being out in the field) have played a role in limiting the participation of implementing organisations working in the field.

Influencers have engaged with BEAM regarding the development of the discipline, but some respondents expressed concern about their level of contribution, reporting that they felt that certain organisations dominated the debate.

Some respondents across all the groups also expressed some concern about the credibility of evidence provided by BEAM, suggesting that there was a need for greater engagement of BEAM to synthesise and quality assure not just knowledge (output 1) but also evidence (output 4).



TOC assumptions at the level of systemic change were beyond the scope of this review owing to the long-term nature of systemic change.

The overall logic of the TOC makes sense, if the reader is aware of the intricacies and operations of BEAM. An outside observer without this knowledge, may question the order of some of the steps, which might be displayed differently. For example currently systemic change is placed before outcomes while it perhaps might best be reflected as a reiterative process. A common problem of TOCs is trying to compress complex and complicated processes into diagrams that often belie the underlying complexity.

BEAM may consider unpacking their current TOC into a more detailed (and conceivably less visually appealing) document (perhaps for internal use). This would allow BEAM to explore and detail assumptions, influences and mechanisms in a manner that is not possible in the current model. There are several advantages of exploring this level of detail, including the opportunities to identify the needs of specific audience groups, the mechanisms that BEAM hopes to influence to meet these needs, and the outcomes specific to these actions.



## 4 Dichotomies

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The challenges of valuing BEAM's outputs were recognised by many KII respondents. A number of dichotomies emerged during the interviews, which help define the value BEAM users place on different aspects of BEAM's output. These are not necessarily mutually exclusive, binary options but rather represent the wide range of views of the BEAM community. These dichotomies are presented for BEAM to consider as indications of the wide range of opinions, capabilities and even interests within their audience and to be aware that pursuing a single course of action may expose the programme to risks and criticism, which will need mitigation measures.

The dichotomies are summarised as follows:

### 4.1 Complexity versus Simplicity

The needs of the BEAM audience demand simplicity (of language, jargon and definitions); primarily for implementers and commissioners who are relatively new to the market systems approach.

*"There are plenty academics out there who can explain market systems in incredibly complex ways that make it very hard for a practitioner to understand what they're supposed to be doing practically. BEAM is very good at putting in all in plain language".*

On the other hand, influencers and designers within the BEAM audience are more likely to value the complexity and depth of peer-to-peer discussion and debate that BEAM offers, and feel a more academically inclined discourse is needed to promote and develop the discipline.

There is clearly value put on practical tools, how-to notes, case studies and M4P guidance, however there is clearly also a call for BEAM to provide intellectual added-value in terms of advancing the market systems approach and strengthening its appeal among academics, policy makers, donors, senior development professionals and thought leaders.

*"If you want to advocate for the systemic approach, BEAM should be more visible and more creative rather than being in this circular echo-chamber."*

### 4.2 Facilitative versus Directive

Feedback from the review suggests that BEAM should be leading the MSD field, using a directive approach, by breaking new ground as well as offering clear guidelines on lessons learned over the last decade or longer. One respondent noted with reference to BEAM's current role; *"It's not shaping, it's not leading, it's not advocating. It's simply this neutrality space."*

Taking a more directive role could require a stronger mandate from BEAM's donors to advocate and innovate on their behalf. It is important to note that pursuing this course may expose the programme to risks and criticism, which will need mitigation measures.

On the other hand, one respondent stated that; *"Collecting relevant evidence is more valuable than trying to be an advocate"*.

The 'facilitative vs directive' debate lies mostly among thought leaders / influencers, and requires further engagement from donors to advance.



### 4.3 Oral versus Written Knowledge Products

There is a tendency for purveyors of information to identify and promote a means of communication that they themselves find most effective. However, in many cases this might alienate large percentages of the target beneficiaries. In BEAM's case there tends to be a preference for the written word, supplemented by recorded webinars.

Some KII respondents have suggested that there is a need for information to be transmitted using other means.

*"I think face-to-face meetings like the BEAM conference [are] very effective. I find webinars less effective. I find blogs completely ineffective."*

*"Africans tend to belong to an oral culture. [But] many of the things that are online are for people sitting in their offices, not people who are in the field who have only a small window to engage. Being interactive, even by webinar, allows people to react and respond."*

Some respondents have suggested that BEAM knowledge products should include contributions from authors whose experience reflects the reality of implementation.

*"I tend to find resources are written by westerners for westerners and so when I see a resource that's at least co-authored by a national of a programme ... [I pay] much more attention to that resource."*

### 4.4 Accumulation of Knowledge versus Synthesis of Evidence

To achieve its goal of being a facility for knowledge exchange and learning, BEAM has become a repository of information. This has led to some commentary and criticism and a call to make better use of this knowledge base. Various suggestions have been made to *inter alia* distil the information, to synthesise learnings and to compare and contrast programme approaches.

*"Evidence collecting is over-done. Evidence needs to turn into something."*

Looking ahead, on balance, there was more call for practical guidance, synthesis of evidence and extraction of nuggets of good practice than there was for further accumulation of evidence, valued as the latter clearly is among the BEAM community. It is recognised that the process of refinement and extraction, of drawing lessons from information carries with it an additional burden of quality assurance. As in section 4.2, above, it is also important to note that pursuing this course may expose the programme to risks and criticism, which will need mitigation measures.

### 4.5 Operational Focus versus Policy Focus

BEAM was argued by KII respondents to be in a unique position to drive the development of the MSD approach as an operational process, an academic area of research and as a policy approach, but to achieve this it is suggested BEAM needs to a thought leader; *"above the average, reasonable person's understanding and knowledge."*

Commentary from the BEAM 2016 conference in Lusaka and from informed sources, particularly donors, points to the need for greater clarity about where the MSD approach sits in relation to a wider economic, development or industrial policy. Evidence of effectiveness and value for money have an important role to play in widening the appeal and uptake of MSD, but would be strengthened significantly if the rationale and definition of the approach were clearer.



*“Having a pool of funding to explore interesting and emerging questions adds a lot of value.”*

At the same time, practitioners are looking for answers to operational problems that they face on a daily basis, and are expecting BEAM to assist in providing these solutions. A key example of such an issue, and a recurrent theme among practitioners, related to how to build and motivate a successful team.

*“I would love a situation where BEAM becomes the first programme in M4P space that develops [programmes] focussing on very specific things that we [struggle with]”.*

Based on evidence from the BEAM user community, it is clear that there is a strong demand for BEAM to have both an operational and policy focus. BEAM needs to achieve a balance between these two areas of focus in order to meet the varied needs of its audience.

#### **4.6 Broad Church versus Enlightened Priesthood**

The phrase “a broad church” was encountered frequently during this review, and relates both to the audience of BEAM as well as to the approach BEAM adopts to engage with these groups. The question is whether BEAM should cater for the broad church or the enlightened priesthood? A related question arising from the review is the extent to which BEAM should turn its focus from the ‘converted’ to the ‘non-converted’?

The evidence from this review is clearly that both are valued and important to continue. On balance, the demand for a broadening of appeal would merit the larger share of BEAM’s resources in future.



## 5 Extension Scenarios

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### 5.1 Low, Medium and High Funding Scenarios

Among KII respondents, there is a clear mandate for the continuing existence of BEAM and wide recognition that it has been well-resourced (especially in relation to its predecessor M4P Hub), which is reflected in its achievements to date and demand for an ongoing work programme from BEAM's audience. Suggestions for change by the respondents were mostly made without detailed recourse to budgetary considerations, and were couched more in terms of rebalancing effort.

The Low, Medium and High scenarios offered in this section are an attempt to place the recommendations within a funding context.

Recommendations mostly relate to new activities or a change in emphasis. However, the **Low Scenario** would entail scaling back certain activities within a more restrictive funding envelope. These could include certain activities within Output 3 around enabling a community of practice, focussing instead on signposting to existing PSD and MSD fora. With lower funding, BEAM could also consider reducing effort on generating and synthesising MSD evidence and concentrate on prioritising, signposting and codifying. In time, if successful in raising more funding, BEAM would transition to the Central Scenario

The **Central Scenario** is more or less a continuation of the current delivery model, with a few additions based on the priorities emerging from consultations. Under this scenario, it is assumed that funding continues near or at a current rate of expenditure, possibly with a wider funding base and altered mix of core and contributory funding to allow for adaptive programming.

Two quotes from MSD practitioners illustrate the backdrop for the Central Scenario:

From a market systems practitioner and designer, *"I'd like more of the same, for a start. We haven't finished yet"*, and from another market systems practitioner, *"The platform has been highly effective and responsive to current trends and what practitioners are asking for. So keep doing a good job I guess."*

The **High Scenario** offers feedback on fresh areas of effort that could require additional resource over time and is therefore more aspirational, but based on interest and demand expressed by KII respondents throughout the review. Under this scenario, it is assumed that BEAM is highly successful in attracting funding from Year 4 and this allows fresh activities over and above the Central Scenario.

### 5.2 Priority Recommendations

In addition to placing each of the recommendations within one of the three scenarios, high-priority recommendations (irrespective of funding scenario) are shown in bold.



Recommendations	SCENARIO		
	LOW	CENTRAL	HIGH
<b>Recommendation 1* - Continue to build on strong brand awareness and maintain a strong market systems focus, which is central to BEAM's unique selling point (USP).</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 2 - Examine the implications of LEO's funding ending in September 2016, and explore opportunities for BEAM to make good any loss of momentum in promoting market systems development. Examine the possibility of curating existing LEO resources.			<input checked="" type="checkbox"/>
Recommendation 3 - Clearly promote BEAM's unique range and depth of functions, specifically emphasising its role as an exchange among active participants.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 4 - Maintain a focussed dialogue with DCED to ensure that overlap is minimised, opportunities for positive linkages are fostered and the uniqueness of both platforms is communicated to users.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 5 - Build on the strengths of BEAM's institutional partners to capitalise fully on their contribution to BEAM's activities and outputs.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Recommendation 6* - Segment BEAM products and services according to (anticipated) audience-specific needs. Distil and provide evidence in a variety of formats for a variety of purposes and for different user groups.</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 7 - Facilitate the collection and distillation of needs within the MSD environment then relay and engage with the donor community on processes to meet these needs.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 8 - Publicise the BEAM QA procedure for information sources included on BEAM's website (including BEAM's own commissioned and researched pieces, as well as the material BEAM curates). Ensure that this procedure, while of a high standard, is accessible and implementable to the wide range of BEAM users and potential contributors to encourage ongoing programme level contribution.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 9 - Examine the possibility of using a peer review mechanism, especially to QA knowledge products included on BEAM's website.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 10 - Develop communication channels that meet the needs of a wider range of users including the use of video and audio.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Recommendation 11* - Increase the amount of practical, project-based information on the BEAM website.</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 12 - Continue to refine the website to improve its usability and dynamic functionality including through suggesting additional resources, based on the user's history.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 13 - Facilitate the development of skills courses that are short, utilise appropriate pedagogical methodologies that reflect the diversity of needs within the MSD audience (especially amongst programme staff), and are focused on the most common problems faced by field practitioners (e.g. team recruitment and development).			<input checked="" type="checkbox"/>
Recommendation 14 - In partnership with an established educational institution, explore the possibility of running a MSD Massive Open Online Course (MOOC).			<input checked="" type="checkbox"/>
Recommendation 15 - Facilitate and support regionally based communities of practice which focus on building regional capacity, using regional expertise and discussing regional concerns and problems.			<input checked="" type="checkbox"/>
Recommendation 16 - Establish competency based communities of practice where individuals with the same areas of interest and responsibility can engage directly with one another.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 17 - Explore the possibility of facilitating mentoring relationships between experienced and developing staff or peer-to-peer support relationships (especially in the same region) using a platform such as mentorcloud.			<input checked="" type="checkbox"/>



<b>Recommendation 18* - Synthesize the findings of MSD related programme research to determine what has worked (and not worked) effectively, and compare these results against other non-MSD programmes.</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 19 - Facilitate academic engagement with BEAM to develop the MSD discipline and to engage critically with existing evidence to bolster the credibility of the market systems approach.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 20 - Ensure that future thematic areas reflect the needs of the community members and if necessary develop separate thematic areas that reflect different needs of different community sub-groups.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 21 - Encourage reporting on examples of innovation and its application within programmes (even failures) to stimulate greater learning opportunities.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Recommendation 22* - Develop a clear definition of MSD. There could be a 'core' definition and 'wider relevance' definition. These definitions would allow the discipline to develop alongside so-called 'non-traditional' fields and wider PSD approaches, which could include health, education, youth, and urban development. All of these are potential areas for outreach of MSD.</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 23 - Simply and clarify language wherever possible and reduce jargon, in order to reduce a perceived barrier to accessibility not only among practitioners, but also among officials and advisors.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 24 - Develop and populate a donor / commissioner section for the BEAM website.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 25 - Recognising the challenges of encouraging programmes to share in their learned lessons, explore mechanisms for recording of learned lessons, including failures, to facilitate sector and institutional growth and momentum.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 26 - Continue to work in non-traditional areas for MSD and allow for innovations to cross-pollinate into the more traditional MSD sectors.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 27 - Organise more periodic discussion groups/mediated webinars on focussed topics (e.g. MSD's application to impact investment, health, value-added sectors, urban development).			<input checked="" type="checkbox"/>
<b>Recommendation 28* - Widen the funding base of BEAM to include new donors and foundations and include fresh sources of contributory funding to complement core funding, being aware of the increased (internal) HR cost.</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Recommendation 29* - Seek and extend opportunities to work through intermediaries to further BEAM's objectives in all work areas.</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 30 - Deepen and extend the existing list of MSD advocates or 'champions'. In time, this would help deepen the awareness of MSD among BEAM donor departments, and could broaden BEAM's remit from MSD, with a poverty-reduction agenda, into other areas such as basic services.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 31 - Continue to be aware of the potential risks of commercially motivated contributors.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 32 - Continue to develop and maintain an internal management model to determine true cost of BEAM, reflecting "in-kind" contributions.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Recommendation 33* - Consider ways by which expert input from the SAP could be gathered sufficiently early to guide BEAM's workplan beyond 2017, whilst retaining the Executive's operational flexibility that has worked well to date. This could involve a more formal Board.</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendation 34 - Any future changes to BEAM's HR structure should be made with careful regard to the perceived independence and neutrality of team members in the eyes of BEAM's users.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



## 6 Appendices

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### 6.1 Terms of Reference

#### **Terms of Reference: External Review of Building Effective and Accessible Markets (BEAM) Programme**

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##### **1. Background and context**

DFID require an external review of the Building Effective and Accessible Markets (BEAM) programme to consider progress in depth two years in, and to inform whether any changes in direction or approach might be needed. The review will also help both donors, DFID and SDC, to assess what should happen to BEAM at the end of the programme's contract (31 March 2017).

The BEAM Exchange (or 'BEAM') is a facility for knowledge exchange and learning about the role of market systems approaches in reducing poverty. DFID and SDC have a large portfolio of programmes that include aspects of market system development and therefore have a strong interest in improving the efficiency and impact of these approaches. This external review is aimed at helping BEAM to better support the development community by strengthening and extending the application of market systems approaches, through supporting the spread of good practice and facilitating the sharing of lessons and experience.

To do this, BEAM has been tasked with building a vibrant community among policy advisors, consultants, practitioners and businesses, to support those who design, manage, implement and evaluate market systems programmes. The main vehicle for BEAM's activities has been the programme website ([www.beamexchange.org](http://www.beamexchange.org)), and sitting behind this is a structured research and learning programme supported by a range of practitioner exchange events.

To date, four strategic priorities for the programme have been: knowledge management (accessible infrastructure and core guidance), systematic support for peer-learning (events, spaces and networks), formalising skills development (training and capacity building), and building credibility (garnering and using evidence).

##### **2. Objectives of the review**

The external review will examine the achievements of BEAM to date and independently validate any internal assessments. Specific requirements are to:

- Assess progress against the objectives set out in the agreed log frame. This will involve examining if the inputs have been provided as planned and whether BEAM is on the anticipated path to deliver the planned outputs, outcome and impact.
- Evaluate the validity of the assumptions in the theory of change underlying BEAM. This will include a particular focus on if, and how, market systems practitioners are engaging with the programme.
- Recommend revisions to the programme design and implementation to maximise effectiveness and impact, to ensure it continues to meet its intended objectives and adapts as necessary.
- Identify priorities in the programme's current work, with relation to considerations of sustainable exit for donors.
- Review the programme's plans for potential extension options (e.g. 'minimum' and 'maximum' options), should further funding be secured.



### 3. Scope

The review will assess the progress of the programme against the outcome and outputs set out in the business case approved in January 2013, with reference to the logframe dated February 2015 and theory of change dated June 2014. It will also test the logframe itself.

The review will be conducted between April and mid-June 2016, using the latest available information to represent the programme. It is expected that the review team will visit Lusaka during BEAM's conference (19-20<sup>th</sup> May), in order to meet in person with market systems practitioners to assess their engagement with and views on the programme.

Key questions to be answered are set out below in the DAC format.<sup>2</sup> These may be adapted in consultation with the DFID SRO to ensure applicability to the nature of the programme.

#### A. Relevance

*The extent to which the aid activity is suited to the priorities and policies of the target group, recipients and donors.*

- To what extent are the objectives of BEAM still valid?
- Are the activities and outputs of BEAM consistent with the overall goal and the attainment of its objectives?
- Are the activities and outputs of BEAM consistent with the intended impacts and effects?

#### B. Effectiveness

*A measure of the extent to which an aid activity attains its objectives.*

- To what extent are the objectives likely to be achieved?
- What are the major factors influencing the achievement or non-achievement of the objectives?
- To what extent is each of BEAM's areas of activity providing value for money (including recommendations for reallocation of effort if necessary)?

#### C. Efficiency

*Efficiency measures the outputs relative to the inputs. It is the extent to which the costs of the aid activity can be justified by its results, taking alternatives into account.*

- Are objectives being achieved on time and at least cost?
- Has BEAM been implemented in the most efficient way compared to alternatives?

#### D. Impact

*The positive and negative changes produced by a development intervention, directly, or indirectly, intended or unintended. This involves the main impacts and effects resulting from the activity on the local social, economic, environmental and other development indicators.*

- What has happened as a result of BEAM?
- What real difference has BEAM made to the intended beneficiaries?
- How many people have been affected?

#### E. Sustainability

*Sustainability is concerned with measuring whether the benefits of an activity are likely to continue after donor funding has been withdrawn.*

- To what extent are the benefits of BEAM likely to continue after donor funding ceased?
- What are the major factors influencing the achievement or non-achievement of sustainability?

### 4. Methodology

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<sup>2</sup> See: <http://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>



The review team will interview key staff in DFID, SDC and BEAM, as well as practitioners involved in the design, implementation, management or evaluation of market systems programmes in donors, NGOs and the private sector. The methodology will involve systematically gathering feedback from people who are, or could be, actively involved in this community of learning. The reviewers will consult with BEAM and the DFID SRO to agree a representative sample of users of the BEAM exchange, and to coordinate with BEAM's own ongoing evaluation activities.

Particular focus will need to be given to the views of practitioners using market systems approaches in DFID and SDC priority countries. A minimum of 25 market practitioners or BEAM users should be included. Some of these interviews and/or workshops can be conducted remotely, but it is expected that some will be completed in person. Interviews should be undertaken in the most cost-efficient manner, which may include using the BEAM conference in Lusaka (19-20<sup>th</sup> May). Any such plans to use this event should be set out in the proposal and later agreed with the BEAM team, and any costs incurred event (e.g. entry, travel costs, rent of a side room) will need to be covered by the review team.

In addition to the above, a suite of operational documents and data will be reviewed to provide a well-rounded assessment of programme performance. A detailed, although not exhaustive, list is provided at the end of this document. The review team will engage closely with BEAM's research and evaluation experts, to capture and assure their ongoing assessment of impact and performance.

## **5. Output**

The main output will be a review document, completed using a standard template, to be agreed in advance, and providing answers to the questions above along with clear recommendations for the future direction of the programme. The report will be published and is expected to be a maximum of 20 pages, with a concise executive summary and supported by annexes as required.

## **6. Timeframe**

The review will begin in April or May 2016, with a final report submitted before the end of June. A draft will be completed at least a week in advance, to give DFID, SDC and BEAM a chance to comment. Payment milestones will be negotiated with the successful team, and are likely to be on completion of: research methodology/plan; overseas visit to BEAM conference in Lusaka; and the final paper including response to comments.

## **7. Team composition**

The review requires a 1-2 person team that is well informed about market systems, or M4P, approaches including a familiarity with the range of organisations and practitioners operating in this field. Specifically, capacity and expertise in the following areas is preferred:

- Market systems: knowledge and/or practical experience of designing and implementing market systems programmes.
- Evaluation: knowledge of a full range of evaluation methods including assessment of log frames and theories of change, and qualitative techniques including interviews.
- Communities of practice: familiarity with the set-up and operation of active communities of practice, including knowledge management across a variety of mediums such as web facilitation.

It is estimated that 25-30 days input will be needed including travel time.

## **8. Duty of care**

The Supplier is responsible for the safety and well-being of their Personnel and Third Parties affected by their activities under this contract, including appropriate security arrangements. They will also be responsible for the provision of suitable security arrangements for their domestic and



business property. The supplier will need to confirm that they fully accept their Duty of Care responsibilities and demonstrate that they have the knowledge, experience and resources to effectively manage them.

### **9. Background documents and contacts**

Then main DFID contact will be Robbie Barkell (SRO for BEAM), and the main BEAM contact will be Mike Albu. A list of potential interviewees will be compiled for the review team. Programme documents for review include:

1. Business case
2. BEAM contract incl. budget
3. Inception report
4. Log frame (March 2015)
5. Theory of Change (June 2014)
6. Annual Review 2015 (June 2015)
7. Quarterly deliverable reports (various)
8. M&E data
9. Website and event analytics
10. BEAM risk register
11. BEAM research plans and reports (various)
12. BEAM think pieces (various)
13. BEAM event write-ups, including blogs
14. BEAM website, including evidence map and guidance sections
15. Records of Management Oversight Committee and Strategic Advisory Board meetings

Robbie Barkell  
Investment Climate Team, GRD, DFID



## 6.2 List of Key Informant Interview (KII) Respondents

The following provides a list of the organisations that the review team conducted KIIs with. Multiple KIIs were conducted with some of the organisations, with different members of the organisation. 39 KIIs were conducted in total.

- Adam Smith International
- BEAM Exchange
- DAI
- DFID
- Ghana Market Development Programme (MADE)
- HELVETAS Swiss Intercooperation
- Impact LLC
- International Labour Organisation
- Itad
- Market Development Facility
- MarketShare Associates
- MarketShare Associates / SEEP
- Mercy Corps (TOPS Programme)
- Palladium
- Pollen Group
- Private Sector Innovation Programme for Health (PSP4H)
- Propcom Maikarfi
- PwC (BEAM)
- Springfield Centre
- Swiss Agency for Development and Cooperation
- Swiss Agency for Development and Cooperation, Bangladesh
- Swiss Agency for Development and Cooperation, Nicaragua
- Swisscontact
- The Springfield Centre
- Traidcraft Exchange
- USAID
- Gatsby Foundation



### 6.3 Documents Consulted

The following documents were consulted by the review team as part of the external review of the BEAM programme:

- BEAM TOC 2014
- BEAM logframe
- BEAM Theory of Change (TOC) Year 3 Update
- Selected BEAM Management Oversight Committee (MOC) Minutes
- Selected BEAM Quarterly Reports
- Selected BEAM Strategic Advisory Panel (SAP) minutes
- BEAM Consultation Report 2014
- BEAM Exchange Inception Report 2014
- BEAM Exchange Strategic Priorities 2016-17
- BEAM Conference Feedback document (June 2016)
- BEAM Log of Feedback Jan-May 2016
- Market Systems Development Platform Business Case (2013)
- BEAM Annual Review 2015