إقـــــرار

أنا الموقع أدناه مقدم الرسالة التي تحمل العنوان:

The Contribution of WFP Voucher Programme to the Development of Participating Local Food Producers in Gaza Strip

أقر بأن ما اشتملت عليه هذه الرسالة إنما هو نتاج جهدي الخاص، باستثناء ما تمت الإشارة إليه حيثما ورد، وإن هذه الرسالة ككل أو أي جزء منها لم يقدم من قبل لنيل درجة أو لقب علمي أو بحثي لدى أي مؤسسة تعليمية أو بحثية أخرى.

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The work provided in this thesis, unless otherwise referenced, is the researcher's own work, and has not been submitted elsewhere for any other degree or qualification

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The Contribution of WFP Voucher Programme to the Development of Participating Local Food Producers in Gaza Strip

مدى مساهمة برنامج القسائم الشرائية التابع لبرنامج الأغذية العالمي في تطوير الصناعات الغذائية المحلية المشاركة في قطاع غزة

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نتيجة الحكم على أطروحة ماجستير

بناءً على موافقة شئون البحث العلمي والدراسات العليا بالجامعة الإسلامية بغزة على تشكيل لجنة الحكم على أطروحة الباحث/ **محمد عبدالرحيم محمد المدهون** لنيل درجة الماجستير في **كلية *التجارة*/ قسم إدارة الأعمال** وموضوعها:

مدى مساهمة برنامج القسائم الشرائية التابع لبرنامج الأغذية العالمي في تطوير الصناعات الغذائية المحلية المشاركة في قطاع غزة

The Contribution of WFP Voucher Programme to the Development of Participating Local Food Procedures in Gaza Strip

وبعد المناقشة العلنية التي تمت اليوم السبت 26 ذو الحجة 1436هـ، الموافق 2015/10/10م الساعة الواحدة ظهراً بمبنى طيبة، اجتمعت لجنة الحكم على الأطروحة والمكونة من:

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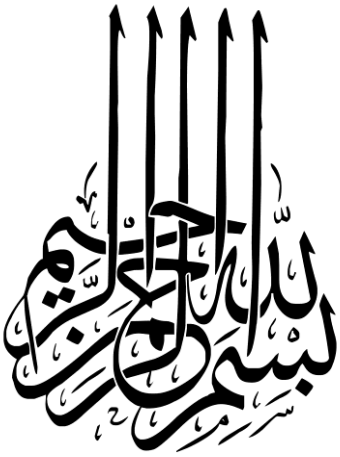
وبعد المداولة أوصت اللجنة بمنح الباحث درجة الماجستير في **كلية *التجارة*/ قسم إدارة الأعمال**.

واللجنة إذ تمنحه هذه الدرجة فإنها توصيه بتقوى الله ولزوم طاعته وأن يسخر علمه في خدمة دينه ووطنه.

والله ولي التوفيق ،،،

نائب الرئيس لشئون البحث العلمي والدراسات العليا

أ.د. عبدالرؤوف علي المناعمة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وقل رب زدني علما

إلى روح أبي

To The Memory of My Father

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LIST OF ABBREVIATIONS

ADESO	African Development Solutions (*formerly Horn Relief*)
CBOs	Community Based Organizations
CP	Cooperating Partner
CT	Cash Transfer
FAO	Food and Agriculture Organization of the United Nations
FCS	Food Consumption Score
FGD	Focus Group Discussion
GDP	Gross Domestic Product
GS	Gaza Strip
HHs	Households
ILS	Israeli Shekel
MOA	Ministry of Agriculture
MONE	Ministry of National Economy
MOPIC	Ministry of Planning and International Cooperation
MOSA	Ministry of Social Affairs
NGO	Non-Governmental Organization
OCHA	UN Office for the Coordination of Humanitarian Affairs
ODI	Overseas Development Institute
oPt	occupied Palestinian territory
Oxfam GB	Oxfam Great Britain
PCBS	Palestinian Central Bureau of Statistics
PNA	Palestinian National Authority
SWOT	Strengths – Weaknesses – Opportunities – Threats
UNCTAD	United Nations Conference on Trade and Development
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development
VP	Voucher Programme
WB	West Bank
WFP	World Food Programme of the United Nations
WHFL	Wheat Flour

ABSTRACT

This study tries to assess the contribution of the WFP Voucher Programme to the development of local food producers, whose products are being purchased by beneficiaries of the Voucher Programme in the Gaza Strip, in the four fields of quality, production, human resources management and marketing performance. The study used the analytical descriptive approach to analyze the data collected through interviewed questionnaire distributed among the whole study population of 25 local food producers and through one focus group discussion conducted with eight shop-owners of the VP participating shops. The time border for the study is from the beginning of the VP at 2009 until the end of 2014.

The study concluded that the contribution of the WFP VP to the quality development of the participating local food producers in the Gaza Strip is considered positive and moderate, with a mean of 63.36%. While it showed a low contribution of the WFP VP to the production development with a mean of 55.29%. The contribution of the WFP VP to the Human Resources Management development was small with a mean of 42.95%. However, the study showed a positive contribution of the WFP VP to the marketing performance development of the participating local food producers in the GS, with a mean of 66.12%.

In view of the study's results, analysis, and conclusion; a set of recommendations were formulated and directed to the World Food Programme, local food producers and local authorities, which, if implemented, would hopefully maximize the potential impact of the WFP voucher programme on the local food industries in order to achieve a comprehensive and sustainable development in the Palestinian local economy.

ملخَّص الدراسة:

تهدف هذه الدراسة إلى تحديد مدى مساهمة برنامج القسائم الشرائية التابع لبرنامج الأغذية العالمي في تطوير منشآت الصناعات الغذائية المحلية المشاركة في قطاع غزة من خلال دراسة أربعة محاور للتطوير وهي الجودة، والإنتاج، والموارد البشرية، والأداء التسويقي.

تم استخدام المنهج الوصفي التحليلي لتحليل البيانات التي تم جمعها بواسطة استبيان من خلال مقابلات شخصية مع أصحاب/مدراء المنشآت مجتمع الدراسة والبالغ عددها 25 منشأة. بالإضافة إلى تحليل بيانات مجموعة بؤرية واحدة تم عقدها مع ثمانية من أصحاب المحلات المشاركة في البرنامج. والحد الزمني للدراسة هو منذ بدء البرنامج في 2009 وحتى نهاية عام 2014 م.

خلصت الدراسة إلى أن مساهمة برنامج القسائم الشرائية في تطوير الجودة لدى منشآت الصناعات الغذائية المشاركة تعتبر متوسطة وإيجابية بمتوسط بلغ 63.36%، في حين كانت مساهمة البرنامج في تطوير الإنتاج قليلة وبمتوسط بلغ 55.29%. أما مساهمة البرنامج في تطوير الموارد البشرية لدى هذه المنشآت فكانت متدنية بمتوسط بلغ 42.95%. في حين كانت مساهمة البرنامج في تطوير الأداء التسويقي للمنشآت المشاركة جيدة وإيجابية بمتوسط بلغ 66.12%.

وقد خرج الباحث بالعديد من التوصيات التي تم توجيهها إلى كلّ من إدارة برنامج الأغذية العالمي، وأصحاب منشآت الصناعات الغذائية، والسلطات المحلية، والتي من شأنها زيادة تأثير برنامج القسائم الشرائية على الصناعات الغذائية المحلية في قطاع غزة وعلى الاقتصاد الوطني الفلسطيني بشكلٍ عام.

CHAPTER ONE
RESEARCH FRAMEWORK

Introduction

Six decades of political instability, eight years of economic and social blockade and three devastating wars in a short span of time causing destruction of private and public infrastructure, have led to the decimation of the productive economy of the Gaza Strip (Mountfield, 2012).

The eight-years blockade has not given Gaza's local economy a chance to recover. Exports from Gaza are almost completely banned, imports are severely restricted and the flow of the most basic humanitarian goods has been suspended for years (UNCTAD, 2014).

The majority of the Gaza population has lost their productive assets as a result of the successive wars. Hundreds of businesses and workshops were damaged and livelihoods were lost. With limited activity at the commercial crossings and extensive damage to private infrastructure and other productive assets, business activities were largely paralyzed (OCHA, 2014a).

The cumulative impact of the restrictions on movement and access is severely curtailing the economic potential of the food industry in the Gaza Strip (GS), with resulting high levels of unemployment and increased food insecurity in a society where there is still significant economic reliance on the agricultural and manufacturing sectors (OCHA, 2014b).

The rate of private sector investment in the Palestinian economy has remained at a low level compared to the international standards. Manufacturing, usually a key driver of export-led growth, has stagnated since 1994, with its share of GDP falling from 19 percent to 10 percent by 2011 (OCHA, 2014b).

Food security is a major concern in the Gaza Strip. Around 57 percent of the households in the Gaza Strip are suffering from food insecurity and are unable to save their daily food

requirements without support, due to an economy dependent on external support, few employment opportunities, low incomes, and subsequent limited economic access to food (OCHA, 2014c; Mountfield, 2012).

In respond to the abovementioned, the World Food Programme (WFP), along with many partners, provides large-scale food assistance to the non-refugee population. WFP currently provides support through four main modalities: General Food Distribution, Electronic Cash Voucher, School Feeding and Institutional Feeding.

The WFP Voucher Programme (VP) is part of the WFP operations in Palestine, both WB and GS, to assist the recovery of the population and to inject money into the local economy (WFP, 2013a). The programme implementation is undertaken in partnership with Oxfam GB and MA'AN Development Center in the Gaza Strip.

Vouchers represent a form of food assistance; they include the provision of coupons to beneficiaries to purchase food for a fixed monetary value (value-based vouchers) in selected stores. They share a market-based approach under which beneficiaries are provided with purchasing power to access food (Stevenson & Gentilini 2008). This scheme does not only provide people with food, but also injects money into the local economy and supports local producers as most of the food items are locally produced (Harvey, 2005; Creti, 2010).

In recent years, there has been growing interest and practice in the use of vouchers. Such interest is fuelled by the fact that markets in developing countries function better than they used to, food systems are more integrated, the pace of urbanization is accelerating and basic financial services are increasingly diffused. Moreover, high international food prices have also increased interest in the use of vouchers under certain circumstances. Such developments are important for international assistance, as they often offer the opportunity to use innovative ways to support food-insecure people (Stevenson & Gentilini 2008).

Research Problem

In an unstable environment, such as the Gaza Strip, maintaining healthy food is one of the big challenges facing residents as well as relief organizations. WFP, through voucher programme, is getting at a food-secure environment where all Gazans have access to safe, nutritious and healthy food that provides them with active and healthy lives. For this purpose, WFP has been running a food voucher programme where thousands of Gazans receive food vouchers that used to provide access to food.

According to many of recent studies, WFP voucher programme imposed a wide primary impact on the residents benefiting by the programme; the people of Gaza and West Bank. However, the effect of voucher programme goes beyond the direct impact on the beneficiary households to have a secondary impact on the Palestinian local economy especially on the participating retail shops and on the local food producers in Palestine.

In view of that, and due to lack of rigorous information on the impact of the voucher programme on the local food producers, this research comes to fill the important information gap and to assess the contribution of the WFP voucher programme to the development of the local food producers participating in the VP. To state the matter more clearly, this study will seek to answer the main question:

To what extent does the WFP voucher programme contribute to the development of the participating local food producers in Gaza Strip?

Research questions

To answer the main question of this study, we need to test four sub-questions in order to reach an appropriate answer for the study's main question:

1. To what extent does the WFP VP contribute to the development of Quality of the participating local food producers in Gaza Strip?

2. To what extent does the WFP VP contribute to the development of Production of the participating local food producers in Gaza Strip?

3. To what extent does the WFP VP contribute to the development of Human Resources Management of the participating local food producers in Gaza Strip?

4. To what extent does the WFP VP contribute to the development of Marketing Performance of the participating local food producers in Gaza Strip?

Research Variables

To achieve the goal of this study, the researcher, based on the literature, came up with the following conceptual framework of variables:

Figure 1: Conceptual framework of Variables

Source: Conceptualized by Researcher, 2015

Study Hypothesis

There are two main hypotheses for this research:

1- **There is no significant differences among respondents toward the contribution of the WFP voucher programme to the development of participating local producers in Gaza Strip due to Personal traits (Gender, Age, Years of experience, Education level, Position).**

2- **There is no significant differences among respondents toward the contribution of the WFP voucher programme to the development of the participating local producers in Gaza Strip due to Organization traits (Years of operation, Geographic Location, Legal form, Current number of workers, Number of workers before VP, Current volume of invested capital, Period of participating in the VP, Type of products).**

Objectives of study

This study has the following objectives:

1- To assess the contribution of the WFP VP to the development of local food producers in Gaza strip.

2- To appraise the strengths and weakness aspects of the WFP VP on the local food producers.

3- To ascertain differences in the effect of the WFP VP on the quality, production, human resources management, and marketing performance development of the participating local food producers.

4- To provide information/recommendations that could help stakeholders to promote the programme design, implementation and follow up.

Importance of the study

The study is expected to be beneficial for the various stakeholders of this context, as the findings could substantially influence their decision making, programme design process and objectives definition.

The study provides WFP with significant information about the contribution pf the VP towards the local economy which promote their strategic shift from food aid to food assistance. Findings of the study could influence the programme design process of WFP investing more efforts in designing programmes that could capitalize in local economy.

As for the donors, the study helps them with allocating funds depending on their priorities. In addition, it provides them with a quantified feedback about the programmes' impact on the local economy necessary for their evaluation studies.

The study also provides the government with important information about the contribution of such programmes to the local economy and how to fully utilize them in the development plans by integrating the social safety net with the local economy development.

Local food producers would hopefully use results of this study to design more effective managerial schemes and how to further develop their businesses in a way that generates a higher return on investment.

For the potential research studies, the study is expected to be a base for upcoming similar studies conducted by researchers, organizations and institutes.

Scope and Limitations

The study aimed to assess the contribution of the WFP VP to the development of food production facilities whose products are being purchased by beneficiaries through the WFP VP. The time border for the study is from the beginning of the VP at 2009 until the end of 2014.

As to obtain a comprehensive overview on this contribution; the study should cover all the Palestinian territories; however, it was limited to the governorates of Gaza Strip due to the constraints imposed by the Israeli authorities on the movement to and from the West Bank.

In order to achieve the objectives of the study and answer the questions posed, the researcher had to overcome a series of difficulties and obstacles whether they are related to the authenticity of the subject of the study, the dearth of information, or not receiving enough cooperation from some of the local food producers who already perceived that the WFP VP has no effect on their businesses.

Definition of terms

WFP Voucher Programme in Palestine (VP)

The WFP voucher programme is part of the WFP operations in Palestine, both WB and GS, to assist the recovery of the population and also to inject money into the local economy and to support the local producers. The intervention strategy behind the VP is based on providing beneficiaries with more diversified food basket including animal protein-rich food which constitute the largest proportion of the total voucher value (WFP, 2015d).

Local Producers

The food production facilities located in the Gaza Strip whose products are being purchased by the beneficiaries of the WFP voucher programme through a network of pre-designated local shops in the Gaza Strip.

Cash Transfer

The provision of money, with or without conditions, to individuals or households, either as emergency relief intended to meet their basic needs for food and non-food items, or services, or to buy assets essential for the recovery of their livelihoods, or as a social safety net (ECHO, 2013a; ACF, 2008).

CHAPTER TWO
THEORETICAL FRAMEWORK

Introduction and background

The State of Palestine has been, and remains, subject to a set of specific constraints imposed by the occupying power that render the full utilization of human and economic resources impossible (PNA, 2012). The Gaza Strip is one of the most densely populated places on earth; with 1.71 million people in an area only 6-12 kilometers wide by 45 kilometers long, it has a population density twice that of New York City (Wanek, 2014).

The Palestinian economy fell into recession in 2014 following a sharp economic contraction in Gaza. The economic decline has had a severe impact on the livelihoods of Palestinians, particularly in Gaza. Preliminary estimates indicate that the Palestinian economy shrank by 0.4 percent in 2014 due to a strong contraction of nearly 15 percent in Gaza's real GDP, primarily as a result of the war that extended over 51 days during the third quarter of 2014. Notably, the Gaza economy was struggling even before the onset of the war (World Bank, 2015).

Overall unemployment increased to 27 percent. It amounted to 43 percent in the GS and 17 percent in the WB. Particularly alarming is youth unemployment in Gaza which soared to more than 60 percent by the end of 2014 – the highest in the region (World Bank, 2015).

The manufacturing sector has shrunk by as much as 60 percent in real terms. Gaza's exports virtually disappeared since the imposition of the 2007 blockade. The restrictions on external trade and on transfers to and from the West Bank prevent the realization of the Gaza Strip's economic potential. This is compounded by the restrictions on access to agricultural land and fishing waters, and the chronic shortage of electricity. Current constraints discourage investment, prevent sustainable growth, and perpetuate high levels of unemployment, food insecurity and aid dependency (OCHA, 2013; World Bank, 2015).

Food security is a major concern in the Gaza Strip. Around 57 percent of the households in the Gaza Strip suffered from food insecurity and another 15 percent were vulnerable to food insecurity (OCHA, 2014c). Israel bulldozed one-third of the arable land of the Gaza Strip in 2001 to create a buffer zone that runs the length of the Strip, which has led to an estimated reduction of 75,000 metric tons of production each year (Wanek, 2014).

Gaza's economy is dependent on large inflows of foreign aid and the livelihoods of the large majority of Gaza's households depend on aid. Donor aid and remittances have been the most significant drivers of Gaza's economy. According to UNWRA, 80 percent of Gaza's population depend on international donor aid and nearly 40 percent of them still fall below the poverty line (World Bank 2015; UNRWA, 2015).

Food has traditionally been the means used by many international NGOS including WFP for transferring resources to beneficiaries. The WFP strategic plan expanded the role of WFP from food aid to food assistance, introducing a more varied toolbox of responses, including cash and vouchers. This expansion in the available resource transfer modalities is intended to ensure that responses can be closely tailored to both the needs and the context of the people that WFP supports (WFP, 2009).

Food assistance is more complex today than even a decade ago with the untying of food aid and increased usage of vouchers and cash programs. The proliferation of options now requires more systematic analysis and planning for an appropriate response (Gilbert & Boubacar 2012).

Cash-transfer interventions are increasingly considered by donors and humanitarian agencies as an appropriate emergency response to meet immediate needs for food and non-food items, and to support the recovery of livelihood (Creti & Jaspars, 2006). Cash-based responses strive to increase the purchasing power of beneficiaries to empower them to meet their own needs (ADESO, 2012).

Voucher definition

A voucher is a paper, token or electronic card issued by an agency, company or State, which can be exchanged for a set quantity or value of goods, denominated either as a cash value or as pre-determined commodities or services. Vouchers are redeemable with pre-selected vendors set up by the implementing agency (Harvey & Bailey 2011; ACF, 2008). The vouchers may be denominated either in cash or commodity value, these are described respectively as value-based or commodity-based vouchers. (ECHO, 2013a).

a. **Cash voucher (value-based voucher)**: Cash vouchers has a specific value and specified food items for which to be exchanged. It allows the recipient to buy food items up to the cash value entitled to him. Alternatively the cash voucher gives the recipients freedom of choice as to what to purchase with their vouchers. The recipient can make purchases in one of the shops which have agreed to participate in the programme. The shop turns the vouchers into cash with the agency or with agreed financial service partner (Herrmann, 2009).

b. **Commodity voucher:** Commodity voucher stipulates items and their amount/weight for which the recipients can exchange their vouchers. They are exchangeable for a fixed quantity of certain goods, at any shops or distribution points which are participating in the scheme. The voucher could be for a single item (e.g. 1 kg of WHFL) or for a complete fixed food basket of several items. Combined vouchers (cash and commodity values) also exist (Herrmann, 2009).

Both types of voucher can be exchanged only for food; recipients cannot claim cash. Shops where vouchers can be exchanged are selected by WFP and/or cooperating partners (CPs) based on specific selection criteria (WFP, 2009).

World Food Programme (WFP)

The World Food Programme is the food aid arm of the United Nations system; it is the world's largest humanitarian agency fighting hunger worldwide. Born in 1961, WFP pursues a vision of the world in which every man, woman and child has access at all times to the food needed for an active and healthy life (WFP, 2015a).

Food aid is one of the many instruments that can help to promote food security. The WFP focuses its food assistance on those who are most vulnerable to hunger, which most frequently means women, children, the sick and the elderly (WFP, 2015a).

On average, WFP reaches more than 80 million people with food assistance in 75 countries each year. About 11,500 people work for the organization, most of them in remote areas, directly serving the hungry poor (WFP, 2015b).

The WFP has scaled up its use of cash and vouchers as food assistance tools. 7.9 million People received assistance through cash or voucher programmes in 2013. In the same year, the WFP purchased food in 91 countries; 86 percent of that food came from developing countries (WFP, 2015b).

The WFP operations are funded by voluntary donations from world governments, corporations and private donors. The organization's administrative costs are only seven percent, making it one of the lowest and best among aid agencies (WFP, 2015c).

The WFP coordinates and cooperates with a number of official partners in emergencies and development projects. These partners include national government agencies such as USAID, DFID, ECHO and EuropeAid; UN agencies such as the Food and Agriculture Organization (FAO) and the International Fund for Agricultural Development (IFAD); non-governmental organizations such as Oxfam GB, Save the Children, Catholic Relief Services and Norwegian Refugee Council (NRC); as well as corporate partners such as Boston Consulting Group (WFP, 2015c).

Cash and Voucher programmes: *Voucher as a modality of assistance*

For decades, humanitarian agencies have responded to the food needs of people suffering the effects of disasters and war by providing them with in-kind food aid (Bailey, 2013). Patterns of global food insecurity have changed dramatically over the last decade, with a rise in the number of extreme natural disasters, the persistence of conflict in some countries and overall growth in the number of major humanitarian emergencies. At the same time the nature of the response has changed, as key donors move from in-kind food aid to food assistance. Cash transfers have increased, and social protection and hunger safety nets are playing an increasingly important role (Harvey et al., 2010a).

Cash and voucher transfers can be used to support beneficiary purchasing power in order to respond to a range of humanitarian needs including food and non-food items, access to basic services, or contribute to livelihood recovery (ECHO, 2013b).

Cash transfers are not a panacea; nor are many of the concerns that still being used in humanitarian response realized in practice. Aid agencies and donors have accepted that cash and vouchers can be appropriate and effective tools to address a wide variety of needs, from accessing food to rebuilding and supporting livelihoods (Bailey, 2013).

The use of cash-based as opposed to in-kind assistance remains a relatively new approach; aid agencies are at the early stages of developing guidelines and policies to implement cash projects. This has meant that there has been a tendency to 'reinvent the wheel' each time cash projects are implemented. Project managers appear to lack support and guidance about the practicalities of how to most efficiently and effectively deliver cash to people (Harvey et al., 2010b).

Despite increased use of the modality, cash and voucher programming remains limited in scale compared to in-kind humanitarian assistance. It is most commonly used in the food assistance sector, although there is increasing uptake in other sectors such as water and sanitation and shelter (ECHO, 2013a).

Cash and voucher relief in history

Cash-based responses have a long history, despite their frequent portrayal as new and innovative. Clara Barton, one of the founding figures of the American Red Cross, helped to organize cash relief following the Franco–Prussian War of 1870–71, and in response to the Galveston floods in Texas in 1900 (Harvey, 2007). In late nineteenth century India, famine responses included what we would today call cash for work programmes (Dreze and Sen, 1989). Cash grants were paid to refugees from Bosnia in the Austro-Hungarian empire in the 1870s (Manasek, 2005). In 1948, the British colonial administration in Sudan distributed cash to famine-affected populations, and cash formed part of a relief response in Tanzania in 1960 (Mwaluko, 1962). Millions were employed in cash for work projects in the early 1970s in Maharashtra of India. Large-scale cash for work programmes were implemented in Botswana in the 1980s; in 1985–86, labour-based relief programmes were providing employment to 74,000 people (Hay, 1986; Quinn, 1987). Although this is not an exhaustive list, it serves to make the point that providing people with cash in emergencies has a long pedigree, and should not be seen as new or exceptional (Harvey, 2007).

The potential for cash transfers becomes a more important issue for the humanitarian community. As a humanitarian tool, cash transfers were pioneered as an alternative to food aid in response to the 2004 Indian Ocean tsunami. A 2005 review by the Overseas Development Institute (ODI) found that cash transfers were under-utilized but that the provision of cash by aid agencies was on the rise. In less than a decade, and amidst much research and debate, cash transfer programming shifted from small-scale pilots to mainstream acceptance. It was established that cash and vouchers, where appropriate, could be used as alternatives and complements to most types of in-kind assistance, including food aid, shelter materials, non-food item kits, seeds and tools and livestock (Bailey 2013).

Cash and vouchers are a major reason why an increasing number of governments, donors and aid agencies have adopted the concept of ‘food assistance’ instead of ‘food aid’ (Harvey et al., 2010a). While definitions of food assistance vary, they all refer to a broader

set of tools than food aid. The WFP strategic plan describes WFP as a food assistance agency, and WFP has stated that it will seek to scale up and expand the use of tools that have been piloted successfully in particular locations, including cash and vouchers (WFP, 2013a). In a communication on humanitarian food assistance, the European Commission describes an important shift over the last 15 years from using in-kind food aid as a default response towards considering a wider and more effective set of food assistance tools (Bailey 2013).

Comparing Cash, Vouchers and in-kind assistance

Cash-based responses have often been compared to in-kind assistance. The in-kind food transfer is assistance to a targeted individual or household in the form of dry or wet rations or cooked meals (WFP, 2009). There has been a tendency to present the key issues in terms of the advantages and disadvantages of cash-based interventions (Harvey, 2005; Devereux, 2002; Peppiatt et al., 2001). This approach often presents theoretical drawbacks which may not be borne out in practice. It also tends to suggest that advantages and disadvantages are fixed rather than context-specific, whereas cash may be more effective than food aid in some contexts, but not in others (Harvey, 2007).

The key issues that need to be considered in comparing the relevance of cash, vouchers and in-kind transfers, which are in essence different tools, are summarized below:

a. **Cost-effectiveness:** Cost-effectiveness combines efficiency and effectiveness: the most cost-effective action is the cheapest way to reach the set goals (ACF, 2008). Cash programmes are likely to have lower transport and logistics costs. However, there may be other costs, such as a need for additional finance staff. Whether a cash grant is more cost-effective for recipients will depend on the prices of goods they purchase in local markets compared to the price it would cost an aid agency to deliver. There is also a need to take into account the relative costs to recipients of transporting in-kind assistance against the costs of travel to and from markets (Harvey, 2007). However, assessing cost effectiveness is rather more complex than this basic calculation. It is necessary to consider factors including the secondary economic effects of cash-based

transfers, and the extent to which vouchers or in-kind transfers are monetized by beneficiaries to meet other needs (ECHO, 2013a).

b. **Market impacts:** Any kind of resource transfer will impact on markets and local economies, and in deciding whether to provide cash or in-kind assistance these impacts need to be assessed. The main possible negative effect of cash transfers is the risk that they will cause or contribute to inflation in the prices of key goods (Harvey, 2007; ECHO, 2013a). Moreover, cash transfer can have knock-on economic benefits - multiplier effects - for local markets and trade if the money is spent locally, and it may stimulate agricultural production and other areas of livelihoods (Harvey, 2005)

c. **Choice, flexibility and dignity:** Competing issues need to be considered in deciding on the most appropriate degree of beneficiary choice. Greater choice fosters dignity and allows beneficiaries to meet their most pressing needs, in particular the heterogeneous needs of individual disaster- affected households and individuals (ECHO, 2013a). Cash allows recipients to decide what they should spend the money on. Greater choice may help to foster dignity in the receipt of assistance. Using banks as delivery mechanisms can also enhance dignity in the receipt of assistance by removing the need for people to queue at distribution sites (Harvey, 2007).

d. **Consumption and nutrition:** If a transfer has particular food consumption or nutrition objectives then food aid may be more likely to be consumed, and can be fortified to address micronutrient deficiencies. It has sometimes been argued that cash promotes dietary diversity by enabling people to buy a wider range of foodstuffs (Harvey, 2007).

e. **Targeting:** Targeting remains a problematic issue for all transfers, cash, vouchers and in-kind. There is a delicate balance to be struck between inclusion and exclusion errors, and the costs, including time, of the targeting exercise compared to financial and impact losses incurred through poorly targeted resources or delayed assistance. The need for effective targeting arrangements for cash in particular has been highlighted, given the attractiveness of the resource (ECHO, 2013a). Because cash is attractive to everybody it may be more difficult to target, as even the wealthy will want to be included. In practice, targeting cash projects does not seem to have been any more problematic than targeting in-kind assistance (Harvey, 2007).

f. **Corruption and security risks:** Cash may be more attractive than in-kind assistance, and so particularly prone to being captured by elites, to diversion or to seizure by armed groups. However, it may also be safer to deliver than in-kind aid, and avoids the risk of corruption, diversion or looting during procurement and transport. The attractiveness of cash may create risks both for staff transporting cash and for recipients once they have received it. Cash can be easier to hide though and may be easier to distribute discreetly and thus could turn out to be a safer modality as compared with more visible commodities (Harvey, 2007; ECHO, 2013a).

g. **Skills and capacity:** Implementing cash and voucher projects requires new skills and capacities from managing in-kind transfers. There is a need for additional administrative and finance capacity. Assessments and monitoring need to include analysis of markets and distribution networks (Harvey, 2007; ECHO, 2013a).

h. **Gender:** Concerns that cash may disadvantage women because they have less say in how it is spent have not been realized. Where cash has been specifically targeted at women it has given them greater control within the household. (Harvey, 2007)

Overall, choosing the right transfer modality or combination of modalities should be based on their comparative advantage in meeting beneficiary needs and achieving programme objectives. Cash and vouchers together with food provide additional flexibility in responding to hunger and nutrition issues, enabling a response tailored to the needs of beneficiaries and their contexts. A combination of transfer modalities can potentially mitigate the negative impacts of any one modality when used on its own (WFP, 2009).

It is assumed that the design of the project intervention include some response analysis to determine the appropriate combination of resources to use. Detailed assessment must always be used to identify beneficiary needs. The introduction of cash and vouchers requires an additional analysis of markets and a better understanding of the context to ensure that the transfer modalities are the most appropriate (CRS, 2015; WFP, 2009).

Emergencies context

Humanitarian relief is delivered in a huge range of contexts, from natural disasters to wars, from rich developed countries to poor developing ones. Sometimes, it is assumed that cash provision may be possible in relatively well-developed countries with banking systems, but not in less developed contexts, or that cash can be used in peaceful environments but not in complex emergencies. The experience challenges these assumptions, suggesting that cash or vouchers are a possible response, even where states have collapsed, conflict is ongoing or there is no banking system (Harvey, 2005).

Cash and vouchers may be appropriate in different phases of natural disasters, conflicts and complex emergencies (ECHO, 2013a):

a. The early stages of sudden onset emergencies (whether natural disasters or conflicts) may prove challenging for establishing cash transfers or voucher programmes. Markets may be disrupted, infrastructure damaged, people displaced and security threatened. But markets can recover quickly and in some contexts cash transfers may have a particular niche at the start of an emergency as an ideal tool to meet the heterogeneous needs of affected households.

b. In protracted crises markets often re-establish themselves, creating opportunities for cash and vouchers.

c. Cash and vouchers may have a particular value in building resilience and assisting the transition towards recovery and development, in particular through protecting or restoring livelihoods. Cash and voucher projects can help to revitalize local economies by increasing the volume of trade and number of traders, thus developing local markets. This in turn can stimulate production, dynamize trade, help traders establish new links with other markets and stimulate labour markets, thus supporting resilience and the transition out of the humanitarian phase.

WFP Voucher Programme in Palestine: *Context and Impact*

The United Nations World Food Programme (WFP) has been implementing a Voucher Programme (VP) in the West Bank and Gaza Strip since 2009. The VP aims at meeting food needs and improving dietary diversity amongst the non-refugee food insecure population by supporting beneficiary households to procure a specific part of their dietary requirement through existing market mechanisms. The intervention strategy behind the VP is based on providing beneficiaries with access to animal protein-rich food which constitute the largest proportion of the total voucher value (WFP, 2014).

The VP started as a pilot project providing assistance for a total of 2,335 non-refugee food insecure households. In 2011, WFP switched from paper vouchers to electronic vouchers, using smart cards and Point of Sale (PoS) device, a modality that supports enhanced monitoring. Currently, Beneficiary households of the WFP's regular voucher in the GS receive one smart card that is electronically credited with an equivalent of US$ 12 per month per person (between ILS 14 to ILS 96 according to the family size) that can be used to purchase essential food items namely bread, milk, yogurt, white cheese, eggs, pulses, tahina, cereals, zaatar/doqa, olive oil, vegetable oil, salt, rice, and wheat flour. Households can then redeem their cards in a pre-designated shop close to their place of residence (WFP, 2013a; WFP, 2014).

The VP has been regularly reviewed and fine-tuned; it has also been gradually scaled-up. In 2012, WFP started to shift part of the beneficiaries who received in-kind food to receive vouchers reaching about 35,000 beneficiaries. In June 2014, the caseload under the VP was increased to reach around 50,000 beneficiaries (9,000 HHs) in the Gaza Strip, in addition to 10,000 more beneficiaries (around 1,100 HHs) with a combined form of transfers (in-kind and voucher), as a pilot per the recommendations of an internal mid-term review. In total, voucher beneficiaries represented 23% of WFP's total planned caseload in the West Bank and Gaza Strip in 2014 (Al-Sahel, 2014).

The VP is being implemented in partnership with Oxfam GB (international NGO) and MA'AN Development Center (Palestinian NGO) in the GS, and Global Communities (international NGO) in the WB. Currently, VP uses a network of 252 local shops (177 in the WB and 75 in the GS) as procurement and distribution mechanisms, ensuring cash is directly injected into the local economy at the micro level. This is designed to have a positive secondary economic impact on local production, employment and small businesses (WFP, 2014).

One of the aims of the voucher modalities through shops would be to involve small shops in the proximity of the beneficiaries; ideally supporting the same shops where beneficiaries purchase their food items every day. In order to ensure food safety, the VP eligibility criteria required sufficient stock capacity, availability of sufficient cold storage, good hygienic conditions and ownership of a bank account and trading license (Creti, 2011).

The approach of the VP also ensures that beneficiaries can exercise some choice when selecting products and gives them flexibility as to when food is collected, compared to a food distribution mechanism. The VP thereby allows beneficiaries to use the resulting savings to spend on other items, such as fish and meat, or on repayment of debts and other basic non-food expenditures (WFP, 2013a).

WFP specifically aims to reduce the share of households with poor food consumption score, by preventing a decrease in the proportion of beneficiary household expenditure allocated to food, as well as promoting the procurement of locally-produced food. Accordingly, the VP promotes local production and procurement by making it conditional that items procured with the voucher are locally produced where possible (Al-Sahel, 2014).

Impact of the WFP Voucher Programme

Few studies were conducted to capture the direct impact of the WFP VP in Palestine on the beneficiary households as well as the impact of the programme on the local economy. They aimed to assess how effectively the VP is meeting its objectives and whether vouchers are an appropriate transfer modality in the context of the Gaza Strip. Below is a summary for these studies and a brief analysis for their main results regarding the impact of the VP at the levels of **beneficiary households** and **local economy**.

❖ Impact of VP at the level of Households

The voucher programme can be expected to improve the well-being of beneficiary HHs and reduce poverty. A lot of efforts have been made to improve the targeting to exclude non-poor households and ensure the inclusion of poor households (Levy, 2015).

The impact of the VP on beneficiary households is mainly measured against specific project outcomes like (i) food consumption score (FCS), (ii) nutritional adequacy and (iii) impact on household dynamics, dignity and preferences (Creti, 2011).

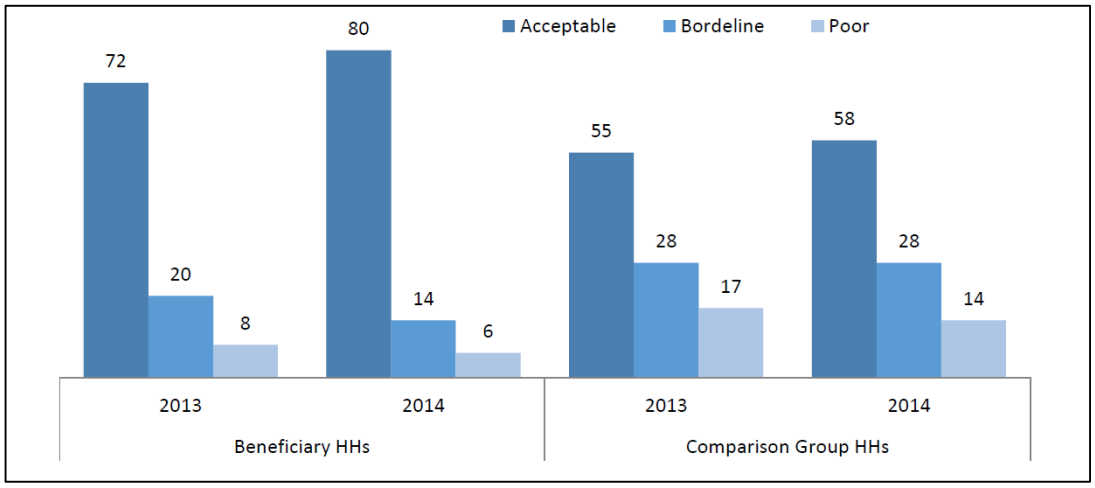
Impact of the VP on HHs' Food Consumption Score (FCS)

The impact on beneficiary HHs was mainly measured through calculation of the changes in HH food consumption score (FCS) which is a composite score based on dietary diversity, food frequency, and the relative nutritional importance of different food groups. The FCS is calculated using the frequency of consumption of different food groups consumed by a household during the 7 days before the survey. Scores are clustered into groups; the results of the analysis categorize each household as having either poor, borderline, or acceptable food consumption (WFP, 2008a). ***Al-Sahel*** survey results showed that proportion of VP HHs with acceptable FCS has increased from 72% in 2013 to 80% in June 2014 (8% difference) while the proportion of HHs among the comparison group (CG) with acceptable FCS has also increased to 58% in 2014 from 55% in 2013 (3% difference). Similarly, the proportion of HHs with borderline and poor FCSs in 2013

has decreased by 8% (from 28% in 2013 to 20% in 2014), compared to a 3% decrease among the comparison HHs group. The difference in FCS between the two groups in 2014 can be explained as being an effect of the VP. The "normal" difference in the FCS between the two groups was calculated assuming that both groups had the same FCS scores in 2013 (Al-Sahel, 2014).

According to beneficiaries, the VP brought significant changes in their diet. Beneficiaries increased consumption of dairy products, milk and eggs, which were not regularly accessed before the beginning of the project. These food commodities have now become an essential part of the beneficiaries' diet thanks to the VP. (Creti, 2011)

Figure 2: FCS for VP and CG HHs in 2013 and 2014



Source: Al-Sahel, 2014

Impact of the VP on HHs' Nutrition

The impact of the voucher on the main nutrition problems in the GS can only be measured through anthropometric and hemoglobin level measurements. However, it would be difficult to credit any change in the nutrition of a household to a single intervention, this is due to the compounding factors behind these nutritional problems (Creti, 2011).

Impact of the VP on HHs' dynamics, dignity and preferences

Previous studies suggested that, in addition to prioritizing female headed-households, the project has an impact on gender dynamics within the household. VP gave more decision power to women who had a say on which items to purchase. The VP reduced tension at household level, leading to less stringent restrictions on the women's mobility (Creti, 2011).

Choice, flexibility and dignity were the other positive aspects that beneficiaries. Beneficiaries were able to choose what they needed and to do so when they wanted. They appreciated the flexibility to decide when to go to shop and this gave them a sense of respect. They also mentioned that they were happy that their names were not exposed to public lists. The SMS system to inform beneficiaries when to collect the vouchers, was considered very discrete. Participants also mentioned that "we can bring our children in the shops without any worry of looking like begging" (Creti, 2011).

❖ Impact of the VP on the local economy

The effect of the VP goes beyond the direct impact on the household food consumption. Cash flow generated through vouchers can produce indirect effects, which can either strengthen or weaken the programme objectives, and specifically WFP strategic objectives. A beneficiary HH that spends the cash transfer generates additional income for the local economy. This can be distinguished into "first-round" and "higher-round" effects. The first-round effect is the additional income generated by the initial spending of beneficiaries, while higher-round effects describe the additional income from subsequent rounds of spending (Creti, 2011; Lehmann and Masterson, 2014).

The indirect effects are considered positive when money generated through vouchers is invested either in productive inputs creating short-term income or in assets that generate longer-term development. The effect of a transfer through vouchers may therefore spill over from the target population to the whole local economy (Creti, 2011).

Impact of VP on prices and inflation

The injection of vouchers into the local economy can increase the demand for certain food items and generate an upward pressure of commodity prices in the local markets. In order to predict the magnitude of this effect, factors such as the scale of transfer, local market structure, level of market integration, and local availability of the food items redeemed through vouchers should be assessed (Levy, 2015).

Studies showed that the injection of vouchers into the local economy of GS has not created an upward inflationary pressure on the price of the food items redeemed through vouchers. It is possible to assume that supplies would be able to meet the increased demand that may be created by a sudden scale-up of the voucher project without any impact on availability and prices, unless border trade is halted (Creti, 2011).

Impact of VP at the Level of Shops

The economic impact of the VP was quite confirmed by the previous studies through the analysis of changes in the participating ***shops' sales, investments*** *and* ***employment***.

One of the main economic benefits of the VP highlighted by the owners of participating shops is increased *sales turnover*. The turnover of shops and incomes were boosted well beyond the cash injection provided through vouchers.

Al-Sahel study reported an average increase of 39.7% in the participating shops' monthly sales compared to the volume of sales reported by them prior to the Programme. The highest increase in sales turnover was reported by owners of small shops, who indicated that their sales have nearly tripled since their participation in the VP. On average, each voucher dollar redeemed by beneficiaries generates 40 cents of additional sales for participating shops in Palestine (Al-Sahel, 2014).

In the same context, the ***Creti mid-term review*** showed that shops were able to raise their average monthly value of business to 108,500 NIS compared to 67,000 NIS before the start of the project. These figures represent an increase of the initial sales by 62%, of which

38% can be attributed to the vouchers and the remaining 24% to the spillover effects on the shops' business. This also suggests that each dollar invested through the voucher would generate an increase of 62 cents in the shops' turnover by and an income multiplier effect of 2.6 in the Gaza Strip (Creti, 2011).

In another context; results of previous studies also suggested that most participating shops reported new capital expenditures in their stores after their participation in the Programme, noting that these investments were only possible as a result of the increase in their sales. *New investments* involved shop expansion; purchasing additional cooling units, transport vehicles and other equipment; and internal decorations.

Al-Sahel study indicated that participating shop owners reported investing US$ 7,474 into their shops since the beginning of the VP, and the majority of them attributed this investment either entirely or to a large extent to the increased sales and business activity induced by the VP. This means that the VP has induced US$ 771,800 of investments into the Palestinian (both West Bank and Gaza Strip) economy since it was first introduced (Al-Sahel, 2014).

Creti Mid-term review suggested that many small shops were able to improve the storage capacity, to purchase generators and freezers and to register their trading license in order to participate in the project (Creti, 2011).

Regarding the *employment*, ***Al-Sahel*** study mentioned that the owners of all participating shops reported retaining more employees in 2014 than they did prior to the participation in the voucher programme, and most attributed this to their need to for additional help as a result of increased business activity. More specifically, the survey revealed that 77 full-time jobs have been created within the VP participating shops since the beginning of the Programme, thereby increasing their work force size by 42.8%. In contrast, non-participating shops laid off 1.7% of their workforce, and attributed this mostly to declining business activity. In other words, it could be concluded that the voucher programme has led to the creation of close to 225 new jobs (145 in the West Bank and 80 in the Gaza

Strip), a considerable achievement particularly in the Gaza Strip where unemployment is extremely high (Al-Sahel, 2014).

Creti Mid-term review showed that the level of employment increased from an average of 0.9 to 2.4 employees per shop that corresponds to a total of 35 people hired in the 9 shops surveyed by the study, as a result of the voucher project. In general two thirds of the employees were relatives of the shop owner and some shops could also benefit from unpaid support from family members (Creti, 2011).

Impact of VP at the Level of Dairy Processors

All studies conducted to assess the impact of the WFP VP in Gaza Strip on the local economy have focused on the dairy sector given that it represents a high percentage of the total commodities exchanged through the voucher. This entails that the level of cash injected in this sectors and the number of local actors involved in the supply chain makes the impact of the VP significant and it suggests that effects trickled down the different actors in the sector (Creti, 2011).

Al-Sahel study showed an evidence of positive secondary economic impact of the voucher programme on the participating dairy processors which reported a 58% increase in their average monthly sales prior to the programme, which is 23 times higher than the increase witnessed by non-participating processors. the reasons for their increased sales, participating dairy processors pointed to several factors, including increased market demand due to the VP, enhanced marketing and distribution strategies to participating and non-participating shops, increased production capacity, and introduction of new products (dairy and non-dairy). However, close to 65% of participating processors attributed their increased sales to higher sales to the shops participating in the VP, the proportion and value of increase in participating processors' sales that could be specifically attributed to the VP could not be measured by the survey. This is mainly due to the fact that none of the participating dairy processors was willing to divulge their sales records to these shops (Al-Sahel, 2014).

In another context, the study found that the total number of permanent jobs created in participating processors since the baseline was 260; or about 18.6 new jobs per dairy processor. Most of these jobs have been created in small and medium dairy processors, which have witnessed an increase in employment of 41% and 44% respectively; compared to a 17% increase in workers in large dairy processors. Employment in nonparticipating dairy processors has remained largely unchanged since the baseline (Al-Sahel, 2014).

Mountfield study showed that the food sector in Gaza is highly dominated by imports, mostly from Israel. Local products have not had much success and have to overcome perceptions of being of lower quality. Local production is often dependent on imported inputs and is vulnerable to changes in levels of supply. In this context the programme's success in the dairy sector, in terms of improvements both in quality and scale, is a real achievement. Also, results showed that jobs have been created in the dairy processing sector and probably in dairy farming and distribution. However, this seem to be mainly an expansion of existing family capacity rather than new paid jobs for people outside the family (Mountfield, 2012).

Creti mid-term review showed that the impact on dairy factories were found to be varied according to their size and it produced an increase in the income turnover of between 25% and 80%. Small-sized factories doubled the volumes and values of production and they attributed 80% of this change to the demand generated by vouchers. The medium-sized factories experienced less than 25% increase of business, and this was only partly due to the vouchers. The impact is equivalent to an income multiplier of 1.3 and 5 on medium-sized and small-sized factories respectively (Creti, 2011).

It also showed that some degree of long-term impact was predictable due to the increase in liquidity that allowed for making productive investments and new customers that, to a certain extent, will continue to purchase their products. However, a long-term impact was not tangible. The impact would be more sustainable if the duration of the increased demand was stable and predictable (Creti, 2011).

The Palestinian food industry Sector

The industrial sector is one of the important and vital productive sectors in any country and that because of its important role in laying the foundation for material progress, and because of its ability to make the required growth in all areas of economic, political and social affairs (Okasha & Abu Zarifa, 1998). Development of the industrial sector is a key objective for all developing countries to achieve the desired economic development. Development of the industrial sector means achieving a high rate of economic growth, creating many employment opportunities and thereby increasing economic diversification necessary to achieve social, technical and industrial development in those countries (Al-Burai, 2007).

Industry is playing an important role in the economic and social wellbeing of the Palestinian society. It employs about 13% of the total workforce and it contributes 16% to the GDP. Exports were, and still are, a good economic ambassador for the entire Palestinian economy. However, the political uncertainty and turbulences have affected the industrial sector negatively (Creti, 2010).

The Palestinian industrial sector is categorized by its wide variety of products and interrelated sub-sector branches. The sector lacks severely the adequate continuously available raw materials for the sustainability of the sector. But it has a great advantage of the dedicated hard working and resilient business community. The business community, as a driving force for the industry, was able to achieve several successes during difficult uncertain conditions (PFI, 2009).

The Palestinian food industry, one of the oldest industries in Palestine, has been recognized and operational for a number of decades. The history of the industry goes back to the early years of the 20th century with the establishment of a number of food processing factories and shops. The food industry has been one of the important and most rapidly developing sectors in Palestine. Food industry development and growth have been obvious in the last decade with total market sales of approximately $350 million per year (Akra, 2014).

The food industry sector is growing rapidly both vertically and horizontally. The official figures of the sector indicate that there are more than 2,776 working firms in this sector including bakeries. The sector is formed from 10 different sub-sectors, shown in table 1, which are performing differently due to different strengths in financial capacity, the availability of raw materials, and availability of qualified labor force, size of competition in the market and the extent of the Israeli impediments impact (PFI, 2009; ICC, 2014).

Table 1: Sub-sectors of food industry sector in Palestine

1. Processed Meats	6. Animal feed
2. Vegetables (Canned and frozen)	7. Chocolates And Confectionaries
3. Oils and Fats	8. Pasta
4. Dairy Products	9. Bottled Water, Soft Drinks And Beverages
5. Flour mills	10. Chips and snacks and others.

Source: Palestinian Central Bureau of Statistics (PCBS), 2013

The Food-processing sector is fast growing. In 2010, it contributed more than 24% of the industrial production value, 18% of the industrial value added total (ICC, 2014). While in 2012, the number of workers reached 14,010 in 2,776 establishments (PCBS, 2013).

Table 2: Food-processing main sub-sector in Palestine

Sector	Palestine		West Bank		Gaza	
	Estab.	worker	Estab.	worker	Estab.	worker
Food-processing Sector	2,776	14,010	2,218	10,476	558	3,534
Meet production	40	564	38	555	2	9
Fruit, Vegetables and Nuts production	277	1,559	200	1,041	77	518
Oil, animal and plant fat production	279	1,683	257	1,482	22	201
Dairy products	100	1,723	60	1,261	40	462
Grain mill products industry	133	454	103	295	30	159

Note: This table does not include Bakery.

Source: Palestinian Central Bureau of Statistics (PCBS), 2013

Importance of the Food Industry Sector in Gaza Strip

The food industry sector is considered a major part of the industrial sector in Palestine with a great deal of potential and importance as an imperative to achieve the strategic goals of the government's national plan of higher economic success both in the internal and international markets (Paltrade, 2009; ICC, 2014).

The importance of the food industry sector is also came from the direct relationship between the food industries sector and other economic activities, especially the agriculture sector, which is one of the main pillars of the Palestinian economy, where food industries contribute to stimulate this sector, which increases the value-added of agriculture and diversification of agricultural crops. The effect of the sector on the food security in Palestine, which is an important issue, is also considered a main reason for the importance of this sector (Nasser, 2005; ICC, 2014).

Taking into consideration the tremendous obstacles resulting from the Israeli occupation, policies, an incomplete legal and regulatory framework, or the lack of needed human and financial capacity, the current performance of the sector indicates large potential, which can play a major role in Palestinian economic growth and development (ICC, 2014).

In addition to the aforementioned, the status of the sector, represented in different statistics such as significant investment in the sector ($580 million), the number of employees and the contribution to the income and employment which is around 20% of the total labor force in the industrial sector in Palestine brings out the importance of the sector. This is coupled with the fact that the average Palestinian family spends 36%-38% of its income on food, thereby proving the importance of the sector (Creti, 2010; ICC, 2014).

For these reasons, it is important to place the sector as one of the priority sectors for the economy of Palestine when setting the economic and social development plans.

Food Industry Sector in Gaza Strip – SWOT Analysis.

A market analysis study for the main economic sectors in the Gaza Strip was conducted in October 2010 by an independent consultant, ***Pantaleo Creti***, for the benefit of Oxfam GB and came out with the following SWOT analysis results for the food industry sector in GS (Creti, 2010):

- Major *strengths* of Gaza's food industry sector include its favorable climate for agriculture production, constant internal demand, adaptability to border closure and relevant expertise. Regarding the *weaknesses*, the sector suffers from the high competition created by imported goods, reliance on some imported inputs, packaging and machinery from Israel and Europe. The sector presents very individualistic behavior, poor quality control and product presentation, inadequate infrastructure (for example, cold storage capacity) and lack of market intelligence.

- The food industry sector has demonstrated resilience, the *opportunity* to gain a better share of the local market and to access new niche markets. The sector offers very strong opportunities for creation of rapid employment because of its labour intensity and its linkages with agricultural labour. The sector can also increase the demand for local agro-products and produce trickle-down effects to the agriculture sector as a whole. The *threats* are mainly related to the unstable political situation and to the reduction of cultivable lands due to wars and climate change.

- The sector has some competitive advantage for niche products, as well as advantages from its cultural specificity, but the import from neighboring countries raises competition on both price and quality. Although the sector has been severely hit by the border closure, it has been more resilient than others and it has experienced a slow re-orientation and development towards local markets. The sector has high potential in the region because of its ethnic and religious background, and also for niche markets like organic food. In the past the food processing sector has been forward-looking in terms of developing new products and reaching out to export markets (tomato pastes, sweets, pickles). However, at this stage, it is difficult to build

plans on export strategies due to the unpredictability of the political situation and border closure.

- The sector seems less proactive regarding investments for improving quality and efficiency of products and this affects its competitiveness. Consumers prefer imported goods because they have better quality, better packaging and, sometimes, are less expensive. Moreover, while the base of food processors and manufacturers is wide, support institutions are inadequate and they have decreased their capacity to support the sector in the last years.

CHAPTER THREE
PREVIOUS STUDIES

Introduction

Many studies have been written in the field of food industrial sector in Palestine and tried to identify its characteristics, reality, and prospects for development. In another context, many other studies have tackled the voucher programmes and their impact on local economies of the countries they are implemented worldwide.

This part of the study will highlight the main and most relevant studies conducted in these fields. The studies have been divided into three categories, local, regional and international studies.

Local Studies

Al-Sahel (2014). "Secondary impact of WFP voucher programme on the dairy sector value chain in Palestine".

A Palestine-wide study that was undertaken through two rounds of data collection in 2013 and 2014 as to capture the secondary economic impacts of WFP VP in Palestine.

The study focuses on assessing the direct impact of the VP on the beneficiary households as well as the economic effects of the VP on the various local actors of the dairy supply chain, which is one of the main locally-produced commodities of the VP, including beneficiary households, participating shops, local dairy producers whose commodities are redeemed through the VP, and cow breeders supplying fresh milk to these producers.

The research methodology was based on a quantitative measurements entailing a survey of all actors in the dairy sector value chain including 96 beneficiary HHs, 60 participating shops, 17 participating dairy factories and 59 cow breeders in WB and GS through a time series with a non-equivalent control group. Counterfactual evidence is also provided in the report through analysis of data collected from comparison groups including 128 non-

beneficiary HHs, 60 nonparticipating shops, 14 nonparticipating dairy factories whose products are not sold in the participating shops and 40 cow breeders supplying fresh milk to these producers.

The study shows evidence of positive secondary economic impact of the voucher programme on the participating dairy processors which reported a 58% increase in their average monthly sales prior to the programme, which is 23 times higher than the increase witnessed by non-participating processors. However, close to 65% of participating processors attributed their increased sales to higher sales to the shops participating in the VP, the proportion and value of increase in participating processors' sales that could be specifically attributed to the VP could not be measured by the survey. This is mainly due to the fact that none of the participating dairy processors was willing to divulge their sales records to these shops.

The survey found that the total number of permanent jobs created in participating processors since the baseline is 260; or about 18.6 new jobs per dairy processor. Most of these jobs have been created in small and medium dairy processors, which have witnessed an increase in employment of 41% and 44% respectively; compared to a 17% increase in workers in large dairy processors. Employment in nonparticipating dairy processors has remained largely unchanged since the baseline.

The study recommended to further promote the VP in WFP's operations in Palestine. The specific recommendations are for WFP to:

1- Promote the expansion of the VP on the basis of the positive direct and secondary impacts it has induced and to have a more significant impact on the level of dairy processor and farmers.

2- To set a specific value of the voucher allocated to dairy products to be 40% or higher, or to limit the addition of more food items within the approved voucher commodities, that would decrease the value spent on dairy products.

3- Ensure targeting medium and small size dairy producers and encourage them to deal with medium and small size farmers.

Mountfield (2012). "Cash Voucher Programme: Review of voucher assistance as a safety-net transfer modality in the Gaza Strip".

The study aimed to review the WFP Voucher Programme as safety-net transfer modality in the GS. It provided a deep analysis for all aspects of the programme regarding the process, targeting, cost effectiveness and efficiency and contingency management.

The main approaches used were semi-structured interviews with key informants and stakeholders to the project, and focus groups of project beneficiaries and field staff. Focus groups were primarily used to triangulate and validate hypotheses suggested by the data analysis, place findings in context, and explore weaknesses and gaps in the data. Visits were undertaken to shops participating in the programme and others, as well as to three local producers of dairy products in the GS.

In terms of its broader objectives, results showed that the VP has had a significant and positive impact on the productive capacity of the dairy processing industry in Gaza, and there remains significant potential for further growth in this sector. There is also evidence of other knock-on and multiplier effects associated with the programme.

The study showed that the food sector in Gaza is highly dominated by imports, mostly from Israel. Local products have not had much success and have to overcome perceptions of being of lower quality. Local production is often dependent on imported inputs and is vulnerable to changes in levels of supply. In this context the programme's success in the dairy sector, in terms of improvements both in quality and scale, is a real achievement.

Also, results showed that jobs have been created in the dairy processing sector and probably in dairy farming and distribution. However, this seem to be mainly an expansion of existing family capacity rather than new paid jobs for people outside the family.

The study provided many valuable recommendations, one of them is to revise the list of approved items for voucher redemption should to meet the needs of the beneficiaries and support the broader aims of the project.

Creti (2011). "Mid-Term review of the WFP voucher programme in Gaza strip".

A study commissioned by WFP and Oxfam GB with the aim to assess how effectively the VP is meeting its objectives and whether vouchers are an appropriate transfer modality in the context of the Gaza Strip. The specific objectives were to review the current voucher implementation modality, to compare the cost-effectiveness of voucher compared to the in-kind assistance, and to propose recommendations for the design of the VP component in the next WFP operation in the GS.

The fieldwork focused on focus group discussions and interviews with implementing partners, project beneficiaries and different market actors and the analysis was mainly qualitative. Interviews were conducted with nine shop-owners and three dairy factories, in order to assess the impact of the voucher project on their businesses.

The impact on dairy factories were found to be varied according to their size and it produced an increase in the income turnover of between 25% and 80%. Small-sized factories doubled the volumes and values of production and they attributed 80% of this change to the demand generated by vouchers. The medium-sized factories experienced less than 25% increase of business, and this was only partly due to the vouchers. The impact is equivalent to an income multiplier of 1.3 and 5 on medium-sized and small-sized factories respectively.

Some degree of long-term impact was predictable due to the increase in liquidity that allowed for making productive investments and new customers that, to a certain extent, will continue to purchase their products. However, a long-term impact was not tangible. The impact would be more sustainable if the duration of the increased demand was stable and predictable.

At the end, the study recommended a gradual scale-up of the voucher project to include more beneficiaries considering the positive impact on food consumption, the potential positive effects on nutrition and the multiplier effects on the local economy.

Abu Rmeileh (2011). "Food industries in Hebron, Reality and Challenges".

This study aimed to identify the reality of the food industries in Hebron City and the extent of its contribution to the industrial sector. In addition to identifying the main problems confronting this sector and the prospects for its development. Also, to determine the proper methods for reinforcing and developing the products quality in order to be able to compete the imported products.

The analytical descriptive method was used to analyze the results of the study's questionnaire that was distributed to the whole study population of 56 food producers in Hebron City.

The study showed that the reality of food industries sector in Hebron City is satisfactory to a certain level, however it needs more improvement. It showed a lack of utilization of production capacity, which was attributed to the strong competition in the local market and the weak local demand, followed by the presence of Israeli obstacles on exportation, lack of raw materials and finally the lack of professional expertise.

The study recommended that food producers should apply a quality control system or to have a quality certificate in order to achieve a competitive advantage for their products which would help them in marketing their products in the local and external markets. It also recommended producers to change the family management style in managing their factories, and to pay more attention to the workers and their development through training and motivation. Also to have a clear marketing plan in order to be able to compete other products in the local and external markets.

Al-Burai (2007). "Measuring the level of Competitive Capabilities of Food Manufacturing Establishments in the Gaza Strip".

The study aimed to explore the level of competitive capabilities in food industrial sector in the Gaza Strip. It presents the importance and sources of these capabilities and their relation with strategic planning.

It relies mainly on both the analytical descriptive and the field study methods, where a special questionnaire was designed and distributed to a sample of 125 food producers in the GS.

The study shows that there are satisfactory results, however need more improvement, in certain fields of competitive capabilities such as the domains of mission and vision, customer care, managerial and organizational structure, production planning, human resources, product and market strategies, and marketing operations. While in other fields like technology, research and innovation, international management and human resources the results were unsatisfactory.

At the end, the study recommends that food producers need to allocate more financial resources for technology; they need to cooperate with some training institutes for building the capacities and skills of their workers; they also have to radically change their perspective with regard to innovation and development concepts by establishing specialist centers and recruiting specialists.

Al-Aghbar (2007). "Analysis and Evaluation of Current Situation of the Food Industries in Nablus City".

This study is concerned with the analysis and evaluation of current situation of the food industries in Nablus city in terms of the importance of industrial location and decision making in allocation of industries, as well as identifying strengths, weaknesses, opportunities and available potentials to develop these industries.

The major aim of this study is to identify the significant factors that affect the selection of the food industries in Nablus city, and determining the factors that contribute to the development and promotion of these industries.

The methodology of the study was based on the descriptive and analytical research methods, using the tools of the questionnaire and field survey of the locations of food industries in Nablus, and the available data from the related official sources.

Results of the study indicated that most of the problems and obstacles facing the food industries sector in Nablus city such as obstacles in importing raw materials and exporting the products are due to political and security reasons. Also, it emphasized that increasing the production volume, improving its quality and diversifying its products through

increasing the invested capital and number of workers and increasing their productivity are considered the main factors that contribute to the development of the food industries.

The study recommended the necessity of protecting the food industries and both the local and national products. In addition, it emphasized the necessity of making future plans for the food industries in Nablus city in the light of the need of local markets, and the requirements of the general planning of the city.

Quffa (2006). "The Developmental Horizons for the food Industries Sector in Palestine. A case study for the Food industries in the Gaza Strip".

This study tackles the developmental horizons for the food industry sector in Palestine. It tries to clarify the weaknesses of the Palestinian food industries in competing the imported products due to some internal and external reasons. Also, to identify the obstacles and constraints that still confronting the sector of food industries in Palestine. Plus, determining the proper methods for reinforcing and developing the products quality in order to be able to compete the imported products. And finally putting some policies and recommendations to overcome the problems in this sector.

The analytical descriptive method was used to analyze the results of the study's questionnaire that was distributed to a sample of 124 food producers in the Gaza Strip.

The study magnifies some important results such as the weakness of training levels for labors in these sectors and relying completely on Israel in obtaining the raw materials. In addition to the misuse of the production energy and depending on the self-financing, and marketing the production in the Gaza Strip markets besides the poor quality and the weak role of the Palestinian MONE in supporting the producers. The study proved the effective role of the Israelis in hindering the ability of exporting; as well as, it proved that the internal competition in the local market is the first rank of competition, then the WB production, then the external competition with other countries.

At the end, the study came to a conclusion of recommendations such as freeing the borders of the Israeli interference, committing to the high quality standards, improving the labors through training, working on opening opportunities for external markets, reinforcing the Ministry of Economics and the Palestinian food industries union to support the industry and finally increasing the financial support to these corporations and activating the role of banks.

Qrinawi (2006). "The Ability of Food Industry Sector in Imports substitution. Case Study of Gaza Strip".

This study discusses the ability of food industries sector in the Gaza Strip to substitute Israeli and imported products in the Palestinian local market in order to determine a strategy for increasing the efficiency and growth of the industrial sector and improving its competitive ability.

The study aimed to define the potentials of Palestinian food industries, to analyze the mechanisms by which the food processing industries in the GS could raise its productive and operational capacity and to improve its ability to implement substitution strategies.

The primary data were obtained through two questionnaires, one was distributed to a sample of owners of food production facilities and the other was distributed to a sample of consumers in the Gaza Strip.

Results showed a weakness of the PNA role in supporting the local food products. It also showed a low level of utilization of production capacity, which would increase the costs and thus decrease the ability for competition. It pointed out that most of the food producers in the GS are facing many problems in marketing their products due to high costs, limited local market, competition with imported products and most importantly the Israeli restrictions imposed on exportation.

The study suggested that improving the quality of local products is the first priority to compete with the imported products and to get the customer satisfaction as well. It also recommended PNA to adopt a policy for imports substitution as to substitute the imported products and to create a competitive economy in the future.

Nasser (2005). "Food industry sector in Palestine".

The aim of this study was to identify the reality of Palestinian food industry sector. It tried to analyze the strengths and weaknesses therein and to find opportunities for development. Besides, to identify threats that could impede food industry success in order to suggest appropriate strategies to enhance the competitiveness of this sector.

The study used a group of questionnaires distributes among samples of consumers, producers, distributers, farmers and retailers in order to assess the ability of local food industries to compete with other sources and to identify the main problems faced by the sector. Also, a series of interviews were conducted with a number of experts and officials in the food industry sector.

The study provided many recommendations for producers such as the dire need to improve quality and packaging of the products; to improve the marketing and promotion practices, and to produce new products that meet the needs of customers and make an alternative to the imported products.

The study also recommended the Union of Palestinian food industries to provide training programmes for the workers in the food industry sector and recommended the public sector to improve the quality standards and specifications and to apply them on the local products.

Al-Haj Mustafa (2005). "Competitiveness in the Palestinian Food Industries: Horizons and Development".

This study tackled the Palestinian economy and its structure and focused mainly on the competitiveness of Palestinian food industries sector.

The data were obtained through two questionnaires, one was distributed to a sample of 50 food producers and the other was distributed to a sample of 40 consumers in the West Bank governorates.

It showed that, although it has been partially released from Israeli constraints, the Palestinian economy is still highly affected by the Israeli measures and it is constantly susceptible to the minimum political changes.

The study showed that the competitiveness on the food industries sector is considered moderate; some of types of these industries are considered competitive on the basis of price and other are competitive on the basis of quality.

It indicated that food industry is one of the most fast-growing sectors among other industries. However, it showed that most of the Palestinian food industries are considered family business and individually owned and the size of these facilities are typically small.

It identified many problems that are faced by this sector such as dependency on imported raw materials, lack of professionals and experts in the field of food production, lack of specialized laboratories, weak linkage between other industries and insufficient external promotion and advertising.

At the end, the study recommended food producers to improve the production efficiency through using new technologies and to improve the HR management through better compensation systems for the workers and providing them with training programmes. It also raised their concern to improve promotion and advertising techniques and to the consider customer satisfaction through improving the quality of the products and the products packaging and labeling.

Miqdad and others (2004). "Mechanisms of replacing imported goods from Israel".

The aim of this study was to identify the most consumed imported products in the occupied Palestinian territories and the ability to replace them with local products. It also aimed to identify the quality of local products and the ability to protect these products.

The researcher concluded that there is a great need to start focusing on food and agricultural industries in their various forms in order to achieve the desired economic development as they constitute an important priority in the replacement of the imported products.

The study identified a range of factors that contribute to the ability of substitution of imported products with local ones. These factors are improving the quality, reducing prices, improving the form and packaging, promotion and advertising attention, and local and international certificates of quality.

Miqdad (1999). "Performance analysis of the small-scale industries in the New Palestinian Entity".

This study examined the performance of the industrial sector in the Gaza Strip; it compared the characteristics of firms as well as performance and efficiency indicators for different types and sizes firms. The study also investigates and analyses restrictions and problems face the industrial sector in the GS.

The study shows that performance in the industrial sector in the GS is influenced by a number of factors, such as the type of industry, size of the business and the prevailing political situation and the Israeli constrains affect it substantially.

The study proved that the clothing sector achieve a high percentage of profits comparing to the food industries sector. Also, it identified many factors that affect the performance in the industrial sector in the GS such as the lack of raw materials, limited financial support and the traditional old technology dominant on this sector.

The study recommended the need to provide an appropriate atmosphere for workers, in order to get all the potentials they have through the application of a fair system of incentives to guarantee labor rights in the fixed time regular. Also, he recommended that human resource development and refinement of personnel and training, which will affect positively on productivity, must be taken into great consideration.

Regional Studies

Husain and others (2014). "Economic impact study: Direct and indirect impact of the WFP food voucher programme in Jordan".

The intent of this study is to estimate the economic benefits of the food voucher programme implemented by the WFP for 536,000 Syrian refugees in Jordan. It offers insights into the economics of the programme and documents its direct and indirect effects on the Jordanian economy.

The study employed a two-pronged approach whereby the first component estimates how the cash flow from the VP is spent by participating retailers, allowing insights into direct effects of the VP. The second component is an input-output analysis to estimate the indirect economic effects of the programme. Interviews with beneficiaries, NGO cooperating partners, supermarkets involved in the VP, key ministries and WFP staff were conducted in order to gather data and understand their perspectives on the programme.

In terms of direct economic effects that are channeled through the retail outlets that participate in the programme, the study found that for every dollar spent by a voucher beneficiary, participating stores spend 85 cents on wholesale food purchases, 6 cents on operational costs, 3 cents on wages, 2 cents on taxes and 1 cent on capital expenditure. The programme has also led to some US$ 2.5 million investment in physical infrastructure by the participating retailers; created over 350 jobs in the food retail sector; and generated about US$ 6 million in additional tax receipts for the Jordanian government.

In terms of indirect effects, this study finds a predictive multiplier ranging from 1.019 to 1.234. In other words, WFP's plan to distribute US$ 250 million in vouchers during 2014 would lead to some US$ 255 to US$ 308 million of indirect benefits for the Jordanian economy. These indirect benefits are mostly concentrated in the agriculture, livestock and fishing, the manufacturing and the food products sectors.

The commodity purchases made by the retail outlets constitute the largest secondary impact of the VP. Although Jordan imports virtually all of its cereal requirements, but they are processed, milled, canned and packed locally. Much of the fresh foods that voucher recipients buy - such as poultry, eggs and vegetables - are produced locally.

The study recommended that WFP continue fostering the sustainability of its VP through promoting competition between retailers, minimizing uncertainty and ensuring a stable, predictable and transparent environment for retailers, and encourage competitiveness and preference for more locally produced commodities.

Bauer and others (2014). "Economic impact study: Direct and indirect effects of the WFP value-based food voucher programme in Lebanon".

This study aims to estimate the economic benefits of the WFP's largest voucher programme in the world that provides food vouchers to 1,029,778 Syrian refugees in Lebanon. It seeks to provide a clearer picture of how the programme functions, its impact on the local markets and its contribution towards localized direct and indirect economic benefits.

The study employs a three-pronged approach. The first component assesses project performance in terms of market competitiveness and price formation. The second component estimates the direct effects of the VP by analyzing Data collected from retailers and the VP database. The third component estimates the indirect multiplier effects of the programme using an input-output analysis.

The VP has had a large direct impact on participating stores, where revenue has doubled on average. It has created 1,300 jobs in participating stores since the start of the programme; overall, same-store employment increased by 74% in participating stores.

Generally, out of every dollar spent through the e-card 84 cents go towards purchasing goods; 5 cents for wages; 4 cents for operating costs; 1 cent for taxes; and 6 cents for profit.

The study also proved that the VP has significant indirect economic benefits, with a multiplier value of 1.51 in the food products sector. This means that if WFP distributes the planned amount of US$345 million in 2014, it could create additional indirect benefits of US$517 million for the Lebanese food products sector.

To get the most benefit from the programme, the study recommended that WFP should continue with value-based e-card vouchers. It should open additional stores in underserved areas and improve the criteria for store selection. WFP should monitor competition and open more stores in places where competition is at risk. Finally, WFP should consider working with large supermarket chains, in order to realize economies of scale and provide beneficiaries with more choice at lower prices.

International Studies

Barca and others (2015). "Qualitative research and analyses of the economic impacts of cash transfer programmes in Sub-Saharan Africa".

The study seeks to understand the impact of cash transfer (CT) programmes on household economy, local economy and social networks across seven countries of sub-Saharan Africa.

The study hypothesis that "the whole community, including non-beneficiaries, will benefit economically from the injection of cash through multiplier effects on local goods, services and labour markets" was partially confirmed. Across countries there were marginal positive effects on economic exchanges in local markets, although the aggregate injection of capital from the CT was usually too small to have a significant impact on the local economy.

The research showed scattered evidence that CTs provide stimulus to the local economy in the form of increased demand for consumption goods, inputs or assets, and increased demand for diversity of goods. These findings are supported by the tendency for poor people to spend locally, and on locally produced rather than imported goods.

It showed that the CT has intensified trading activities and economic exchange in local markets and provided a marginal boost to local businesses. Overall, impact on the local market was proportionate to the size of the CT and aggregate amount relative to the size of the community and local market.

The CT impacts on local labour patterns were generally positive, but marginal. Beneficiaries in some contexts were able to hire additional labour to work on their land, shifting their status in some cases from casual employees to employers.

Finally, the research raised a recommendation regarding the need for integration of CT with more effective livelihood support to economically active beneficiary households.

Kagin and others (2014). "Local Economy-wide Impact Evaluation (LEWIE) of Ethiopia's social cash transfer pilot programme".

This study seeks to estimate the economic benefits of the Ethiopia Social Cash Transfer Pilot Programme (SCTPP) that was introduced in 2011 with the support of UNICEF.

The impact of the SCTPP on the local economy was simulated using a Local Economy-Wide Impact Evaluation (LEWIE) model through business enterprise survey applied to the two areas that received the cash transfer, Hintalo-Wajirat and the town of Abi-Adi. The LEWIE methodology was designed to capture the full impact of cash transfer programmes on local economies, including on the income and productive activities of both beneficiary and non-beneficiary households.

The study showed that each dollar distributed in Hintalo-Wajirat generated an extra 1.52 dollar for a total income multiplier of 2.52. Similarly, each dollar distributed in Abi-Adi generated an additional 0.35 dollar, for a total income multiplier of 1.35. One reason why the multiplier in Hintalo-Wajirat is larger than in Abi-Adi is that the urban economy of Abi-Adi relies more on retail than does the rural economy which also engages in local crop production.

The income multiplier works through productive activities. According to the LEWIE model the transfers stimulate the production of crops by 0.2 dollar in the rural Hintalo-Wajirat, while the production multiplier for crops in Abi-Adi is 0.0, showing again the difference in economic activities between the town and the more rural economy. The largest effect for both areas is on the retail sector which has a multiplier of 1.35 dollar for Hintalo-Wajirat and a slightly smaller one of 1.25 dollar for Abi-Adi.

The study suggested that maximizing the income multiplier may require complementary interventions that target both beneficiary and non-beneficiary families.

Creti (2010). "The Impact of Cash Transfers on Local Markets. A case study of unstructured markets in Northern Uganda".

This study explores the effects of cash transfers on local markets. It tests the hypothesis that "cash transfers to poor households lead to integration of markets in remote areas and strengthen existing well-integrated market systems" through a case study in Northern Uganda. The case study focused on livestock markets, as most of the participants spent their grants on this sector.

The Uganda case study was built mainly on qualitative data, gathered through semi-structured interviews and focus group discussions with key informants and market actors. Descriptive analysis was validated and reinforced by quantitative information.

The qualitative analysis of multiplier effects showed that cash transfers had a wider economic effect on the local economy. Medium-size farmers were the main secondary beneficiaries, it is likely that 50% of the first round of expenditures passed through the hands of this group. They invested the additional income in productive assets and livelihoods' diversification. This contributed to creating additional goods and production. The comparative analysis with other case studies shows that medium scale farmers and local traders are the two groups that benefited more from the multiplier effects of cash transfers.

However, cash transfers did not produce any significant effect on the labour market because the transfers were very late in the planting season, the increased demand was not enough to produce significant changes in local wages.

The multiplier effects show that cash transfers had a positive impact on different market actors; they promoted investment and production. At the end, the study proposed a flexible step-by-step guidance that can be adapted to assess how cash transfers affect the local economy.

Davies and Davey (2008). "A Regional Multiplier Approach to Estimating the Impact of Cash Transfers on the Market: The Case of Cash Transfers in Rural Malawi".

This study analyses the impact of cash transfers as a form of aid, following a severe drought in one area of rural Malawi.

It has shown that such a programme can have wider economic consequences for the region, as beneficiaries spend their money on a wide range of locally produced goods and services. The additional money circulating in the district ensures that local businesses are also in a position to benefit from the cash transfers. Indeed, the multiplier was estimated between 2.02 and 2.45 for the cash transfer programme. That is, for each dollar transferred by the programme, additional income of over $2 is generated as beneficiaries spend their transfers with local businesses which themselves spend a portion of that income in the local area. The analysis also offered tentative evidence that the programme has served to stimulate production, encouraging employment or the setting-up of small businesses. This would ensure that increased local consumption is met by increased local supply. However, a study more focused on the employment impact would be needed to confirm this.

In addition, the study suggested that the economic impact of the programme is far-reaching. Not only there are potential benefits in terms of employment, but the programme also helps to support businesses during a period of the year which is usually particularly difficult.

Results showed that cash transfers should not be used under all circumstances; where the market is able to respond to increased demand cash transfers should be considered as an alternative to in-kind aid. Under the right market conditions, not only are the primary beneficiaries able to meet their needs, but the whole of the local community can become potential secondary beneficiaries.

Discussion of previous studies

Palestinian food industrial sector have received a considerable attention from many researchers; nine of the previous studies reviewed in this study have tackled this sector and identified its characteristics, reality, and prospects for development. They tried to identify the main problems confronting this sector in order to compete with other imported products in the local and external markets.

The analytical descriptive method using the tool of the questionnaire was used to analyze, assess and describe the results of the studies. Questionnaires were distributed mainly among samples of food producers and in some studies to other samples of consumers, distributers, farmers and retailers.

Most of these studies suggest that the *quality* of locally produced products remains poor which led to weak competitiveness against imported products as mentioned by (Quffa, 2006; Al-Haj Mustafa, 2005; Abu Rmeileh, 2011). In the same context, many studies assumed that improving the quality of local products is the first priority to compete with the imported products and to get the customer satisfaction as well (Qrinawi, 2006; Nasser, 2005; Miqdad, 1999).

A number of studies (Quffa, 2006; Abu Rmeileh, 2011; Qrinawi, 2006; Al-Burai, 2007) showed that the *production* management situation in the local food producers needs more development especially in utilizing the production capacity and setting production plans. (Al-Aghbar, 2007) assumed that increasing the production volume, improving its quality and diversifying its products are considered the main factors that contribute to the development of the food industries.

Also, (Al-Burai, 2007; Quffa, 2006) showed that the *human resources* management situation in the local food producers needs more development as well especially in the fields of training, insurance and incentives.

While the level of competitive capability regarding *marketing* operations in the food industries sector in the GS was satisfactory, it needs further enhancements as per (Al-Burai, 2007; Miqdad, 2004; Quffa, 2006; Qrinawi, 2006). They suggested that improving

quality, reducing prices, improving the form and packaging and diversifying the means of advertising would improve the marketing performance of the food producers in the GS.

On the other hand; voucher as a cash transfer modality have been tackled in the other nine studies. Three of them were applied in Palestine and aimed to review, assess and analyze the WFP VP and how effectively it is meeting its objectives and to provide a deep analysis for all aspects of the WFP VP regarding the process, targeting and cost effectiveness and efficiency. They aimed to assess the direct impact of the VP on the beneficiary households as well as the economic effects of the voucher system on the local economy and mainly on the dairy sector.

The other six studies were applied in other regional and international contexts and aimed to analyze, explore and estimate the impact and economic benefits of various voucher/cash transfer programmes on local economies and local markets.

The research methodology of these studies varied from using quantitative and qualitative data which have been collected through questionnaires, semi-structured interviews, focus groups and input-output analysis models.

Results of these studies showed an evidence of positive direct and secondary economic impacts of the voucher programmes on the local economies in terms of increasing sales, creating jobs and improving quality of local products. However, the long-term impacts would be more sustainable if the durations of these programmes were stable and predictable.

In view of that, this study comes to examine, assess and analyze the contribution of the WFP VP to the development of local producers in the four fields of quality, production, human resources and marketing performance. This would provide a wider and clearer image on the role and contribution of the VP to the development of Palestinian local food industries and empowerment of the Palestinian economy. This would fill the information gap that was not covered by the previous studies accordingly.

This study would be helpful for the WFP to formulate a strong strategy for implementing effective and efficient interventions considering their impact on the development of food industries in the GS rather than their primary impact on the beneficiary households.

CHAPTER FOUR
STUDY METHODOLOGY

Introduction

This chapter presents information about the methods used to apply this study. It describes the design of the selected approach, the population, the data collection and data analysis methods. In addition, information about the study instrument and its reliability and validity which appear at the end of this chapter.

Study design

The design of this study is a mixed-methods design, in which data has been triangulated (quantitative and qualitative). The analytical descriptive approach was used in this study; it tries to describe and assess the contribution of the WFP voucher programme to the development of the participating local food producers that will reflect on the empowerment and development of the Palestinian local economy in the Gaza strip.

The descriptive analysis approach describes the basic features of the data in the study, it presents quantitative descriptions of large amount of data in a manageable form that helps to simplify it in a sensible way; it compares, explains, and evaluates data in order to generalize meaningful results to enrich knowledge in the field of the study. (Trochim & Donnelly 2006)

This methodology reviews past studies to summarize the current knowledge in the area under investigation and to identify strengths and weaknesses in order to eliminate the potential threats, whilst bringing to the fore the potential opportunities. In addition, to predict the outcomes of the study in the coming stage.

Study population and sample

For the quantitative part, the study population consists of the owners/managers of the food production facilities in the Gaza Strip (namely respondents) whose products are being purchased by beneficiaries through the WFP food voucher programme.

According to the list of commodities/brands provided by Oxfam GB for the food items allowed to be redeemed through the VP, the number of participating food producers in the Gaza Strip is identified to be 29 facilities.

Because the size of the population is typically very small, the entire population is studied through applying a *comprehensive survey methodology*.

For the qualitative part, the study sample consists of eight shop-owners of the VP participating shops. The selection of shops to participate in the Focus Group Discussion (FGD) was based on the percentage of shops over the governorates of Gaza Strip as shown in the table below:

Governorate	Number of VP shops	Percentage	Number of shops for FGD
North Gaza	12	16%	1
Gaza	34	45%	3
Deir Al-Balah	6	8%	1
Khan Younis	18	24%	2
Rafah	5	7%	1
Total	**75**	**100%**	**8**

Data collection sources

Secondary Data

A range of secondary data were reviewed, including WFP VP specific documents and reports; previous reviews, evaluations and studies for the voucher and cash transfer programmes worldwide published by WFP and other UN agencies, international and local organizations, governmental entities and donors. Also, reports and raw data from PCBS and other governmental entities were utilized in this study.

Many textbooks, journals, academic theses, internet websites and other literature in the fields of food aid, cash transfer, emergency context, socio-economic situation, food industries, and industrial development were reviewed and used in this study.

Primary Data

Quantitative part: Interviewed questionnaires of 56 questions were used to collect the quantitative data. Face-to-face interviews took place with the owners/managers of the food production facilities in the Gaza Strip that represent the study population as described. One respondent from each facility of the study population was interviewed for a duration ranged from 45 to 90 minutes.

Qualitative part: One focus group discussion (FGD) was conducted with eight shop-owners of the VP participating shops. The FGD lasted for 120 minutes.

Study Instruments

For the quantitative part, an interviewed questionnaire was used to collect the quantitative data, it consists of three parts; first part contains questions about personal information of the respondents, second part contains questions about organizational information of the food producers under the study population; and third part contains 39 scale questions seek respondents' scale rating of their opinions regarding the four main development domains as follows: (Annexes 1 and 2 show the English and Arabic versions)

1- The contribution of the VP to the Quality development, 10 questions.

2- The contribution of the VP to the Production development, 11 questions.

3- The contribution of the VP to the Human Resources Management development, 8 questions.

4- The contribution of the VP to the Marketing Performance development, 10 questions.

For the qualitative part, one FGD with eight shop-owners of the VP participating shops was used to seek participants' views and opinions about the impact of the WFP VP on the local market and its contribution to the development of local food producers in the four studied fields which are Quality, Production, Human Resources Management, and Marketing Performance.

Response Rate

Total 25 out of 29 interviewed questionnaires were conducted with the owners/managers of the food production establishments that represent the study population at a response rate of 86.2%; the other four respondents mentioned that WFP voucher programme does not have any significant contribution to their development, and hence they refused to continue the interview. Three out of these four food production establishments are relatively big and their commodities redeemable through the VP are considered insignificant. The fourth food producer has only one product which is not frequently purchased/redeemed by the beneficiaries of the voucher programme.

Also, all shop-owners who were invited to participate in the FGD had positively responded.

Data Measurement Scale

Measurement scales refer to ways in which data are defined and categorized. Each scale of measurement has certain properties which in turn determines the appropriateness for use of certain statistical analysis methods (Kiess & Green 2009). The four scales of measurement are nominal, ordinal, interval, and ratio. In this study, ordinal scale is used.

Ordinal scale of measurement represents an ordered series of relationships or rank order. With ordinal scale, it is the order of the values is what's important and significant, but the differences between each value are not really known. Ordinal scales are typically measures of non-numeric concepts like satisfaction, happiness, discomfort, etc. (Market Research Man, 2012)

Likert-type scale used in this study is 1 to 10 scale; with one being no contribution and ten being high contribution, how much contribution did the voucher programme contribute to the development of the participating producers in the Gaza Strip? Fundamentally, these scales do not represent a measurable quantity nor do they indicate that the intervals between scales are equal.

Statistical analysis Tools

The researcher used quantitative data analysis method utilizing "SPSS 22". The researcher utilized the following statistical tools:

1- Kolmogorov-Smirnov test of Normality.

2- Pearson Correlation Coefficient for Validity.

3- Cronbach's Alpha for Reliability Statistics.

4- Frequency and Descriptive analysis.

5- Parametric Tests (One-sample T test, Independent Samples T-test, Analysis of Variance).

- ***One-sample T test*** is used to determine if the mean of a paragraph is significantly different from a hypothesized value 6. If the P-value (Sig.) is smaller than or equal to the level of significance, then the mean of a paragraph is significantly different from a hypothesized value 6. The sign of the Test value indicates whether the mean is significantly greater or smaller than hypothesized value 6. On the other hand, if the P-value (Sig.) is greater than the level of significance, then the mean of the paragraph is insignificantly different from a hypothesized value 6.

- ***Independent Samples T-test*** is used to examine if there is a statistical significant difference between two means among the respondents toward the contribution of the WFP VP to the development of the participating local food producers in Gaza Strip due to (*Gender*).

- ***The One-Way Analysis of Variance (ANOVA)*** is used to examine if there is a statistical significant difference between several means among the respondents toward the contribution of the WFP VP to the development of the participating local food producers in Gaza Strip due to (*Age, Years of experience, Education level, Position, Years of operation, Geographic Location, Legal form, Current number of workers, Number of workers before VP, Current volume of invested capital, Period of participating in the VP, Type of products*).

Test of Normality

The ***One-Sample Kolmogorov-Smirnov test*** procedure compares the observed cumulative distribution function for a variable with a specified theoretical distribution, which may be normal, uniform, Poisson, or exponential. The Kolmogorov-Smirnov is computed from the largest difference (in absolute value) between the observed and theoretical cumulative distribution functions. This goodness-of-fit test tests whether the observations could reasonably have come from the specified distribution. Many parametric tests require normally distributed variables. The one-sample Kolmogorov-Smirnov test can be used to test that a variable of interest is normally distributed (Henry & Thode 2002).

Table (3) shows the results for Kolmogorov-Smirnov test of normality. From this table, the p-value for each variable is greater than 0.05 level of significance, which means that the distributions for these variables are normally distributed. Consequently, parametric tests should be used to perform the statistical data analysis.

Table 3: Kolmogorov-Smirnov test of normality

Field	Kolmogorov-Smirnov	
	Statistic	**P-value**
The contribution of VP to the Quality development	0.756	0.617
The contribution of VP to the Production development	0.428	0.993
The contribution of VP to the Human Resources development	0.455	0.986
The contribution of VP to the Marketing Performance development	0.525	0.945
All fields	**0.622**	**0.834**

Validity of the Questionnaire

Validity refers to the degree to which an instrument measures what it is supposed to be measuring. (Pilot et al., 2002). Validity has a number of different aspects and assessment approaches. Statistical validity is used to evaluate instrument validity, which include internal validity and structure validity.

To insure validity of the questionnaire, expert validity and to two statistical tests were applied. First test is ***Criterion-related validity test (Pearson test)*** which measures the correlation coefficient between each paragraph in one field and the whole field. Second test is ***Structure validity test (Pearson test)*** that tests the validity of the questionnaire structure by testing the validity of each field and the validity of the whole questionnaire. It measures the correlation coefficient between one field and all the fields of the questionnaire that have the same level of similar scale.

Expert Validity

In order to ensure high level of reliability for the developed tool, it is important to review this tool to ensure its relevance to the main aim of the study and to identify any the potential problems with the questions.

The first draft of questionnaire was reviewed by a number of referees (see Annex 3) on both academic and professional levels from people who have had long-time experience in the field of the study. The feedback was received and taken into consideration when finalizing the final draft of the questionnaire.

Internal Validity

Internal validity is the first statistical test that used to test the validity of the questionnaire. It is measured the correlation coefficients between each paragraph in one field and the whole field.

Table (4) shows the correlation coefficient for each paragraph of the field ***"The contribution of WFP VP to the Quality development"*** and the total of the corresponding field. The p-values (Sig.) are less than 0.05, so the correlation coefficients of all paragraphs are significant at $\alpha = 0.05$, *so it can be said that all paragraphs of this field are consistent and valid to be measure what they were set for*.

Table 4: Correlation coefficient of "Quality development"

No.	Paragraph	Pearson Correlation Coefficient	P-Value (Sig.)
1.	Increasing the concern of improving the quality of products	0.616	0.001*
2.	Consulting specialists in the fields of nutrition and food processing	0.831	0.000*
3.	Using raw materials of higher quality	0.597	0.001*
4.	Testing the raw materials before production	0.802	0.000*
5.	Improving the storage conditions of the raw materials	0.866	0.000*
6.	Testing the products after production	0.831	0.000*
7.	Improving the storage conditions of the products after production	0.900	0.000*
8.	Improving the packaging and the final form of the products	0.813	0.000*
9.	Labeling the expiry date	0.677	0.000*
10.	Organization's attempt to apply a quality control system and to obtain quality certificates.	0.820	0.000*

* Correlation is significant at the 0.05 level

Table (5) shows the correlation coefficient for each paragraph of the field ***"The contribution of WFP VP to the Production development"*** and the total of the corresponding field. The p-values (Sig.) are less than 0.05, so the correlation coefficients of all paragraphs are significant at $\alpha = 0.05$, *so it can be said that all paragraphs of this field are consistent and valid to be measure what they were set for*.

Table 5: Correlation coefficient of "Production development"

No.	Paragraph	Pearson Correlation Coefficient	P-Value (Sig.)
1.	Developing clear plans to increase and develop the production.	0.505	0.005*
2.	Increasing the volume of production	0.811	0.000*
3.	Developing the production lines by adding new equipment and machines	0.745	0.000*
4.	Adding new production lines	0.722	0.000*
5.	Producing new products	0.710	0.000*
6.	Expansion and increase in the investment	0.836	0.000*
7.	Expansion and adding new assets (Land, building, warehouse, …)	0.597	0.001*
8.	Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	0.768	0.000*
9.	Increasing the utilization of production capacity through the optimum utilization of resources.	0.684	0.000*
10.	Increasing the supply channels of raw materials and dealing with more than one supplier	0.722	0.000*
11.	Developing an accurate and efficient inventory system that helps the effective functioning of the production process	0.476	0.008*

* Correlation is significant at the 0.05 level

Table (6) shows the correlation coefficient for each paragraph of the field ***"The contribution of VP to the Human Resources development"*** and the total of the corresponding field. The p-values (Sig.) are less than 0.05, so the correlation coefficients of all paragraphs are significant at $\alpha = 0.05$, *so it can be said that all paragraphs of this field are consistent and valid to be measure what they were set for*.

Table 6: Correlation coefficient of "Human Resources development"

No.	Paragraph	Pearson Correlation Coefficient	P-Value (Sig.)
1.	Developing a plan for the management of human resources	0.621	0.000*
2.	Hiring new workers	0.848	0.000*
3.	Hiring specialists in the field of nutrition and food processing	0.726	0.000*
4.	Improving the wages of workers	0.820	0.000*
5.	Providing workers with incentives like transportation allowance, food meals, gifts, etc.	0.828	0.000*
6.	Improving the contracts of workers	0.535	0.003*
7.	Providing workers with insurance including health insurance, insurance against accidents, fire, theft, etc.	0.700	0.000*
8.	Holding training programs for the workers	0.463	0.010*

* Correlation is significant at the 0.05 level

Table (7) shows the correlation coefficient for each paragraph of the field ***"The contribution of WFP VP to the Marketing Performance development"*** and the total of the corresponding field. The p-values (Sig.) are less than 0.05, so the correlation coefficients of all paragraphs are significant at $\alpha = 0.05$, *so it can be said that all paragraphs of this field are consistent and valid to be measure what they were set for*.

Table 7: Correlation coefficient of "Marketing Performance development"

	Paragraph	Pearson Correlation Coefficient	P-Value (Sig.)
1.	Increasing the market share of the products	0.590	0.001*
2.	Increasing the profitability	0.653	0.000*
3.	Expanding distribution channels to include new markets	0.688	0.000*
4.	Improving the means of promotion and advertising	0.557	0.002*
5.	Attraction of new customers other than the voucher programmes' beneficiaries	0.723	0.000*
6.	Increasing the interest in customer satisfaction	0.577	0.001*
7.	Achieving a competitive advantage for products	0.577	0.001*
8.	Competing with the Israeli and imported products in the local market	0.719	0.000*
9.	Improving the customers' mental image about the products	0.486	0.007*
10.	Producing products of different sizes to meet customer needs	0.529	0.003*

* Correlation is significant at the 0.05 level

Structure Validity of the Questionnaire

Structure validity is the second statistical test used to test the validity of the questionnaire structure by testing the validity of each field and the validity of the whole questionnaire. It measures the correlation coefficient between one field and all the fields of the questionnaire that have the same level of liker scale.

Table (8) clarifies the correlation coefficient for each field and the whole questionnaire. The p-values (Sig.) are less than 0.05, so the correlation coefficients of all the fields are significant at $\alpha = 0.05$, *so it can be said that the fields are valid to measure what they were set for to achieve the main aim of the study*.

Table 8: Correlation coefficient of each field

No.	Field	Pearson Correlation Coefficient	P-Value (Sig.)
1.	The contribution of VP to the Quality development	0.830	0.000*
2.	The contribution of VP to the Production development	0.925	0.000*
3.	The contribution of VP to the Human Resources development	0.743	0.000*
4.	The contribution of VP to the Marketing Performance development	0.824	0.000*

* Correlation is significant at the 0.05 level

Reliability of the questionnaire

The reliability of an instrument is the degree of consistency which measures the attribute it is supposed to be measuring (George & Mallery, 2006). The less variation an instrument produces in repeated measurements of an attribute, the higher its reliability. Reliability can be equated with the stability, consistency, or dependability of a measuring tool. The test is repeated to the same sample of people on two occasions and then compares the scores obtained by computing a reliability coefficient (George & Mallery, 2006). To insure the reliability of the questionnaire, Cronbach's Coefficient Alpha should be applied. Also, Minutes were taken also sound recording took place during the FGD.

Cronbach's Coefficient Alpha

Cronbach's coefficient alpha is used to measure the reliability of the questionnaire between each field and the mean of the whole fields of the questionnaire and whether all items within the instrument measure the same thing. The normal range of Cronbach's coefficient alpha value between 0.0 and +1.0, and the higher values reflects a higher degree of internal consistency. The Cronbach's coefficient alpha was calculated for each field of the questionnaire.

Table (9) shows the values of Cronbach's Alpha for each field of the questionnaire and the entire questionnaire. For the four fields, values of Cronbach's Alpha varied in the range from 0.759 and 0.889. ***This range is considered high; therefore the result ensures the reliability of each field of the questionnaire. Cronbach's Alpha equals 0.938 for the entire questionnaire which indicates an excellent reliability of the entire questionnaire***.

Table 9: Cronbach's Alpha for each field of the questionnaire

No.	Field	Cronbach's Alpha
1.	The contribution of VP to the Quality development	0.865
2.	The contribution of VP to the Production development	0.889
3.	The contribution of VP to the Human Resources development	0.796
4.	The contribution of VP to the Marketing Performance development	0.759
	All fields	**0.938**

Thereby, it could be said that the researcher proved that the questionnaire was valid, reliable and ready for distribution among the population of the study.

CHAPTER FIVE
DATA ANALYSIS, INTERPRETATION AND HYPOTHESES TESTING

Introduction

In this chapter the results of the study have been analyzed, explained, discussed and compared to the results of previous studies in order to assess the contribution of the WFP voucher programme to the development of local food producers in the Gaza Strip. The analytical descriptive method has been used to analyze and describe the findings of the study. The main questions and the hypotheses of the study have been tested in order to assess the contribution of the WFP VP to the development of local food producers in the main four fields of Quality, Production, Human Resources, and Marketing Performance.

Personal Traits

Gender:

Table No. (10) shows that the majority of respondents are Males and this represents 88.0% of the study population, while the remaining 12.0% are Females.

Table 10: Gender

Gender	Frequency	Percentage %
Male	22	88.0
Female	3	12.0
Total	**25**	**100.0**

According to the PCBS 2013 data, the vast majority of workers in the food industry sector in Gaza strip are males with percentage of 97%.

This might be attributed basically to the nature of work needed in this industry which requires physical efforts that the males can better provide; in addition to the fact that the Palestinian community's expenditure relies greatly on men considering they are the main breadwinners.

Age

Table No. (11) shows the age breakdown of respondents.

Table 11: Age

Age	Frequency	Percentage %
Equal or less than 30 years	5	20.0
31 to 40 years	6	24.0
41 to 50 years	10	40.0
51 to 60 years	4	16.0
More than 60 years	-	-
Total	**25**	**100.0**

The result shows that 20% of respondents are below 30 years old which represents the youth category, and 64% of the respondents are of the age between 30 and 50 years old which is the age category that relies on the self-financing due to the rarity of the financing institutions and the constraints imposed by the banks for financing the industrial projects in Gaza strip.

Years of Experience

Table No. (12) shows the years of experience of respondents.

Table 12: Years of Experience

Years of Experience	Frequency	Percentage %
Equal or less than 5 years	3	12.0
6 to 10 years	6	24.0
11 to 15 years	7	28.0
16 to 20 years	3	12.0
More than 20 years	6	24.0
Total	**25**	**100.0**

The results shows that the majority of respondents have more than 5 years of experience in the field of work which demonstrates the diversity of the working experiences among the respondents which in turn supports the results of this study.

Education level

Table No. (13) shows the educational level of respondents.

Table 13: Education level

Education level	Frequency	Percentage %
Less than Secondary School	3	12.0
Secondary School	10	40.0
Bachelor	8	32.0
Post-graduate Studies	4	16.0
Total	**25**	**100.0**

This finding shows that the percentage of the educated respondents is 88% which is a high percentage. This is due to the fact that the Palestinian society is an educated society, and also it indicates the availability of efficient technical personnel in the society that are able to work and produce if the appropriate circumstances were availed. The high level of education in the food industry would help greatly to manage, develop, and increase the production (Quffa, 2006).

Position

Table No. (13) shows the positions of respondents.

Table 14: Position

Position	Frequency	Percentage
Owner	1	4.0
Manager	6	24.0
Owner and Manager	14	56.0
Other (Senior staff)	4	16.0
Total	**25**	**100.0**

The result shows the nature of food industries as family business; that is 60% of the respondents are either owners or both owners and managers of the facilities. Furthermore, the majority of managers of these facilities are of the owners' relatives. This result corresponds with (Qrinawi, 2006) which showed that 71.3% of the food industries in the GS are managed by its owners. The findings also conforms (Abu Rmeileh, 2011) study which showed that 78.6% of the food facilities in Hebron are managed by its owners.

Organization Traits

Years of operation

Table No. (15) shows the years of operation of the study population.

Table 15: Years of operation

Years of operation	Frequency	Percentage
Equal or less than 5 years	7	28.0
6 to 10 years	4	16.0
11 to 15 years	7	28.0
16 to 20 years	2	8.0
More than 20 years	5	20.0
Total	**25**	**100.0**

This finding shows the diversity of the facilities' ages, which indicates that the food industrial sector in Palestine is evolving as mentioned by (Abu Rmeileh 2011). The finding also shows the increased interest towards the food industry in the GS in the latter years especially due to the increase in demand amidst the increase of population and the availability of labor force who are unable to find suitable jobs due to the continuous siege imposed by the Israeli authorities on the GS.

Geographic location of the facility

Table No.(16) shows the geographic location of the study population.

Table 16: Geographic location

Geographic location	Frequency	Percentage
North Gaza	9	36.0
Gaza	11	44.0
Middle	4	16.0
Khan Younis	1	4.0
Rafah	-	-
Total	**25**	**100.0**

The finding are consistent with the PCBS 2013 data that most of the food facilities are located in Gaza and North Gaza governorates; this is due to the fact that more than half of the GS population lives in these two governorates, in addition to the fact that Gaza City is one of the most important economical cities in Palestine.

Legal form of the facility

Table No.(17) shows the legal form of the study population.

Table 17: Legal form of the facility

Legal form	Frequency	Percentage
Individual	12	48.0
Partnership	4	16.0
Private shareholding	7	28.0
Public shareholding	0	0.0
Cooperative	2	8.0
Total	**25**	**100.0**

The table tells that Individual and Partnership facilities represent 64% of the study population, while the Private shareholding facilities represent 28%. This demonstrates the difference in the study population in terms of the business size, where that individual and partnership are mostly with small size because they depend on self-financing given the fact that people in Gaza prefer to have their businesses owned and managed by themselves, which in turn makes the business expansion slow and difficult and the development as well. However, the shareholding companies need more capital so be of larger sizes.

The difference in percentages of the study population could be ascribed to the different nature of their economic activities and different types of products they produce.

These findings are consistent to a certain level with the statistics of MOPIC 1998 which showed that 80% of food industries in the GS are individual or family businesses and 18% are private shareholding. It also conforms to the results of PCBS establishment census of 2012 that 86% of the industrial facilities in the GS are individual. They also go with (Quffa, 2006) that 82.3% of the food industries in the GS are individual and partnership while 15.3% are private shareholding.

Type of products

Table No.(18) shows the types of products that local producers produce and are redeemable through the VP.

Table 18: Type of products

Type of product	Frequency	Percentage
Dairy	7	28%
Olive Oil	1	4%
Wheat Flour	2	8%
Cereals	8	32%
Tahina	4	16%
Zaatar/Doqa	3	12%
Total	**25**	**100%**

The result shows that the Dairy producers represent 28% of the study population, which indicates the increased interest of the dairy producers in joining the programme due to the benefits they could get, as the redemption rate of the dairy products through the VP is considered the highest in comparison to the rest of locally produced products, as per the programme's database.

The Cereals producers represent 32% of the study population; most of these facilities are small in size and run by ladies who are mostly financed by donors as income-generating projects; WFP has agreed with some of those donors to market the products of those producers through the VP as a window of opportunity to increase the return of investment of those producers.

As for the Wheat Flour production facilities, the 2 units represented 8% of the study population, who in response to WFP's requirements, had started producing small and medium packages of WHFL as to be redeemed by the VP beneficiaries starting from March 2014. It is worth mentioning that the WFP supports the local WHFL mills, and so the local economy, through the local purchase of WHFL for the in-kind assistance provided by the WFP through other partners to the people of Gaza.

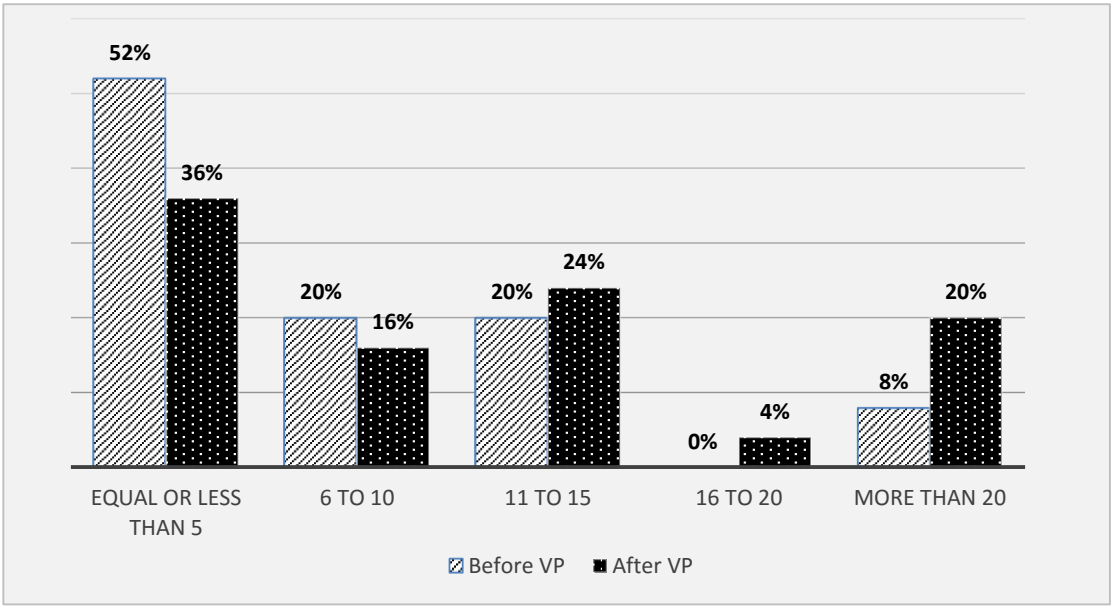
Number of workers

Table No. (19) shows the number of workers in the study population before and after participating in the VP.

Table 19: Number of workers

Number of workers	Before joining VP		After joining VP	
	Frequency	Percentage	Frequency	Percentage
Equal or less than 5	13	52%	9	36%
6 to 10	5	20%	4	16%
11 to 15	5	20%	6	24%
16 to 20	0.0	0%	1	4%
More than 20	2	8%	5	20%
Total	**25**	**100%**	**25**	**100%**

Figure 3: Number of workers



The result goes partially with the results of PCBS establishment census of 2012, published in 2013, which showed an increase in the percentage of facilities with small labor force, and a decrease of those with large labor force. The diversity in the number of workers of the study population could be attributed to the different nature of their economic activities and different types of products they produce.

When comparing the figures, it could be found that there is a noticeable change in the number of workers in the facilities after enrolling their products in the VP; the percentage of facilities with small labor force have been decreased while the percentage of facilities with medium to large labor force have been increased which indicates an increase of the labor force in these facilities after joining the VP.

This increase in the number of workers could be attributed to the participation in the VP; Study of (Al-Sahel, 2014) estimated the increase in number of workers in the dairy production facilities in the GS and WB by between 17% and 44% after participation in the VP. Also, (Hussein et al., 2014) have estimated the number of jobs that the VP have created in the participating stores of Jordan by 350 jobs. While (Bauer et al., 2014) indicated that the VP in Lebanon have contributed to 1300 new jobs in the participating shops. However, (Barca et al., 2015) mentioned that the CT impacts on local labor patterns were generally positive, but marginal.

Current volume of invested capital

Table No. (21) shows the current volume of invested capital in the study population.

Table 20: Current volume of invested capital

Current volume of invested capital *(Thousands USD)*	**Frequency**	**Percentage %**
Equal or less than 10	5	20.0
11 to 30	3	12.0
31 to 50	1	4.0
51 to 100	4	16.0
More than 100	12	48.0
Total	**25**	**100.0**

The result shows a high percentage of facilities with large invested capital; which indicates that despite the fact that most of the facilities of study population are of small sizes, they contain very expensive production lines, which increases the invested capital. A lot of the facilities of study population produce more than one product, some of which are redeemable through the VP and some are not which might be needing expensive

production lines which in turn increases the invested capital. The results are consistent with (Quffa, 2006) which showed that there is a continuous growth in the capital invested in food industries in the GS.

Period of participation in the voucher programme (longevity of engagement)

Table No. (22) shows the study population's longevity of engagement with the VP.

Table 21: Period of participating in the VP

Period	Frequency	Percentage
Equal or less than 1 year	3	12.0
from 1 to 3 years	16	64.0
from 3 to 6 years	6	24.0
Total	**25**	**100.0**

The period was divided into three groups according to the changes took place on the numbers of the VP's beneficiaries as mentioned in chapter two. The increase in the number of beneficiaries was followed by an increase in the volume of fund and to an increase in the number of participating shops accordingly. This clearly explains why 76% of the facilities have participated in the VP in the past three years which is in turn considered short period of time to make a big development.

It is quite interesting noting that at the beginning of the VP, the Israeli and imported products were redeemable through the voucher; the redemption rate of these products was dominant as locally-produced alternatives were not in the desired level, in the eyes of beneficiaries, to compete with the Israeli and imported products. After several studies and observations which showed quite improvements in the quality of local products, the WFP decided to ban all the Israeli products that have local alternatives to be redeemed through the voucher. This also explains the increase in the number of participating facilities in the past three years.

Descriptive analysis for other organizational traits

Table No. (24) shows that:

- Total number of products produced by the facility ranges from 1 to 15 with mean of 4.9, median of 4 and standard deviation equals 4.4; while the number of products being redeemed through voucher programme ranges from 1 to 6 with mean of 2.2, median 1 and standard deviation equals 1.5. This finding indicates that there is a high percentage of investment food facilities do as they produce a big number of products, some of which are not purchased through the programme.

- Number of shops covered by the food production facility before participating in the VP ranges from 2 to 500 with mean of 110.4, median of 80 and standard deviation equals 130.5; while the number of shops covered by the facility after participating in the voucher programme ranges from 7 to 10000 with mean of 242, median of 150.5 and standard deviation equals 279.9. This finding indicates that there is a big increase in the number of shops where the facilities' products from the study population is being marketed, which illustrate that the programme has given the opportunity for the producers to attract new customers and to reach new markets.

Table 22: Descriptive analysis for some variables

Variables	N	Min.	Max.	Mean	Median	Std. Deviation
Total number of products produced by the facility	25	1	15	4.9	4.0	4.4
Number of products being redeemed through the VP	25	1	6	2.2	1.0	1.5
Number of shops covered by the facility before participating in the VP	25	2	500	110.4	80.0	130.5
Number of shops covered by the facility after participating in the VP	25	7	1,000	242.0	150.5	279.9

Questions of the study

The main question of the study is:

To what extent does the WFP voucher programme contribute towards the development of the participating local food producers in the Gaza Strip?

To answer this main question we need to answer the following four sub-questions:

Question#1: To what extent does the WFP voucher programme contribute to the development of Quality of the participating local food producers?

Table (25) shows the Means and Test values for the field "The contribution of voucher programme to the Quality development:

Table 23: Means and Test values for "Quality development"

	Item	Mean	S.D	Proportional mean (%)	Test value	P-value (Sig.)	Rank
1.	Increasing the concern of improving the quality of products	6.92	2.31	69.20	1.99	0.029*	3
2.	Consulting specialists in the fields of nutrition and food processing	3.64	2.56	36.40	-4.60	0.000*	10
3.	Using raw materials of higher quality	6.28	2.72	62.80	0.52	0.305	6
4.	Testing the raw materials before production	6.72	2.81	67.20	1.28	0.106	4
5.	Improving the storage conditions of the raw materials	6.12	2.88	61.20	0.21	0.418	8
6.	Testing the products after production	6.20	2.83	62.00	0.35	0.363	7
7.	Improving the storage conditions of the products after production	6.72	2.82	67.20	1.28	0.107	4
8.	Improving the packaging and the final form of the products	7.88	2.70	78.80	3.48	0.001*	1
9.	Labeling the expiry date	7.60	2.71	76.00	2.95	0.003*	2
10.	Organization's attempt to apply a quality control system and to obtain quality certificates.	5.28	2.53	52.80	-1.43	0.083	9
	All paragraphs of the field	**6.34**	**1.81**	**63.36**	**0.93**	**0.181**	

* The mean is significantly different from 6

- The mean of paragraph #8 "*Improving the packaging and the final form of the products*" equals 7.88 (78.80%), Test-value = 3.48, and P-value = 0.001 which is smaller than the level of significance $\alpha = 0.05$. The sign of the test is positive, then the mean of this paragraph is significantly greater than the hypothesized value 6, which means that the respondents have agreed to this paragraph. *This indicates that the WFP VP has positively contributed to improving the quality of products through improving the packaging and final form of these products*.

- The mean of paragraph #9 "*Labeling the expiry date*" equals 7.60 (76.00%), Test-value = 2.95, and P-value = 0.003 which is smaller than the level of significance $\alpha = 0.05$. The sign of the test is positive, then the mean of this paragraph is significantly greater than the hypothesized value 6, which means that the respondents have agreed to this paragraph. *This indicates that the WFP VP has positively contributed to improving the quality of products through increasing the concern to the expiry date and labeling it on the products. As Labeling the expiry date is crucial and considered one of the three basic principles for controlling the food industries (Teibi, 1994).*

- The mean of paragraph #1 "*Increasing the concern of improving the quality of products*" equals 6.92 (69.20%), Test-value = 1.99, and P-value = 0.029 which is smaller than the level of significance $\alpha = 0.05$. The sign of the test is positive, then the mean of this paragraph is significantly greater than the hypothesized value 6, which means that the respondents have agreed to this paragraph. *This indicates that the WFP VP has a positive effect on the local producers by increasing their interest in improving the quality of their products. This is very important in the fact that most of the studies suggest that the quality of local food products remains poor*.

- The mean of paragraph #2 "*Consulting specialists in the fields of nutrition and food processing*" equals 3.64 (36.40%), Test-value = -4.60, and P-value = 0.000 which is smaller than the level of significance $\alpha = 0.05$. The sign of the test is negative, so the mean of this paragraph is significantly smaller than the hypothesized value 6. This concludes that the respondents have disagreed to this paragraph. *Which indicates that the VP has not encouraged the local producers to consult with specialists in the fields of nutrition and food processing in order to improve the quality of their products. This could be ascribed to the fact that most of the local food producers do not consult with nutrition specialists as mentioned by both (Quffa, 2006) and (Abu Rmeileh, 2011).*

- The mean of the field "***The contribution of WFP VP to the Quality development***" equals 6.34 (63.36%), Test-value = 0.93, and P-value=0.181 which is greater than the level of significance $\alpha = 0.05$. The mean of this field is insignificantly different from the hypothesized value 6. *This indicates that the respondents are not able to formulate a clear vision on the contribution of the WFP voucher programme to the quality development. In other words, the respondents have agreed with moderate degree to this field.*

The variation does not mean that the VP has not been effective, but its impact could have been greater if more attention was paid and more action were taken in order to get the local food industries with better quality.

The Focus Group Discussion (**FGD)** participants stressed that local producers pay great attention to increase the quality of their products. They mentioned that "*Many products, such as dairy products, olive oil, Zatar and Dogga, have witnessed marked improvement in the level of quality in terms of taste, hygiene, packaging, final form of products and labeling expiry date and barcode. This was not the case before joining the VP*".

Moreover, **FGD** participants underlined that the competition between the Gaza products among themselves and between them and the West Bank products are high; this leads the local producers to work as to find a way to improve their products' quality and to reduce the products' cost and the final price as well. Due to the fact that all the VP beneficiaries are poor and have very limited sources of income, they tend to buy products of low prices although their low quality, however, when the prices are similar, they choose based on quality.

"Although the continuous efforts and development; the WB products still have better quality than Gaza products" as mentioned by **FGD** participants. Also, in light of limited capacity, limited markets and high cost of raw materials, some local products have higher prices than WB or imported products.

Moreover, **FGD** participants said that local producers pay great attention to the feedback comes from the shop-owners regarding the level of acceptance of VP beneficiaries to their products and they take them into serious consideration in order not to lose their market share.

In light of these findings, it could be concluded that the contribution of the WFP VP to the quality development of the participating local food producers in the GS is considered positive and moderate. The contribution concentrates in increasing the producers' concern to the quality development, improving the products' packaging and final form, and labeling the expiry date. In addition, using raw materials with higher quality, testing them before production and improving their storage conditions, are considered positive indicators to this contribution. However, the VP has not been able to raise the awareness of the local food producers to apply a quality control mechanism or to consult with specialists in the fields of nutrition and food processing.

According to (Mountfield, 2012), some of the increased production in the dairy factories is attributed to a growing confidence in Palestinian products. The WFP VP was specifically associated with the trend: "*Having my product on a WFP list of approved products is like a stamp of quality*".

However, most of the studies suggest that the quality of locally produced products remains poor, According to (Al-Haj Mustafa, 2005) the Palestinian customer assumes at 71% that the imported products have better quality than the local products, which increases their demand for the imported products rather than the local products; that is because they care with a moderate degree about product quality regardless of its source. (Quffa, 2006) mentioned that the low quality of the local products had led to weak competitiveness against imported products, the vast majority of the food industries in Gaza Strip do not have quality control systems or quality certificates, they lack specialists in nutrition and food production and they do not test the raw materials before production. Moreover, (Abu Rmeileh, 2011) recommended that food producers should apply a quality control system or to have a quality certificate in order to achieve a competitive advantage for their products which would help them in marketing their products in the local and external markets. Also, (Qrinawi, 2006) suggested that improving the quality of local products is the first priority to compete with the imported products and to get the customer satisfaction as well. (Nasser, 2005) also recommended that improving the quality of products is very important for the development of local food producers in order to increase their market share and achieve a competitive advantage. And (Miqdad, 1999) indicated that it is important to improve the standard and the quality of the Palestinian products and to increase their competitiveness in the national and international markets.

Question#2: To what extent does the WFP voucher programme contribute towards the development of <u>Production</u> of the participating local food producers?

Table (26) shows the Means and Test values for the field "The contribution of voucher programme to the Production development:

Table 24: Means and Test values for "Production development"

	Item	Mean	S.D	Proportional mean (%)	Test value	P-value (Sig.)	Rank
1.	Developing clear plans to increase and develop the production.	6.52	2.33	65.20	1.12	0.138	1
2.	Increasing the volume of production	6.48	2.52	64.80	0.95	0.175	2
3.	Developing the production lines by adding new equipment and machines	5.32	2.41	53.20	-1.41	0.086	7
4.	Adding new production lines	5.25	3.04	52.50	-1.21	0.120	8
5.	Producing new products	4.20	3.25	42.00	-2.77	0.005*	11
6.	Expansion and increase in the investment	5.20	2.48	52.00	-1.61	0.060	9
7.	Expansion and adding new assets (Land, building, warehouse, …)	4.72	3.35	47.20	-1.91	0.034*	10
8.	Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	5.84	2.69	58.40	-0.30	0.384	5
9.	Increasing the utilization of production capacity through the optimum utilization of resources.	5.36	2.02	53.60	-1.59	0.063	6
10.	Increasing the supply channels of raw materials and dealing with more than one supplier	5.96	2.75	59.60	-0.07	0.471	4
11.	Developing an accurate and efficient inventory system that helps the effective functioning of the production process	6.00	2.14	60.00	0.00	0.500	3
	All paragraphs of the field	**5.53**	**1.82**	**55.29**	**-1.30**	**0.104**	

* The mean is significantly different from 6

- The mean of paragraph #1 "*Developing clear plans to increase and develop the production*" equals 6.52 (65.20%), Test-value = 1.12, and P-value = 0.138 which is greater than the level of significance $\alpha = 0.05$. This means that the mean of this paragraph is insignificantly different from the hypothesized value 6. *This indicates that the respondents are not able to decide whether the VP has encouraged them to develop clear plans for production development, although the mean value of this paragraph is considered moderate.*

- The means of paragraphs #5 "*Producing new products*" and #7 "*Expansion and adding new assets*" equal 4.20 (42.00%) and 4.72 (47.2%) respectively, Test-values equal -2.77 and -1.91, and P-values are 0.005 and 0.034 which are smaller than the level of significance $\alpha = 0.05$. The sign of the tests is negative, so the means of these paragraphs are significantly smaller than the hypothesized value 6. *This means that the respondents have disagreed to these paragraphs*.

- The mean of the field "***The contribution of WFP VP to the Production development***" equals 5.53 (55.29%), Test-value = -1.30, and P-value = 0.104 which is greater than the level of significance $\alpha = 0.05$. The mean of this field is insignificantly different from the hypothesized value 6. *This indicates that the respondents are not able to formulate a clear vision on the contribution of the WFP voucher programme to the production development; this refers to that most of the respondents perceive that the VP has low tangible contribution towards the facilities development in the fields of production planning, production volume, inventory systems and supply channels.*

In light of these findings, it could be concluded that there is a low contribution of the WFP VP to the production development of the participating local food producers in the GS. From the researcher perspective, this low contribution could be ascribed to many reasons, mainly to the overall context of Gaza including the political instability, prolonged closure, and recurrent conflicts; which decrease the producers' interest in increasing their production and importing new machinery and production lines which in turn makes the development process very slow. Also, production development is linked more to the volume of invested capital, and it needs more expenditures on machinery, production lines, technology and fixed assets. Moreover, the different economic activity practiced by the participating facilities and the different types of products they produce could be one of the main reasons for the differences between respondents' answers to this field.

This does not mean that the VP has not been effective in this field; results shows that dairy producers have agreed with a mean of 73.2% to all paragraphs of this field. In more details, they have agreed with 85.7% that the VP has urged them to produce new products which is considered a high percentage. Also, they have agreed with 80% that they increased the volume of production due to VP. They agreed with 75.7% that they have added new

production lines, increased their investment, and increased their supply channels due to the VP as well (see Annex 4 for more details). This was confirmed by the **FGD** participants who mentioned that many dairy products are being produced in Gaza thanks to the VP. Feta cheese is considered a clear example on the contribution of the VP to the production development of local daily producers; many producers added new production lines for Feta cheese and they are improving its taste and packaging in order to replace the imported Feta products. Other examples were mentioned during the **FGD** for dairy producers who started their businesses with one or two products and now they are producing more than five products thanks to participating in the VP.

Moreover, Tahina producers have agreed with 76.7% to the increase of production volume due to the VP. They also have agreed with 63.3% to improving the production efficiency and better utilizing the production capacity workers due to the VP. Cereals producers have agreed with 64% that VP has encouraged them to develop an accurate and efficient inventory system. Also, Dogga/Zaatar producers have agreed with 75% that VP has improved their production planning and production efficiency.

Furthermore, according to the **FGD** participants, many local producers have expanded their businesses and increased their investment after participating in the VP. Many of them, such as olive oil, dairy products, dogga/zaatar and WHFL producers, have increased their production volume based on the need resulted from the VP.

However, previous studies shows a positive contribution of the cash transfer programmes towards this field; according to (Creti, 2011), small-sized dairy factories in the Gaza Strip has doubled the volumes and values of production, and they attributed 80% of this change to the demand generated by vouchers, while medium-sized dairy factories experienced less than 25% increase of business, and this was only partly due to the vouchers. This result seems to be contradicting with the results of this field in our study; this could be true if the total population result was considered, however, when analyzing the inputs of this field according to the type of products, it will reveal a higher percentage of contribution. The dairy producers in this study have agreed with 80% percentage that the VP has led them to increase their volume of production and the mean of the production development field was 73.2% which is considered high.

In addition, (Husain et al., 2014) mentioned that the food voucher programme for the Syrian refugees in Jordan has led to some US$ 2.5 million investment in physical infrastructure of the participating retailers. Also, (Bauer et al., 2014) mentioned that the voucher programme in Lebanon has led to US$ 3 million investment in capital expenditures in the participating stores. While (Creti, 2010) indicated that medium scale farmers in Northern Uganda have invested the additional income resulted from the cash transfer project in productive assets and livelihoods' diversification which contributed to creating additional goods and production.

However, a number of studies shows that the production management situation in the local food producers needs more development; (Quffa, 2006) found that 83.9% of the facilities in the Gaza Strip have a clear production plan, the most important elements of these plans are to increase production volume, improve quality, and produce new varieties. But he indicated that the average monthly production volume does not reflect the optimal production volume, which means that there is a lack in utilization of production capacity. In the same context, (Abu Rmeileh, 2011) indicated that 75% of the food producers in Hebron have production plans that include producing new varieties, improving products' quality and increasing the production volume. She also attributed the reasons for lack of capacity utilization to the strong competition in the local market and the weak local demand, followed by the presence of Israeli obstacles on exportation, lack of raw materials and finally the lack of professional expertise. Also, (Qrinawi, 2006) mentioned that the vast majority of the food producers in the Gaza Strip are not operating at full production capacity, which would increase the costs and thus decrease the ability for competition. (Al-Burai, 2007) said that to a certain extent there is weakness in setting production plans for the food producers in the Gaza Strip, and their inventory systems are not highly qualified to meet the needs of the production process. Finally, (Al-Aghbar, 2007) considered that increasing the production volume, improving its quality and diversifying its products through increasing the invested capital and number of workers and increasing their productivity are considered the main factors that contribute to the development of the food industries.

Question#3: To what extent does the WFP voucher programme contribute towards the development of Human Resources of the participating local food producers?

Table (27) shows the Means and Test values for the field "The contribution of voucher programme to the Human Resources development:

Table 25: Means and Test values for "Human Resources development"

	Item	Mean	S.D	Proportional mean (%)	Test value	P-value (Sig.)	Rank
1.	Developing a plan for the management of human resources	5.08	2.48	50.80	-1.85	0.038*	2
2.	Hiring new workers	4.80	3.11	48.00	-1.93	0.033*	3
3.	Hiring specialists in the field of nutrition and food processing	4.28	3.10	42.80	-2.77	0.005*	5
4.	Improving the wages of workers	4.40	2.81	44.00	-2.84	0.004*	4
5.	Providing workers with incentives like transportation allowance, food meals, gifts, …etc	5.20	2.72	52.00	-1.47	0.077	1
6.	Improving the contracts of workers	4.16	2.94	41.60	-3.13	0.002*	6
7.	Providing workers with insurance including health insurance, insurance against accidents, fire, theft, ...	2.60	2.40	26.00	-7.09	0.000*	8
8.	Holding training programs for the workers	3.84	2.25	38.40	-4.80	0.000*	7
	All paragraphs of the field	**4.30**	**1.76**	**42.95**	**-4.84**	**0.000***	

* The mean is significantly different from 6

- The mean of the field "***The contribution of WFP VP to the Human Resources development***" equals 4.30 (42.95%), Test-value = -4.84, and P-value = 0.000 which is smaller than the level of significance $\alpha = 0.05$. The sign of the test is negative, so the mean of this field is significantly smaller than the hypothesized value 6. *This concludes that the respondents have disagreed to this field.*

In other words, respondents see that the WFP VP has small tangible contribution to the Human Resources development. The researcher might ascribe that to the weakness of the overall HR management in these facilities; most of these facilities are small to medium sized, the number of workers would be limited and may differ according to the type of products they produce. Moreover, current numbers of workers could be sufficient even if

the production increased, especially in light of the fact that the production capacity of those facilities are not being fully utilized. In addition, the limited number of workers reflects the tendency of these facilities to save costs; therefore producers would prefer to make workers work for overtime instead of hiring new ones. Also, the nature of sector as family business makes the employees in management levels work more than their capacities instead of hiring new employees in these levels in order to save costs. The same reason for the limited concern to increase wages or to provide incentives to the workers who may accept this situation due to the lack of work opportunities, especially amidst the difficult economic conditions experienced by the Palestinian economy and the high unemployment rates.

These results were confirmed by the **FGD** participants who mentioned that the HR development was limited to dairy producers and egg farms and especially hiring new workers.

However, this does not mean that the VP has not been effective in this field; results shows that dairy producers have agreed with 74.3% that they have hired new workers due to the VP. Also, they have agreed with 67.1% that the VP urged to improve the workers' wages. Moreover, Tahina producers have agreed with 70.0% to the improvement of workers' insurance due to the VP. They also have agreed with 63.3% that they are providing incentives to workers due to the VP. Both Dogga/Zaatar producers have agreed with 100.0% that they have improved the workers' contracts due to the VP (see Annex 4 for more details).

In the same context; previous studies showed a positive contribution of the cash transfer programmes towards specific areas of the human resources field. The study of (Al-Sahel, 2014) found that the total number of permanent jobs created in participating dairy processors since the baseline is 260 (24 in GS and 236 in WB). Moreover, the VP participating shops in the GS reported that 46 full-time jobs have been created within the participating shops in the GS since the beginning of the Programme, thereby increasing their work force size by 49.5%. Also, (Creti, 2011) mentioned that the three dairy factories sample in the GS hired an average of 3 employees per factory compared to 2.3 before the

beginning of the project. Each of the two small-sized factories was able to hire an additional salaried staff, while the medium-sized factory did not increase the number of employees. Furthermore, (Mountfield, 2012) indicated that additional jobs have been created in the dairy processing sector and probably in dairy farming and distribution. However, these seem to have been mainly an expansion of existing family capacity rather than new paid roles for people outside the family.

In the same context, (Bauer et al., 2014) mentioned that the voucher programme in Lebanon has created 1,300 jobs in the participating stores. And (Barca at al., 2015) mentioned that the impacts of cash transfer programmes in six countries in sub-Saharan Africa on local labour patterns were generally positive, but marginal.

However, a number of studies showed that the human resources situation in the local food producers needs more development; (Al-Burai, 2007) indicated that the level of HR competitive capability at food industries sector in the GS is generally satisfactory. However, it needs further improvements in the fields of training, insurance and incentives. Also, (Quffa, 2006) mentioned that there is a lack of training programmes for the workers of the food producers in the GS, despite the fact that it would increase the technical efficiency and productivity of those workers; and this demonstrates the poor performance in these facilities. He also believed that other incentives are offered on certain occasions like holidays or as determined by the owner of the facility himself. He also mentioned that the insurance provided by food producers are insufficient. (Abu Rmeileh, 2011) pointed out that most of food producers in Hebron have different types of insurance, especially the insurance against accidents at work.

However, (Qrinawi, 2006) mentioned that the number of workers in the food industries under study has decreased by 68.1% since the beginning of the second Intifada in 2000. This percentage indicates that the recruitment process itself is considered weak especially amidst the prevailed difficult economic conditions experienced by the Palestinian economy. He also mentioned that a large proportion of workers in these facilities are working on daily regimen, and therefore they do not feel job security inside these facilities.

Question#3: To what extent does the WFP voucher programme contribute towards the development of <u>Marketing Performance</u> of the participating local food producers?

Table (28) shows the Means and Test values for the field "The contribution of voucher programme to the Marketing Performance development:

Table 26: Means and Test values for "Marketing Performance development"

	Item	Mean	S.D	Proportional mean (%)	Test value	P-value (Sig.)	Rank
1.	Increasing the market share of the products	6.00	2.66	60.00	0.00	0.500	8
2.	Increasing the profitability	5.36	2.34	53.60	-1.37	0.092	10
3.	Expanding distribution channels to include new markets	6.04	2.37	60.40	0.08	0.467	6
4.	Improving the means of promotion and advertising	5.88	2.03	58.80	-0.30	0.385	9
5.	Attraction of new customers other than the voucher programme's beneficiaries	6.04	2.64	60.40	0.08	0.470	7
6.	Increasing the interest in customer satisfaction	7.84	1.93	78.40	4.77	0.000*	1
7.	Achieving a competitive advantage for products	7.52	1.71	75.20	4.44	0.000*	3
8.	Competing with the Israeli and imported products in the local market	6.76	2.67	67.60	1.43	0.083	5
9.	Improving the customers' mental image about the products	7.60	1.61	76.00	4.98	0.000*	2
10.	Producing products of different sizes to meet customer needs	7.08	2.47	70.80	2.19	0.019*	4
	All paragraphs of the field	**6.61**	**1.28**	**66.12**	**2.40**	**0.012***	

* The mean is significantly different from 6

- The mean of paragraph #6 "*Increasing the interest in customer satisfaction*" equals 7.84 (78.40%), Test-value = 4.77, and P-value = 0.000 which is smaller than the level of significance $\alpha = 0.05$. The sign of the test is positive, then the mean of this paragraph is significantly greater than the hypothesized value 6, which means that the respondents have agreed to this paragraph. *This indicates that the WFP VP has positively contributed to improving the marketing performance of the facilities of study population through increasing the interest in customer satisfaction.*

- The mean of paragraph #2 "*Increasing the profitability*" equals 5.36 (53.60%), Test-value = -1.37, and P-value = 0.092 which is greater than the level of significance α = 0.05. Then the mean of this paragraph is insignificantly different from the hypothesized value 6. *This indicates that the respondents are not able to decide whether their profitability was increased due to the VP or not.*

- The mean of the field "***The contribution of WFP VP to the Marketing Performance development***" equals 6.61 (66.12%), Test-value = 2.40, and P-value = 0.012 which is smaller than the level of significance α = 0.05. The sign of the test is positive, so the mean of this field is significantly greater than the hypothesized value 6, *which indicates that the respondents have agreed to this field. These findings reveals a positive contribution of the WFP VP to the Marketing Performance of the participating local food producers.*

In light of these findings, it could be concluded that the WFP VP has positively contributed to the development of Marketing Performance of the participating local food producers in the GS; the contribution concentrates mainly in increasing the concern towards customer satisfaction, improving the customers' mental image about local products, achieving a competitive advantage for products and producing products of different sizes to meet consumer needs. Also, there is a positive contribution towards competing with Israeli and imported products in the local market, reaching new markets and attracting new customers and increasing the market share of their products. However, the VP contribution in increasing the profitability of the facilities of these facilities was limited which could be attributed to the high costs of production and other running costs.

These findings were confirmed by the **FGD** participants who mentioned that local producers, and also importers of imported products, pay more attention to the VP participating shops through giving offers and following new methods of marketing in order to have their products existed in these shops.

Because of the VP, there has become a mutual trust between the local producers and the shop-owners; they give them the priority for delivering products in case of crossing closure and scarcity of raw materials.

"*The mental image of customers towards the locally produced products is changing to the better, this is mainly attributed to the VP*" as mentioned by most of the **FGD** participants.

Also, many customized products appeared in order to meet the customers' needs such as olive oil different sizes, WHFL small bags, and cheese and different dairy products; "*this is attributed mainly to the VP*" as indicated by the **FGD** participants as local producers pay great attention to the feedback comes from the shop-owners regarding the level of acceptance of VP beneficiaries to their products and they take them into serious consideration in order not to lose their market share.

In the same context, these findings are consistent with the study of (Al-Sahel, 2014) which indicated that participating dairy processors in both WB and GS have reported a 58% increase in their average monthly sales; this increase is attributed to several factors including increased market demand due to the VP, enhanced marketing and distribution strategies to participating and non-participating shops, increased production capacity, and introduction of new products. Also, (Creti, 2011) found that the profit of the dairy factories under his study comprised between 5% and 13.5%. He mentioned that the margin of profit has decreased in the past years because of the increased cost of packaging material and milk. Also, the factory owners forecast some long-term effects because new customers have become familiar with their products and will continue to purchase them.

While (Al-Burai, 2007) mentioned that the level of competitive capability of the food industries sector in Gaza was satisfactory regarding the marketing operations; however, it needs further enhancements by developing marketing systems and allocating more financial resources to this field. (Miqdad, 2004) suggested many factors that would improve the marketing performance of food industries facilities such is improving quality, reducing prices, improving the form and packaging and diversifying the means of advertising and promotion. However, (Quffa, 2006) and (Qrinawi, 2006) pointed out that most of the food producers in the GS are facing many problems in marketing their products, such as high costs, limited local market, competition with imported products and most important the Israeli restrictions imposed on exportation.

Summary of Study's Questions

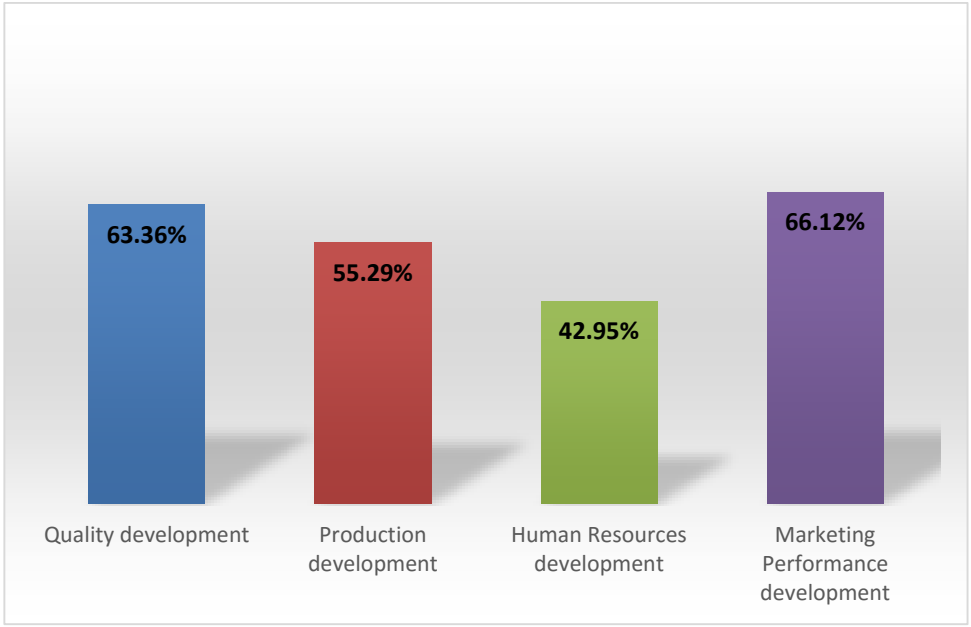
Table (29) shows the Means and Test values for the four fields of the study:

Table 27: Means and Test values for all fields

	Item	Mean	S.D	Proportional mean (%)	Test value	P-value (Sig.)	Rank
1.	**The contribution of VP to the Quality development**	6.34	1.81	63.36	0.93	0.181	2
2.	**The contribution of VP to the Production development**	5.53	1.82	55.29	-1.30	0.104	3
3.	**The contribution of VP to the Human Resources management development**	4.30	1.76	42.95	-4.84	0.000*	4
4.	**The contribution of VP to the Marketing Performance development**	6.61	1.28	66.12	2.40	0.012*	1
	All fields	**5.76**	**1.40**	**57.61**	**-0.85**	**0.201**	

* The mean is significantly different from 6

Figure 4: Means for all fields of the study



- The result of the field "**The contribution of WFP VP to the Quality development**" indicates that the respondents are not able to formulate a concrete answer to the first sub-question of the study regarding the contribution of the WFP VP to the quality development; it shows that the contribution is considered positive and moderate. The contribution concentrates in increasing the producers' concern to the quality development, improving the products' packaging and final form, and labeling the expiry date. In addition, using raw materials with higher quality, testing them before production and improving their storage conditions, are considered positive indicators to this contribution. However, the VP has not been able to raise the awareness of the local food producers to apply a quality control mechanism or to consult with specialists in the fields of nutrition and food processing.

  On the other hand, **FGD** participants indicated that local producers pay great attention to increase the quality of their products. They mentioned that "*Many products have witnessed marked improvement in the level of quality in terms of taste, hygiene, packaging, final form of products and labeling expiry date and barcode. This was not the case before joining the VP*".

- The result of the field "**The contribution of WFP VP to the Production development**" indicates that the respondents, also, are not able to formulate a concrete answer to the second sub-question of the study regarding the contribution of the WFP VP to the production development; most of the respondents perceive that the VP has relatively low tangible contribution to the food industries development in the fields of production planning, production volume, inventory systems and supply channels. From the researcher perspective, this low contribution could be ascribed to many reasons, mainly to the overall context of Gaza including the political instability, prolonged closure, and recurrent conflicts; which decrease the producers' interest in increasing their production and importing new machinery and production lines which in turn makes the development process very slow. Also, production development is linked more to the volume of invested capital, and it needs more expenditures on

machinery, production lines, technology and fixed assets. Moreover, the different economic activity practiced by the participating producers and the different types of products they produce could be one of the main reasons for the differences between respondents' answers to this field.

However, some indicators for production development due to VP appear that many dairy products are being produced in Gaza thanks to the VP as mentioned by the **FGD** participants. Feta cheese is considered a clear example on the contribution of the VP to the production development of local daily producers. Other examples were mentioned during the **FGD** for dairy producers who started their businesses with one or two products and now they are producing more than five products thanks to participating in the VP. Furthermore, many local producers have expanded their businesses and increased their investment after participating in the VP. Many of them, such as olive oil, dairy products, dogga/zaatar and WHFL producers, have increased their production volume based on the need resulted from the VP.

- The result of the field "**The contribution of WFP VP to the Human Resources development**" indicates that the respondents have disagreed to this field. In other words, respondents see that the WFP VP has small tangible contribution to the Human Resources development. This was also confirmed by the **FGD** participants. The researcher might ascribe that to the weakness of the overall HR management in these facilities; most of these facilities are small to medium sized, the number of workers would be limited and may differ according to the type of products they produce. Moreover, current numbers of workers could be sufficient even if the production increased, especially in light of the fact that the production capacity of those facilities are not being fully utilized. In addition, the limited number of workers reflects the tendency of these facilities to reduce the costs; the same reason for the limited concern to increase wages or to provide incentives to the workers who may accept this situation due to the lack of work opportunities, especially through the difficult economic conditions experienced by the Palestinian economy and the high unemployment rates.

- The result of the field "**The contribution of WFP VP to the Marketing Performance development**" indicates that the respondents have agreed that the WFP VP has positively contributed to the development of Marketing Performance of the participating local food producers in the GS; the contribution concentrates mainly in increasing the concern towards customer satisfaction, improving the customers' mental image about local products, achieving a competitive advantage for products and producing products of different sizes to meet consumer needs. Also, there is a positive contribution towards competing with Israeli and imported products in the local market, reaching new markets and attracting new customers and increasing the market share of their products. However, the VP contribution in increasing the profitability of the facilities of these facilities was limited which could be attributed to the high costs of production and other running costs.

  These findings were confirmed by the **FGD** participants who mentioned that local producers, and also importers of imported products, pay more attention to the VP participating shops through giving offers and following new methods of marketing in order to have their products existed in these shops.

  "*The mental image of customers towards the locally produced products is changing to the better, this is mainly attributed to the VP*" as mentioned by most of the **FGD** participants.

  Also, many customized products appeared in order to meet the customers' needs such as olive oil different sizes, WHFL small bags, and cheese and different dairy products; "*this is attributed mainly to the VP*" as indicated by the **FGD** participants as local producers pay great attention to the feedback comes from the shop-owners regarding the level of acceptance of VP beneficiaries to their products and they take them into serious consideration in order not to lose their market share.

Testing the Hypotheses

<u>First Hypothesis:</u> There is no significant differences among respondents toward the contribution of the WFP voucher programme to the development of participating local producers in Gaza Strip due to <u>Personal Traits</u> (Gender, Age, Years of experience, Education level, Position).

This hypothesis could be divided into the following sub-hypotheses:

1.1 There is no significant differences among respondents toward the contribution of the WFP VP in the development of participating local producers in Gaza Strip due to <u>gender</u>.

Table (30) shows that the p-value (Sig.) is greater than the level of significance α = 0.05 for each of the four fields, which indicates that there is insignificant difference among respondents toward each field due to gender. *This means that gender of respondents has no effect on their responses to these fields*.

Table 28: Independent Samples T-test of the fields and their p-values for Gender

	Field	Means		Test Value	Sig.
		Male	Female		
1.	The contribution of VP to the Quality development	6.15	7.73	-1.462	0.157
2.	The contribution of VP to the Production development	5.50	5.76	-0.227	0.822
3.	The contribution of VP to the Human Resources development	4.11	5.67	-1.472	0.155
4.	The contribution of VP to the Marketing Performance development	6.73	5.77	1.235	0.229
	All fields	**5.69**	**6.25**	**-0.635**	**0.531**

1.2 There is no significant differences among respondents toward the contribution of the WFP VP towards the development of participating local producers in Gaza Strip due to <u>age</u>.

Table (31) shows that the p-value (Sig.) is greater than the level of significance α = 0.05 for each of the four fields, then there is insignificant difference among respondents toward each field due to age. *We conclude that age of respondents has no effect on their responses to these fields. This might be ascribed to that all respondents are professional regardless their ages, and they are aware of all aspects of the management of their facilities.*

Table 29: ANOVA test of the fields and their p-values for Age

	Field	Means				Test Value	Sig.
		Equal or less than 30	31 to 40	41 to 50	51 to 60		
1.	The contribution of VP to the Quality development	5.30	7.03	6.88	5.23	1.824	0.174
2.	The contribution of VP to the Production development	4.62	5.63	6.16	4.93	0.971	0.425
3.	The contribution of VP to the Human Resources development	3.55	3.73	5.05	4.19	1.141	0.356
4.	The contribution of VP to the Marketing Performance development	6.10	6.33	6.90	6.95	0.594	0.626
	All fields	**4.95**	**5.78**	**6.31**	**5.37**	**1.201**	**0.334**

1.3 There is no significant differences among respondents toward the contribution of the WFP VP towards the development of participating local producers in Gaza Strip due to <u>years of experience</u>.

Table (32) shows that the p-value (Sig.) is greater than the level of significance α = 0.05 for each of the four fields, which means that there is insignificant difference among respondents toward each field due to their years of experience. *This indicates that that the respondents' years of experience have no effect on their responses to these fields.*

Table 30: ANOVA test of the fields and their p-values for Years of experience

	Field	Means					Test Value	Sig.
		Equal or less than 5	6 to 10	11 to 15	16 to 20	More than 20		
1.	The contribution of VP to the Quality development	5.93	6.78	6.59	5.37	6.28	0.338	0.849
2.	The contribution of VP to the Production development	5.21	5.41	6.38	4.23	5.47	0.765	0.561
3.	The contribution of VP to the Human Resources development	4.96	3.65	4.41	4.88	4.19	0.361	0.833
4.	The contribution of VP to the Marketing Performance development	6.07	6.32	7.49	6.07	6.43	1.253	0.321
	All fields	**5.56**	**5.63**	**6.31**	**5.13**	**5.66**	**0.415**	**0.796**

1.4 There is no significant differences among respondents toward the contribution of the WFP VP towards the development of participating local producers in Gaza Strip due to <u>education level</u>.

Table (33) shows that the p-value (Sig.) is greater than the level of significance α = 0.05 for each of the four fields, then there is insignificant difference among respondents toward each field due to their educational level. *This indicates that that the respondents' educational level has no effect on their responses to these fields.*

Table 31: ANOVA test of the fields and their p-values for Education level

	Field	Means				Test Value	Sig.
		Less than Secondary School	Secondary School	Bachelor	Post-graduate Studies		
1.	The contribution of VP to the Quality development	5.40	6.24	7.04	5.88	0.743	0.539
2.	The contribution of VP to the Production development	5.39	5.45	6.32	4.25	1.204	0.333
3.	The contribution of VP to the Human Resources development	4.50	4.39	4.61	3.28	0.516	0.676
4.	The contribution of VP to the Marketing Performance development	5.60	6.93	6.78	6.25	0.983	0.420
	All fields	**5.26**	**5.82**	**6.27**	**4.98**	**0.888**	**0.463**

1.5 There is no significant differences among respondents toward the contribution of the WFP VP towards the development of participating local producers in Gaza Strip due to <u>position</u>.

Table (34) shows that the p-value (Sig.) is greater than the level of significance α = 0.05 for each of the four fields, which indicates that there is insignificant difference among respondents toward each field due to their position. *This means that position of respondents has no effect on their responses to these fields, because they are aware of all aspects of the management of their facilities.*

Table 32: ANOVA test of the fields and their p-values for Position

	Field	Means				Test Value	Sig.
		Owner	Manager	Owner and Manager	Other		
1.	The contribution of VP to the Quality development	5.80	6.13	6.66	5.63	0.383	0.766
2.	The contribution of VP to the Production development	7.55	5.36	5.93	3.89	1.941	0.154
3.	The contribution of VP to the Human Resources development	5.75	4.35	4.45	3.31	0.649	0.593
4.	The contribution of VP to the Marketing Performance development	7.60	6.45	6.86	5.75	1.013	0.407
	All fields	**6.74**	**5.63**	**6.05**	**4.69**	**1.193**	**0.336**

Summary of First Hypothesis:

The above results indicate personal traits of the respondents have no effect on their responses towards the contribution of the WFP VP to the development of Quality, Production, Human Resources and Marketing Performance of the participating local food producers in the GS. This might be ascribed to the same economic conditions that food industries are operating in.

<u>Second Hypothesis:</u> There is no significant differences among respondents toward the contribution of the WFP voucher programme to the development of the participating local producers in Gaza Strip due to <u>Organization Traits</u> (Years of operation, Geographic Location, Legal form, Current number of workers, Number of workers before VP, Current volume of invested capital, Period of participating in the VP, Type of products).

This hypothesis can be divided into the following sub-hypotheses:

2.1 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the participating local producers in Gaza Strip due to <u>Years of operation</u>.

Table (35) shows that the p-value (Sig.) is smaller than the level of significance α = 0.05 for the field of *Human Resources development*, which means that there is significant difference among the respondents toward this field due to years of operation. *This indicates that years of operation of the facility have an effect on the respondents' responses to this field. The contribution of the VP towards the Human Resources development was the highest in the facilities with the least years of operation. This seems to be normal in the fact that these facilities still fresh and would exert more efforts in the HR management.*

For the other three fields, the p-value (Sig.) is greater than the level of significance α = 0.05, then there is insignificant difference among the respondents toward these fields due to years of operation. *This indicates that years of operation of the facility have no effect on the respondents' responses to these fields.*

Table 33: ANOVA test of the fields and their p-values for Years of operation

	Field	Means					Test Value	Sig.
		Equal or less than 5	6 to 10	11 to 15	16 to 20	More than 20		
1.	The contribution of VP to the Quality development	7.40	6.45	6.53	5.80	4.70	1.979	0.137
2.	The contribution of VP to the Production development	6.08	5.55	6.16	5.09	4.04	1.307	0.301
3.	The contribution of VP to the Human Resources development	5.45	3.41	4.68	5.19	2.50	3.595	0.023*
4.	The contribution of VP to the Marketing Performance development	6.80	6.43	7.33	6.30	5.62	1.514	0.236
	All fields	**6.48**	**5.56**	**6.25**	**5.60**	**4.30**	**2.640**	**0.064**

* The mean difference is significant a 0.05 level

2.2 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the participating local producers in Gaza Strip due to <u>Geographic location of the facility</u>.

Table (36) shows that the p-value (Sig.) is greater than the level of significance α = 0.05 for each of the four fields, which indicates that there is insignificant difference among respondents toward each field due to the geographic location of the facility. *This means that the geographic location of the facility has no effect on the responses to these fields*.

This might be because the area of the GS is very small and have the same nature among its five governorates, and the costs for transportation between them is considered low.

Table 34: ANOVA test of the fields and their p-values for Geographic Location

	Field	Means				Test Value	Sig.
		North Gaza	Gaza	Middle	Khan Younis		
1.	The contribution of VP to the Quality development	6.97	5.33	7.30	7.90	2.556	0.083
2.	The contribution of VP to the Production development	5.92	4.67	6.73	6.64	1.823	0.174
3.	The contribution of VP to the Human Resources development	4.17	3.75	5.31	7.38	2.075	0.134
4.	The contribution of VP to the Marketing Performance development	6.86	6.06	7.60	6.50	1.730	0.191
	All fields	**6.07**	**5.01**	**6.81**	**7.08**	**2.741**	**0.069**

2.3 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the participating local producers in Gaza Strip due to <u>Legal form of the facility</u>.

Table (37) shows that the p-value (Sig.) is greater than the level of significance $\alpha = 0.05$ for each of the four fields, then there is insignificant difference among respondents toward each field due to the legal form of the facility. *This means that the legal form of the facility has no effect on the responses to these fields.*

Table 35: ANOVA test of the fields and their p-values for Legal form

	Field	Means				Test Value	Sig.
		Individual	Partnership	Private shareholding	Cooperative		
1.	The contribution of VP to the Quality development	6.58	6.90	5.90	8.01	0.669	0.620
2.	The contribution of VP to the Production development	6.21	5.25	4.71	6.08	0.961	0.446
3.	The contribution of VP to the Human Resources development	4.34	4.63	4.03	5.28	0.127	0.971
4.	The contribution of VP to the Marketing Performance development	6.52	6.55	6.88	5.58	0.237	0.915
	All fields	**6.00**	**5.89**	**5.43**	**6.28**	**0.275**	**0.891**

2.4 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the participating local producers in Gaza Strip due to <u>Current number of workers</u>.

Table (38) shows that the p-value (Sig.) is smaller than the level of significance α = 0.05 for the field of Human Resources development, which means that there is significant difference among the respondents toward this field due to current number of workers of the facility. *This indicates that current number of workers of the facility has an effect on the respondents' responses to this field.*

For the other three fields, the p-value (Sig.) is greater than the level of significance α = 0.05, then there is insignificant difference among the respondents toward these fields due to current number of workers of the facility. *This indicates that current number of workers of the facility has no effect on the respondents' responses to these fields.*

However, the table tells that the contribution of the VP to the four field of the study was the highest among the facilities with current number of workers from 6 to 10.

Table 36: ANOVA test of the fields and their p-values for Current number of workers

	Field	Means					Test Value	Sig.
		Equal or less than 5	6 to 10	11 to 15	16 to 20	More than 20		
1.	The contribution of VP to the Quality development	6.59	7.68	5.88	5.50	5.52	0.996	0.433
2.	The contribution of VP to the Production development	5.26	7.27	5.77	4.50	4.53	1.600	0.213
3.	The contribution of VP to the Human Resources development	3.58	6.69	4.04	5.00	3.83	3.265	0.033*
4.	The contribution of VP to the Marketing Performance development	6.23	7.08	6.70	5.90	6.96	0.461	0.763
	All fields	**5.51**	**7.21**	**5.68**	**5.24**	**5.26**	**1.443**	**0.257**

* The mean difference is significant a 0.05 level

2.5 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the participating local producers in Gaza Strip due to <u>number of workers before participating in the VP</u>.

Table (39) shows that the p-value (Sig.) is smaller than the level of significance α = 0.05 for the field of Production development, which means that there is significant difference among the respondents toward this field due to number of workers before the VP. *This indicates that number of workers before the VP has an effect on the respondents' responses to this field.*

For the other three fields, the p-value (Sig.) is greater than the level of significance α = 0.05, then there is insignificant difference among the respondents toward these fields due to number of workers before the VP. *This indicates that number of workers before the VP has no effect on the respondents' responses to these fields.*

However, the table tells that the contribution of the VP to the four field of the study was the highest among the facilities with number of workers before VP equals or less than 5 workers.

Table 37: ANOVA test of the fields and their p-values for Number of workers before VP

	Field	Means				Test Value	Sig.
		Equal or less than 5	6 to 10	11 to 20	More than 30		
1.	The contribution of VP to the Quality development	6.75	6.32	6.26	3.85	1.613	0.216
2.	The contribution of VP to the Production development	6.03	5.42	5.68	2.18	3.378	0.037*
3.	The contribution of VP to the Human Resources development	4.83	4.08	3.40	3.63	0.940	0.439
4.	The contribution of VP to the Marketing Performance development	6.57	6.84	6.62	6.30	0.087	0.967
	All fields	6.11	5.74	5.61	3.96	1.476	0.250

* The mean difference is significant a 0.05 level

2.6 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the participating local producers in Gaza Strip due to <u>Current volume of invested capital</u>.

Table (40) shows that the p-value (Sig.) is smaller than the level of significance α = 0.05 for the field of Human Resources development, which means that there is significant difference among the respondents toward this field due to current volume of invested capital. *This indicates that current volume of invested capital has an effect on the respondents' responses to this field.*

For the other three fields, the p-value (Sig.) is greater than the level of significance α = 0.05, then there is insignificant difference among the respondents toward these fields due to current volume of invested capital. *This indicates that current volume of invested capital has no effect on the respondents' responses to these fields.*

However, the table tells that the contribution of the VP to the four field of the study was the highest among the facilities with current volume of invested capital between 51 to 100 thousands USD.

Table 38: ANOVA test of the fields and their p-values for Current volume of invested capital

	Field	Means					Test Value	Sig.
		Equal or less than 10	11 to 30	31 to 50	51 to 100	More than 100		
1.	The contribution of VP to the Quality development	7.84	6.20	3.30	6.88	5.82	2.344	0.090
2.	The contribution of VP to the Production development	5.71	4.64	3.36	7.00	5.37	1.284	0.309
3.	The contribution of VP to the Human Resources development	4.20	2.17	2.13	5.78	4.55	3.004	0.043*
4.	The contribution of VP to the Marketing Performance development	6.10	5.50	4.50	7.30	7.05	2.685	0.061
	All fields	**6.05**	**4.75**	**3.38**	**6.79**	**5.75**	**2.003**	**0.133**

* The mean difference is significant a 0.05 level

2.7 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the participating local producers in Gaza Strip due to <u>Period of participating in the VP</u>.

Table (41) shows that the p-value (Sig.) is greater than the level of significance $\alpha = 0.05$ for each of the four fields, then there is insignificant difference among respondents toward each field due to the period of participation in the VP. *This means that the period of participation in the VP has no effect on the responses to these fields.*

This *might be attributed to that the period of the VP is considered small, and alike the difference between the three categories. However, the means of the third category "from 3 to 6 years" seems to be the highest comparing to those of other categories; this might indicate that the higher the longevity of engagement is, the higher contribution could be.*

Table 39: ANOVA test of the fields and their p-values for Period of participating in the VP

	Field	Means			Test Value	Sig.
		Equal or less than 1 Year	1 to 3	3 to 6		
1.	The contribution of VP to the Quality development	4.47	6.56	6.68	1.988	0.161
2.	The contribution of VP to the Production development	3.97	5.61	6.11	1.476	0.250
3.	The contribution of VP to the Human Resources development	3.67	4.20	4.88	0.520	0.602
4.	The contribution of VP to the Marketing Performance development	5.70	6.57	7.18	1.423	0.262
	All fields	**4.48**	**5.81**	**6.28**	**1.797**	**0.189**

2.8 There is no significant differences among respondents toward the contribution of the WFP VP to the development of the <u>Type of products</u> produced by the facility and being redeemed through VP.

Assessing table (42) tells that the p-value (Sig.) is smaller than the level of significance $\alpha = 0.05$ for the field of *Production development* and *Marketing Performance development*; which means that there is significant difference among the respondents toward these fields due to the type of products produced by the facility and being redeemed through the VP. *This indicates that type of product has an effect on the respondents' responses to these fields.*

<u>Generally</u>, p-value (Sig.) equals the level of significance $\alpha = 0.05$ for the total analysis; which means that there is significant difference among the respondents toward the contribution of the VP towards the development of the participating local food producers due to the type of products produced by these facilities and being redeemed through the VP. *This indicates that type of product has an effect on the respondents' responses to the contribution of WFP VP to the development of local food producers.*

Table 40: ANOVA test of the fields and their p-values for Type of products

	Field	Means						Test Value	Sig.
		Dairy	Olive Oil	Wheat Flour	Cereals	Tahina	Zaatar/Doqa		
1.	The contribution of VP to the Quality development	7.11	3.30	5.25	6.61	5.37	6.30	1.251	0.325
2.	The contribution of VP to the Production development	7.32	3.36	3.55	4.80	5.70	5.68	3.966	0.012*
3.	The contribution of VP to the Human Resources development	5.39	2.13	4.19	3.58	5.00	4.19	1.381	0.275
4.	The contribution of VP to the Marketing Performance development	7.60	4.50	6.65	5.83	6.73	7.90	4.297	0.009*
	All field of the questionnaire	**6.95**	**3.38**	**4.91**	**5.28**	**5.74**	**6.10**	**2.704**	**0.050***

* The mean difference is significant a 0.05 level

Results show that the dairy producers have reported the highest degree of contribution among other facilities of the other types pf products with mean equals 6.95 (69.50%) followed by Zaatar/Doga producers with mean of 6.10 (61.00%), then Tahina (57.40%), Cereals (52.80%), Wheat Flour (49.10%) and finally Olive Oil (33.80%). (see Annex 4 for more details)

These results are clearly attributed to the fact that the redemption rate of products participating on the VP differs from one type to the others. According to the VP monitoring database, dairy products represents the highest percentage of the total commodities exchanged through vouchers. This means that dairy producers are the ones with the highest percentage of sales, which makes the result of this analysis clear and logic.

Summary of Second Hypothesis:

The above results indicate that organizational traits of the participating local food producers in the GS have limited effect on the level of contribution of the WFP VP to the development of Quality, Production, Human Resources and Marketing Performance. This might be ascribed to many reasons such as operating in the same economic conditions and the open-market policy that WFP uses to choose the products to be enrolled in the VP list which implies standing on the same distance from all producers.

Only the types of products that these facilities produce have a statistically-significant effect on the level of contribution they get from participating in the VP. This is clearly understood amidst the fact that the redemption rate of each type of products differs from one type to another which in turn increases the probability and opportunity to have a higher level of development among facilities with higher redemption rates.

CHAPTER SIX
CONCLUSION AND RECOMMENDATIONS

Conclusion

The WFP VP aims at meeting food needs and improving dietary diversity amongst the non-refugee food insecure population in Palestine by supporting beneficiary households to procure a specific part of their dietary requirement through existing market mechanisms. The WFP VP uses a network of local shops as procurement and distribution mechanisms, ensuring cash is directly injected into the local economy at the micro level. This is designed to have a positive secondary economic impact on local production, employment and small businesses. (Al-Sahel, 2014)

Through the collection of primary data from participating local producers, and the input of FGD participants; this chapter summarizes the contribution of WFP VP to the development of the participating local food producers in the GS at the levels of Quality, Production, Human Resources, and Marketing Performance.

Quality development

The study showed that the contribution of the WFP VP to the quality development of the participating local food producers in the GS is considered positive and moderate. Analyzing the results showed the following:

1. WFP VP has a distinguished role in increasing the interest of local producers in improving the quality of their products. This is very important in the fact that most of the studies suggest that the quality of local food products remains poor. It is important for a business to continually improve the quality of the products it has to offer. It is quite important noting that quality can affect the performance of the business overall; it is important for a business to continually improve the quality of the products it has to offer. Quality can give the business a competitive edge and can help in keeping and gaining more customers which in turn contributes to the overall business development.

2. WFP VP has a positive contribution in improving the packaging and final form of the products. Effective packaging is one of the crucial elements of a product's successful lifecycle, it adds value and ensures reliable quality, safety and functionality of the products.

3. WFP VP has positively contributed to increasing the concern of participating food industries to the importance of expiry date and labeling it on the products. This contribution is very important knowing that labelling is one way in which consumers can get knowledge about the food they consider buying and its safety.

4. There are some positive indicators on the WFP VP contribution to the quality development; it urged the producers, to some extent, to use raw materials with higher quality, to test them before production and to improve the raw materials storage conditions. It also contributed to improving the storage conditions of the products and testing them after production.

5. WFP VP has not encouraged the local producers to consult with specialists in the fields of nutrition and food processing and also it has not raised their concern to apply a quality control mechanism in their businesses. These fields need improvement in order to get the local food industries with better quality.

Production development

The study showed a low contribution of the WFP VP to the production development of the participating local food producers in the GS. Analyzing the results showed the following:

1. To some extent, the WFP VP has positively contributed to improving the production planning in the participating food industries. It also contributed to increasing the production volume and developing an efficient inventory system in these facilities.

2. WFP VP has a low contribution to the fields of increasing the supply channels of raw materials, improving the production efficiency, utilization of production capacity, developing the production lines, and increasing the capital investment.

3. The overall results showed a very limited contribution of WFP VP to the fields of Producing new products and Expansion and adding new assets.

4. Dairy producers have agreed with a high percentage that WFP VP has a positive contribution to the production development in their facilities. Tahina and Dogga/Zaatar producers have agreed on this contribution but with lower level. While Olive Oil and WHFL producers showed a very small contribution to the production development of their businesses.

Human Resources development

The study showed a small tangible contribution of WFP VP to the Human Resources development of the participating local food producers in the GS with a mean of 42.95%. Analyzing the results showed the following:

1. Generally, respondents and FGD participants see that the WFP VP has small tangible contribution to the Human Resources development of their businesses. This might be ascribed to the weakness of the overall HR management in these businesses.

2. Despite the limited role the WFP VP has played in the HR development, results showed that Dairy producers have hired new workers due to the VP. Also, the VP urged them to improve the workers' wages. Moreover, Tahina producers improved their workers' insurance due to the VP. They also are providing incentives to workers due to the VP. Both Dogga/Zaatar producers have totally agreed that they have improved the workers' contracts due to the VP.

Marketing Performance development

The study showed a positive contribution of the WFP VP to the production development of the participating local food producers in the GS. Analyzing the results showed the following:

1. WFP VP has an intelligible positive impact in increasing the interest of local producers in customer satisfaction. Customer satisfaction is a leading indicator of consumer loyalty; it is a point of differentiation in a competitive marketplace where businesses compete for customers.

2. WFP VP has also a good positive contribution in improving the customers' mental image about local products, achieving a competitive advantage for products and producing products of different sizes to meet consumer needs.

3. Also, there is a positive contribution towards competing with Israeli and imported products in the local market, reaching new markets and attracting new customers and increasing the market share of their products.

4. WFP VP contribution in increasing the profitability of the facilities of these facilities was limited which could be attributed to the high costs of production and other running costs.

Effect of products' types

1. The results of the study show that type of products under the VP has a significant effect on the respondents' opinions regarding the contribution of the WFP VP towards the development of local food producers in the Gaza Strip. It mainly affects the fields of Production development and Marketing Performance development.

2. Results show that the dairy producers have reported the highest degree of contribution among other facilities of the other types pf products with mean equals 6.95 (69.50%) followed by Zaatar/Doga producers with mean of 6.10 (61.00%), then Tahina (57.40%), Cereals (52.80%), Wheat Flour (49.10%) and finally Olive Oil (33.80%).

3. These results are clearly attributed to the fact that the redemption rate of products participating on the VP differs from one type to the others. According to the VP monitoring database, dairy products represents the highest percentage of the total commodities exchanged through vouchers. This means that dairy producers are the ones with the highest percentage of sales, which makes the result of this analysis clear and logic.

Hypothesis

1. The results indicated that personal traits of the respondents have no effect on their responses towards the contribution of the WFP VP to the development of Quality, Production, Human Resources Management and Marketing Performance of the participating local food producers in the GS.

2. Results also indicated that organizational traits of the participating local food producers in the GS have small limited effect on the level of contribution of the WFP VP to the development of Quality, Production, Human Resources Management and Marketing Performance.

3. These findings might be ascribed to many reasons such as operating in the same economic conditions and the open-market policy that WFP uses to choose the products to be enrolled in the VP list which implies standing on the same distance from all producers.

4. Only the types of products that these facilities produce have a statistically-significant effect on the level of development they get from participating in the VP. This is clearly understood amidst the fact that the redemption rate of each type of products differs from one type to another which in turn increases the probability and opportunity to have a higher level of development among facilities with higher redemption rate.

Recommendations

In view of the study's results, analysis, and conclusion; a set of recommendations were formulated, which, if implemented, would hopefully maximize the potential impact of the WFP voucher programme on the local food industries in order to achieve a comprehensive and sustainable development in the Palestinian local economy.

Recommendations for the World Food Programme

1. Considering the overall positive impact of the Voucher Programme on both the beneficiary HHs and the local economy, and based on the demonstrated level of contribution to the development of local food producers in the GS; this study recommends WFP to increase the scale of the VP and to further promote the VP in its operation in Palestine. Expansion of the VP comes from a committed multi-year funding and transitioning more in-kind assistance to voucher. Also, it is recommended that WFP demonstrates the direct and indirect impacts of the VP to the potential donors in order to continue having funds required for the sustainability of the VP.

2. WFP is encouraged to expand the network of shops to include more shops in different areas of the GS; this would allow the local producers to reach new markets and to attract new customers which in turn would maximize the economic impact of the VP.

3. It is highly recommended to limit the redemption of some other imported items, especially those with low nutritious value such as the Vegetable Oil, given their high current redemption rates. This would increase the value spent on other local products and in turn would maximize the impact of the VP on local economy.

4. WFP is encouraged to minimize uncertainty whenever possible. It will be important for all actors of the market chain, including retailers and food producers, to be informed in advance of any changes in the voucher transfer amounts and caseloads or any possible pipeline breaks. Those actors would make capital investments that need to be recouped over years. Ensuring a stable, predicable and transparent environment for

them will allow them to continue providing the VP beneficiaries with quality goods at competitive prices, and continue investing as required.

5. WFP to promote dialogue with the private sector in order to increase participation of and linkages between retailers and local producers.

Recommendations for the local food producers

1. ***Improving the Quality***: This recommendation is of great importance and has a top priority. Safety of food take a growing interest in the world, and there is a great need to provide stronger guarantees about the safety and quality of food products for the consumers. Matching international food standards is a basic requirement to gain a larger share in international markets.

   This requires the food producers to take several actions to get the local production with higher quality, these actions include selecting raw materials with higher quality, matching the specification and standards, hiring or consulting specialists in nutrition and food production, considering hygiene, improving storage conditions, improving products' taste and appearance, improving the form and packaging, improving labeling and validity date. They might also include applying quality control system and obtaining quality certificates which facilitate access to local, regional, and international markets.

2. ***Production***: Improving the quality of products requires more investment in machinery and new technologies. Food Producers need to work on improving the production efficiency through the development of manufacturing methods and using new technologies. They need also to best utilize the production capacity through the optimum utilization of resources and energy. In spite of the financial burden that this investment requires, however it will affect the industries on the long run through the reduction in production costs and improving the level of quality which will increase the sales and profitability as well.

3. ***Human Resources Management:*** These assets, working hands, need to have more concern from the food producers. Training is essential in order to maximize the utilization of production capacity and energy and to reduce incidents. Also, they need to pay more attention and have more consideration to the concepts of human enthusiasm and job satisfaction which could be achieved by incentives, motivations and rewards.

4. ***Improving Marketing and Promotion:*** In light of the strong competition faced by local products by both local and imported products; it is important for the food producers to exert more efforts on marketing their products through advertising and other means of promotion, and to have the competitive advantage that will definitely contribute to increasing the customers' loyalty.

   Food producers need to work on achieving customer satisfaction through improving the quality, packaging, and taste of the products. Customers' needs could be identified through field surveys and feedback from both retailers and customers themselves which could be used for the continuous improvement of the products.

Recommendations for the local authorities

1. Stability is essential for any economic development. Maximizing the multiplier effect of the VP requires complementary interventions from both governmental and non-governmental entities. It needs a high level of intervention and support from government and public sector in term of importing raw materials, machinery, and exportation of final products. All these factors coupled with a strategic foreign donations for the support of industrial sector, should be integrated in order to cause a great influence.

2. It is essential to develop a Palestinian comprehensive development plan in order to set the priorities for the development of local economy. The reconstruction of the Palestinian economy in general and that of Gaza in particular requires not only substantial foreign aid but also renewed development efforts through investing in productive sectors and crucial infrastructure so that the productive base is rebuilt.

3. To provide a suitable and attractive environment for investment by ensuring security and stability, providing legal guarantees for the investors, formulating economic laws to encourage investors to invest in the food industrial sector, and protecting the local product.

4. Rehabilitation of existing industrial zones to be commensurate with the nature of food industries and their requirements in terms of cleanliness and infrastructure.

5. Enhance the competitiveness of local food products through development of the Palestinian specifications and standards, and to continue keeping them harmonized with international standards.

Suggestions for further studies in the future

1. Given the roll-out of the new e-voucher system in 2015; it is highly recommended to conduct a study that provide a numerical analysis for the impact of the WFP VP on local economy and the multiplier effect of the WFP VP on each sub-sector of the food industrial sector, given that the new system can provide much accurate data for the redemption of each brand being redeemed through the VP.

2. It is also highly recommended to conduct a similar study to assess the contribution of the VP to the food producers of each food sub-sector involved in the VB in the West Bank, in order to get an overall overview on the impact of the VP to the whole Palestinian food industrial sector.

3. It is recommended to conduct a comprehensive impact study that takes the full value chain of each food sub-sector involved in the VP, starting from the retailer to distributers to food producers and ending up with the suppliers of raw materials.

4. Another recommendation to conduct a future study to assess the economic impact of the VP on Egg supply chain given the high redemption rate of this important item in the VP.

5. To conduct a comprehensive study to assess the economic impact of the VP on the traders and importers that provide imported food items being redeemed through the VP.

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ANNEX 1:

QUESTIONNAIRE IN ENGLISH VERSION

Section 1: Personal Information:

1. Gender: ☐ Male ☐ Female

2. Age:

   ☐ Equal or less than 30 ☐ 31 to 40 ☐ 41 to 50 ☐ 51 to 60 ☐ More than 60

3. Years of Experience:

   ☐ Equal or less than 5 ☐ 6 to 10 ☐ 11 to 15 ☐ 16 to 20 ☐ More than 20

4. Education level:

   ☐ Less than Secondary School ☐ Secondary School ☐ Bachelor ☐ Post-graduate Studies

5. Position:

   ☐ Owner ☐ Manager ☐ Owner and Manager ☐ Other ……

Section 2: Organization Information:

6. Years of operation:

   ☐ Equal or less than 5 ☐ 6 to 10 ☐ 11 to 15 ☐ 16 to 20 ☐ More than 20

7. Geographic location of the establishment:

   ☐ North Gaza ☐ Gaza ☐ Middle ☐ Khan Younis ☐ Rafah

8. Legal form of the establishment:

   ☐ Individual ☐ Partnership ☐ Private shareholding ☐ Public shareholding ☐ Cooperative

9. Type of products produced by the establishment and being redeemed through voucher programme:

   ☐ Dairy ☐ Olive Oil ☐ Wheat Flour ☐ Cereals ☐ Tahina ☐ Zaatar/Doqa

10. Current number of workers:

    ☐ Equal or less than 5 ☐ 6 to 10 ☐ 11 to 15 ☐ 16 to 20 ☐ More than 20

11. Number of workers before participating in the voucher programme:

    ☐ Equal or less than 5 ☐ 6 to 10 ☐ 11 to 15 ☐ 16 to 20 ☐ More than 20

12. Current volume of invested capital (Thousands USD):

☐ Equal or less than 10 ☐ 11 to 30 ☐ 31 to 50 ☐ 51 to 100 ☐ More than 100

13. Period of participating in the voucher programme:

☐ Equal or less than 1 Year ☐ from 1 to 3 years ☐ from 3 to 6 years

14. Total number of products produced by the establishment: ……

15. Number of products being redeemed through voucher programme: ……

16. Number of shops covered by the establishment before participating in the voucher programme: …..…

17. Number of shops covered by the establishment after participating in the voucher programme: ……

Section 3: The contribution of voucher programme to the development of establishment

Please determine the degree of your agreement in each of the four parts of the contribution of the voucher programme to the development of the establishment according to the scale from 1 to 10, so that 1 represents the lowest degree of agreement, and 10 represents the highest degree of agreement.

Part 1: The contribution of voucher programme to the Quality development:		
Inclusion of the establishment's products in the voucher programme contributed to:		**1-10**
1	Increasing the concern of improving the quality of products	
2	Consulting specialists in the fields of nutrition and food processing	
3	Using raw materials of higher quality	
4	Testing the raw materials before production	
5	Improving the storage conditions of the raw materials	
6	Testing the products after production	
7	Improving the storage conditions of the products after production	
8	Improving the packaging and the final form of the products	
9	Labeling the expiry date	
10	Organization's attempt to apply a quality control system and to obtain quality certificates.	

Part 2: The contribution of voucher programme to the Production development:		
Inclusion of the establishment's products in the voucher programme contributed to:		**1-10**
11	Developing clear plans to increase and develop the production.	
12	Increasing the volume of production	
13	Developing the production lines by adding new equipment and machines	
14	Adding new production lines	
15	Producing new products	
16	Expansion and increase in the investment	
17	Expansion and adding new assets (Land, building, warehouse, …)	
18	Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	
19	Increasing the utilization of production capacity through the optimum utilization of resources.	
20	Increasing the supply channels of raw materials and dealing with more than one supplier	
21	Developing an accurate and efficient inventory system that helps the effective functioning of the production process	

Part 3: The contribution of voucher programme to the Human Resources development:		
Inclusion of the establishment's products in the voucher programme contributed to:		**1-10**
22	Developing a plan for the management of human resources	
23	Hiring new workers	
24	Hiring specialists in the field of nutrition and food processing	
25	Improving the wages of workers	
26	Providing workers with incentives like transportation allowance, food meals, gifts, … etc	
27	Improving the contracts of workers	
28	Providing workers with insurance including health insurance, insurance against accidents, fire, theft, … etc	
29	Holding training programs for the workers	

Part 4: The contribution of voucher programme to the Marketing Performance development:		
Inclusion of the establishment's products in the voucher programme contributed to:		**1-10**
30	Increasing the market share of the products	
31	Increasing the profitability	
32	Expanding distribution channels to include new markets	
33	Improving the means of promotion and advertising	
34	Attraction of new customers other than the voucher programmes's beneficiaries	
35	Increasing the interest in customer satisfaction	
36	Achieving a competitive advantage for products	
37	Competing with the Israeli and imported products in the local market	
38	Improving the customers' mental image about the products	
39	Producing products of different sizes to meet consumer needs	

ANNEX 2:
QUESTIONNAIRE IN ARABIC VERSION

الجامعة الإسلامية – غزة

عمادة الدراسات العليا

كلية التجارة

قسم إدارة الأعمال

استبانة

لقياس مدى مساهمة برنامج القسائم الشرائية التابع لبرنامج الأغذية العالمي في تطوير الصناعات الغذائية المحلية المشاركة في قطاع غزة

تهدف هذه الاستبانة إلى التعرف على مدى مساهمة برنامج القسائم الشرائية التابع لبرنامج الأغذية العالمي في تطوير الصناعات الغذائية المحلية المشاركة، وذلك بهدف التعرف على أثر البرنامج على تطور هذه الصناعات في محاولة للنهوض بالمنتَج الفلسطيني والعمل على رسم سياسات وآليات تمكّن من الارتقاء بالصناعات الغذائية والاقتصاد الفلسطيني في قطاع غزة.

إن هذه الاستبانة موجهة إلى أصحاب/مدراء المنشآت الصناعية التي تم إدراج منتجاتها الغذائية في برنامج القسائم الشرائية، وسيتم تعبئة الاستبانة بمساعدة باحث عن طريق مقابلة شخصية.

إن تعاونكم سيكون سبباً في نجاح هذه الدراسة للنهوض بقطاع هام من قطاعات الاقتصاد الفلسطيني ألا وهو قطاع الصناعات الغذائية، علماً بأن المعلومات الواردة في هذه الاستبانة هي لأغراض البحث العلمي فقط ولن يتم نشرها أو إعلانها لغير هذا الغرض.

شاكرين لكم حُسن تعاونكم

الباحث

محمد عبد الرحيم المدهون

القسم الأول: معلومات شخصية:

1. الجنس: ☐ ذكر ☐ أنثى

2. العمر:

☐ 30 عام أو أقل ☐ 31 – 40 عام ☐ 41 – 50 عام ☐ 51 – 60 عام ☐ أكثر من 60 عام

3. عدد سنوات الخبرة:

☐ 5 أعوام أو أقل ☐ 6 – 10 أعوام ☐ 11 – 15 عام ☐ 16 – 20 عام ☐ أكثر من 20 عام

4. مستوى التعليم: ☐ دون الثانوي ☐ ثانوية عامة ☐ جامعي ☐ دراسات عليا

5. المسمى الوظيفي: ☐ مالك المنشأة ☐ مدير المنشأة ☐ مالك ومدير المنشأة ☐ غير ذلك .....

القسم الثاني: معلومات خاصة بالمنشأة:

6. العمر الزمني للمنشأة:

☐ 5 أعوام أو أقل ☐ 6 – 10 أعوام ☐ 11 – 15 عام ☐ 16 – 20 عام ☐ أكثر من 20 عام

7. عنوان المنشأة حسب المحافظة التابعة لها:

☐ محافظة شمال غزة ☐ محافظة غزة ☐ محافظة الوسطى ☐ محافظة خانيونس ☐ محافظة رفح

8. الشكل القانوني للمنشأة:

☐ منشأة فردية ☐ شركة تضامن ☐ شركة مساهمة خاصة ☐ شركة مساهمة عامة ☐ جمعية تعاونية صناعية

9. نوع المنتجات المدرجة في برنامج القسائم الشرائية والتي تنتجها المنشأة: (يُسمح بأكثر من خيار)

☐ منتجات الألبان ☐ زيت الزيتون ☐ الدقيق ☐ الحبوب ☐ الطحينية ☐ الدقة/الزعتر

10. العدد الحالي للعاملين في المنشأة:

☐ 5 عمال أو أقل ☐ 6 – 10 عمال ☐ 11 – 15 عامل ☐ 16 – 20 عامل ☐ أكثر من 20 عامل

11. عدد العاملين في المنشأة قبل الاشتراك في برنامج القسائم الشرائية:

☐ 5 عمال أو أقل ☐ 6 – 10 عمال ☐ 11 – 20 عامل ☐ 21 – 30 عامل ☐ أكثر من 30 عامل

12. حجم رأس المال المستثمر في المنشأة بالدولار أمريكي:

☐ 10 آلاف أو أقل ☐ 11 – 30 ألف ☐ 31 – 50 ألف ☐ 51 – 100 ألف ☐ أكثر من 100 ألف

13. متى بدأ اشتراك منتجات المنشأة في برنامج القسائم الشرائية:

☐ 1 عام أو أقل ☐ أكثر من عام وأقل من 3 أعوام ☐ من 3 إلى 6 أعوام

14. العدد الكلي للمنتجات التي تنتجها المنشأة: ..... منتَج.

15. عدد المنتجات التي تنتجها المنشأة ويتم شراؤها عبر برنامج القسائم الشرائية: ..... منتَج.

16. عدد المحلات التي كانت تغطيها المنشأة قبل الاشتراك في برنامج القسائم الشرائية: ..... محل.

17. عدد المحلات التي تغطيها المنشأة بعد الاشتراك في برنامج القسائم الشرائية: ..... محل.

القسم الثالث: مساهمة برنامج القسائم الشرائية في تطوير المنشأة:

يُرجى تحديد درجة اتفاقك حول كل محور من المحاور الأربعة الخاصة بمساهمة برنامج القسائم الشرائية في تطوير المنشأة حسب المقياس من 1 إلى 10، بحيث يمثل 1 أدنى درجات الموافقة، وتمثل 10 أعلى درجات الموافقة.

المحور الأول: مساهمة برنامج القسائم الشرائية في تطوير الجودة:

ساهم إدراج منتجات المنشأة في برنامج القسائم الشرائية في:		1 – 10
1	زيادة الاهتمام بتحسين جودة المنتجات	
2	قيام المنشأة باستشارة متخصصين في مجالات التغذية والتصنيع الغذائي	
3	استخدام المنشأة لمواد خام ذات جودة أعلى في عملية الإنتاج	
4	قيام المنشأة بفحص المواد الخام قبل عملية الإنتاج	
5	تحسين شروط التخزين الخاصة بالمواد الخام	
6	قيام المنشأة بفحص المنتجات بعد عملية الإنتاج	
7	تحسين شروط التخزين الخاصة بالمنتجات بعد الإنتاج	
8	تحسين التغليف والشكل النهائي للمنتجات	
9	الاهتمام بتاريخ الصلاحية ووضعه على المنتجات	
10	سعي المنشأة إلى تطبيق أحد أنظمة الجودة والحصول على شهادات للجودة	

المحور الثاني: مساهمة برنامج القسائم الشرائية في تطوير الإنتاج:

ساهم إدراج منتجات المنشأة في برنامج القسائم الشرائية في:		1 - 10
11	وضع خطط إنتاجية واضحة لزيادة وتطوير الإنتاج في المنشأة	
12	زيادة حجم الإنتاج	
13	تطوير خطوط الإنتاج المستخدمة بإضافة معدات وآلات جديدة	
14	إضافة خطوط إنتاج جديدة	
15	إنتاج المنشأة لمنتجات جديدة	
16	التوسع والزيادة في الاستثمار في المنشأة	
17	توسعة المنشأة (أرض، مبنى، مخازن، ...)	
18	تحسين الكفاءة الإنتاجية للمنشأة من خلال تطوير أساليب وطرق التصنيع وزيادة الاعتماد على التقنيات الحديثة	
19	زيادة استغلال المنشأة لطاقتها الإنتاجية من خلال الاستغلال الأمثل للموارد	
20	زيادة قنوات توريد المواد الخام والتعامل مع أكثر من مورّد	
21	العمل على وضع نظام مخزون دقيق وفعال يساعد على فعالية سير عملية الإنتاج	

المحور الثالث: مساهمة برنامج القسائم الشرائية في تطوير الموارد البشرية:

ساهم إدراج منتجات المنشأة في برنامج القسائم الشرائية في:		1 - 10
22	وضع خطة لإدارة الموارد البشرية للمنشأة	
23	تشغيل عاملين جدد في المنشأة	
24	استقطاب متخصصين في مجال التغذية والتصنيع الغذائي	
25	تحسين أجور العاملين في المنشأة	
26	زيادة الحوافز المقدمة للعاملين في المنشأة كالمواصلات ووجبات الطعام والهدايا وغيرها	
27	تحسين عقود العاملين في المنشأة	
28	تقديم تأمينات للعاملين في المنشأة تشمل تأمينات صحية وتأمينات ضد الحوادث والحريق والسرقة	
29	عقد برامج تدريب خاصة للعاملين في المنشأة	

المحور الرابع: مساهمة برنامج القسائم الشرائية في تطوير الأداء التسويقي للمنشأة:

ساهم إدراج منتجات المنشأة في برنامج القسائم الشرائية في:		1 - 10
30	زيادة الحصة السوقية لمنتجات المنشأة	
31	زيادة ربحية المنشأة	
32	توسيع قنوات التوزيع لتشمل أسواق جديدة	
33	تحسين وسائل الترويج للمنتجات	
34	جذب زبائن جدد من غير المستفيدين من البرنامج	
35	زيادة الاهتمام برضا المستهلك	
36	تحقيق ميزة تنافسية للمنتجات	
37	منافسة المنتجات الإسرائيلية والمستوردة في السوق المحلي	
38	تحسين الصورة الذهنية لمنتجات المنشأة لدى الزبائن	
39	إنتاج عبوات جديدة للمنتجات بأحجام مختلفة تلبي رغبات المستهلك	

ANNEX 3:

LIST OF REFEREES

Name	Place
Dr. Waseem Al-Habil	Islamic University of Gaza
Dr. Akram Sammour	Islamic University of Gaza
Dr. Yasir Al-Shurafa	Islamic University of Gaza
Dr. Khaled Al-Madhoun	University of Palestine
Dr. Esam Al-Buhaisy	University of Palestine
Mrs. Sahar Natsheh	WFP Country Office - Jerusalem
Mr. Amir Yasin	WFP Gaza Office

ANNEX 4:

LIST OF PARTICIPATING FOOD PRODUCERS

	Name	Type
1	Dardona dairy factory	Dairy products
2	Abu Eriban dairy factory	
3	Sawafiry dairy factory	
4	Jamal Abu Eita dairy factory	
5	Abu Eita dairy factory	
6	Khalij dairy factory	
7	Nada dairy factory	
8	Al-Ard Al-Khadra company	Olive oil
9	Dimiaty company	Tahina
10	Safadi company	
11	Al-Wisam company	
12	Al-Hana company	
13	Al-Salam Mills	WHFL
14	Al-Fayhaa Mills	
15	Salam factory for Maftoul	Cereals
16	Sha'ab factory for Maftoul	
17	Al-Sham for food processing	
18	Yasin for food processing	
19	Sabaia food processing unit	
20	Khairat Al-Sham for food processing	
21	Khairat Al-Shamal for food processing	
22	Sheikh Redwan factory for Maftoul	
23	Al-Ayoubi company	Dogga/Zaatar
24	Al-Bait Al-Fakher company	
25	Badri w Hania company	

ANNEX 4:
DETAILED ANALYSIS RESUTLS ACCORDING TO PRODUCTS' TYPES

Type	Field	Paragraph	N	Mean %	Total Mean %
Dairy products	Quality	Increasing the concern of improving the quality of products	7	82.9	69.45
		Consulting specialists in the fields of nutrition and food processing	7	54.3	
		Using raw materials of higher quality	7	71.4	
		Testing the raw materials before production	7	78.6	
		Improving the storage conditions of the raw materials	7	65.7	
		Testing the products after production	7	64.3	
		Improving the storage conditions of the products after production	7	75.7	
		Improving the packaging and the final form of the products	7	88.6	
		Labeling the expiry date	7	78.6	
		Organization's attempt to apply a quality control system and to obtain quality certificates.	7	51.4	
	Production	Developing clear plans to increase and develop the production.	7	70.0	73.2
		Increasing the volume of production	7	80.0	
		Developing the production lines by adding new equipment and machines	7	74.3	
		Adding new production lines	7	75.7	
		Producing new products	7	85.7	
		Expansion and increase in the investment	7	75.7	
		Expansion and adding new assets (Land, building, warehouse, …)	7	74.3	
		Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	7	72.9	
		Increasing the utilization of production capacity through the optimum utilization of resources.	7	58.6	
		Increasing the supply channels of raw materials and dealing with more than one supplier	7	75.7	
		Developing an accurate and efficient inventory system that helps the effective functioning of the production process	7	62.9	
	Human Resources	Developing a plan for the management of human resources	7	60.0	53.9
		Hiring new workers	7	74.3	
		Hiring specialists in the field of nutrition and food processing	7	55.7	
		Improving the wages of workers	7	67.1	
		Providing workers with incentives like transportation allowance, food meals, gifts, …etc	7	58.6	
		Improving the contracts of workers	7	48.6	
		Providing workers with insurance including health insurance, insurance against accidents, fire, theft, … etc	7	14.3	
		Holding training programs for the workers	7	52.9	
	Marketing Performance	Increasing the market share of the products	7	78.6	76.0
		Increasing the profitability	7	65.7	
		Expanding distribution channels to include new markets	7	72.9	
		Improving the means of promotion and advertising	7	60.0	
		Attraction of new customers other than the voucher programmes's beneficiaries	7	80.0	
		Increasing the interest in customer satisfaction	7	85.7	
		Achieving a competitive advantage for products	7	85.7	
		Competing with the Israeli and imported products in the local market	7	72.9	
		Improving the customers' mental image about the products	7	78.6	
		Producing products of different sizes to meet consumer needs	7	80.0	

Type	Field	Paragraph	N	Mean %	Total Mean %
Olive Oil	Quality	Increasing the concern of improving the quality of products	1	40.0	33.85
		Consulting specialists in the fields of nutrition and food processing	1	30.0	
		Using raw materials of higher quality	1	20.0	
		Testing the raw materials before production	1	30.0	
		Improving the storage conditions of the raw materials	1	10.0	
		Testing the products after production	1	20.0	
		Improving the storage conditions of the products after production	1	20.0	
		Improving the packaging and the final form of the products	1	50.0	
		Labeling the expiry date	1	100.0	
		Organization's attempt to apply a quality control system and to obtain quality certificates.	1	10.0	
	Production	Developing clear plans to increase and develop the production.	1	50.0	33.6
		Increasing the volume of production	1	60.0	
		Developing the production lines by adding new equipment and machines	1	30.0	
		Adding new production lines	1	10.0	
		Producing new products	1	10.0	
		Expansion and increase in the investment	1	40.0	
		Expansion and adding new assets (Land, building, warehouse, …)	1	10.0	
		Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	1	40.0	
		Increasing the utilization of production capacity through the optimum utilization of resources.	1	40.0	
		Increasing the supply channels of raw materials and dealing with more than one supplier	1	30.0	
		Developing an accurate and efficient inventory system that helps the effective functioning of the production process	1	50.0	
	Human Resources	Developing a plan for the management of human resources	1	20.0	21.3
		Hiring new workers	1	50.0	
		Hiring specialists in the field of nutrition and food processing	1	10.0	
		Improving the wages of workers	1	20.0	
		Providing workers with incentives like transportation allowance, food meals, gifts, …etc	1	30.0	
		Improving the contracts of workers	1	10.0	
		Providing workers with insurance including health insurance, insurance against accidents, fire, theft, … etc	1	10.0	
		Holding training programs for the workers	1	20.0	
	Marketing Performance	Increasing the market share of the products	1	50.0	45.0
		Increasing the profitability	1	30.0	
		Expanding distribution channels to include new markets	1	70.0	
		Improving the means of promotion and advertising	1	30.0	
		Attraction of new customers other than the voucher programmes's beneficiaries	1	30.0	
		Increasing the interest in customer satisfaction	1	20.0	
		Achieving a competitive advantage for products	1	50.0	
		Competing with the Israeli and imported products in the local market	1	70.0	
		Improving the customers' mental image about the products	1	50.0	
		Producing products of different sizes to meet consumer needs	1	50.0	

Type	Field	Paragraph	N	Mean %	Total Mean %
Tahina	Quality	Increasing the concern of improving the quality of products	4	63.3	57.35
		Consulting specialists in the fields of nutrition and food processing	4	30.0	
		Using raw materials of higher quality	4	60.0	
		Testing the raw materials before production	4	63.3	
		Improving the storage conditions of the raw materials	4	53.3	
		Testing the products after production	4	56.7	
		Improving the storage conditions of the products after production	4	50.0	
		Improving the packaging and the final form of the products	4	73.3	
		Labeling the expiry date	4	50.0	
		Organization's attempt to apply a quality control system and to obtain quality certificates.	4	36.7	
	Production	Developing clear plans to increase and develop the production.	4	50.0	57.0
		Increasing the volume of production	4	76.7	
		Developing the production lines by adding new equipment and machines	4	56.7	
		Adding new production lines	4	60.0	
		Producing new products	4	43.3	
		Expansion and increase in the investment	4	53.3	
		Expansion and adding new assets (Land, building, warehouse, …)	4	46.7	
		Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	4	63.3	
		Increasing the utilization of production capacity through the optimum utilization of resources.	4	63.3	
		Increasing the supply channels of raw materials and dealing with more than one supplier	4	60.0	
		Developing an accurate and efficient inventory system that helps the effective functioning of the production process	4	53.3	
	Human Resources	Developing a plan for the management of human resources	4	53.3	50.0
		Hiring new workers	4	56.7	
		Hiring specialists in the field of nutrition and food processing	4	43.3	
		Improving the wages of workers	4	46.7	
		Providing workers with incentives like transportation allowance, food meals, gifts, …etc	4	63.3	
		Improving the contracts of workers	4	43.3	
		Providing workers with insurance including health insurance, insurance against accidents, fire, theft, … etc	4	70.0	
		Holding training programs for the workers	4	23.3	
	Marketing Performance	Increasing the market share of the products	4	76.7	67.3
		Increasing the profitability	4	66.7	
		Expanding distribution channels to include new markets	4	63.3	
		Improving the means of promotion and advertising	4	56.7	
		Attraction of new customers other than the voucher programmes's beneficiaries	4	70.0	
		Increasing the interest in customer satisfaction	4	73.3	
		Achieving a competitive advantage for products	4	66.7	
		Competing with the Israeli and imported products in the local market	4	66.7	
		Improving the customers' mental image about the products	4	63.3	
		Producing products of different sizes to meet consumer needs	4	70.0	

Type	Field	Paragraph	N	Mean %	Total Mean %
WHFL	Quality	Increasing the concern of improving the quality of products	2	85.0	49.10
		Consulting specialists in the fields of nutrition and food processing	2	15.0	
		Using raw materials of higher quality	2	30.0	
		Testing the raw materials before production	2	40.0	
		Improving the storage conditions of the raw materials	2	30.0	
		Testing the products after production	2	55.0	
		Improving the storage conditions of the products after production	2	45.0	
		Improving the packaging and the final form of the products	2	85.0	
		Labeling the expiry date	2	50.0	
		Organization's attempt to apply a quality control system and to obtain quality certificates.	2	90.0	
	Production	Developing clear plans to increase and develop the production.	2	40.0	35.5
		Increasing the volume of production	2	30.0	
		Developing the production lines by adding new equipment and machines	2	55.0	
		Adding new production lines	2	35.0	
		Producing new products	2	15.0	
		Expansion and increase in the investment	2	15.0	
		Expansion and adding new assets (Land, building, warehouse, …)	2	45.0	
		Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	2	30.0	
		Increasing the utilization of production capacity through the optimum utilization of resources.	2	30.0	
		Increasing the supply channels of raw materials and dealing with more than one supplier	2	45.0	
		Developing an accurate and efficient inventory system that helps the effective functioning of the production process	2	50.0	
	Human Resources	Developing a plan for the management of human resources	2	40.0	41.9
		Hiring new workers	2	35.0	
		Hiring specialists in the field of nutrition and food processing	2	15.0	
		Improving the wages of workers	2	45.0	
		Providing workers with incentives like transportation allowance, food meals, gifts, …etc	2	55.0	
		Improving the contracts of workers	2	40.0	
		Providing workers with insurance including health insurance, insurance against accidents, fire, theft, … etc	2	45.0	
		Holding training programs for the workers	2	60.0	
	Marketing Performance	Increasing the market share of the products	2	30.0	66.5
		Increasing the profitability	2	35.0	
		Expanding distribution channels to include new markets	2	55.0	
		Improving the means of promotion and advertising	2	85.0	
		Attraction of new customers other than the voucher programmes's beneficiaries	2	35.0	
		Increasing the interest in customer satisfaction	2	85.0	
		Achieving a competitive advantage for products	2	90.0	
		Competing with the Israeli and imported products in the local market	2	90.0	
		Improving the customers' mental image about the products	2	70.0	
		Producing products of different sizes to meet consumer needs	2	90.0	

Type	Field	Paragraph	N	Mean %	Total Mean %
Cereals	Quality	Increasing the concern of improving the quality of products	8	62.0	52.78
		Consulting specialists in the fields of nutrition and food processing	8	35.0	
		Using raw materials of higher quality	8	75.0	
		Testing the raw materials before production	8	72.0	
		Improving the storage conditions of the raw materials	8	69.0	
		Testing the products after production	8	65.0	
		Improving the storage conditions of the products after production	8	71.0	
		Improving the packaging and the final form of the products	8	73.0	
		Labeling the expiry date	8	80.0	
		Organization's attempt to apply a quality control system and to obtain quality certificates.	8	59.0	
	Production	Developing clear plans to increase and develop the production.	8	71.0	48.0
		Increasing the volume of production	8	58.0	
		Developing the production lines by adding new equipment and machines	8	36.0	
		Adding new production lines	8	43.3	
		Producing new products	8	20.0	
		Expansion and increase in the investment	8	46.0	
		Expansion and adding new assets (Land, building, warehouse, …)	8	31.0	
		Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	8	51.0	
		Increasing the utilization of production capacity through the optimum utilization of resources.	8	51.0	
		Increasing the supply channels of raw materials and dealing with more than one supplier	8	57.0	
		Developing an accurate and efficient inventory system that helps the effective functioning of the production process	8	64.0	
	Human Resources	Developing a plan for the management of human resources	8	53.0	35.8
		Hiring new workers	8	33.0	
		Hiring specialists in the field of nutrition and food processing	8	40.0	
		Improving the wages of workers	8	34.0	
		Providing workers with incentives like transportation allowance, food meals, gifts, …etc	8	49.0	
		Improving the contracts of workers	8	28.0	
		Providing workers with insurance including health insurance, insurance against accidents, fire, theft, … etc	8	18.0	
		Holding training programs for the workers	8	31.0	
	Marketing Performance	Increasing the market share of the products	8	50.0	58.3
		Increasing the profitability	8	47.0	
		Expanding distribution channels to include new markets	8	45.0	
		Improving the means of promotion and advertising	8	53.0	
		Attraction of new customers other than the voucher programmes's beneficiaries	8	52.0	
		Increasing the interest in customer satisfaction	8	75.0	
		Achieving a competitive advantage for products	8	65.0	
		Competing with the Israeli and imported products in the local market	8	62.0	
		Improving the customers' mental image about the products	8	77.0	
		Producing products of different sizes to meet consumer needs	8	57.0	

Type	Field	Paragraph	N	Mean %	Total Mean %
Dogga/Zaatar	Quality	Increasing the concern of improving the quality of products	3	65.0	61.03
		Consulting specialists in the fields of nutrition and food processing	3	15.0	
		Using raw materials of higher quality	3	30.0	
		Testing the raw materials before production	3	55.0	
		Improving the storage conditions of the raw materials	3	75.0	
		Testing the products after production	3	75.0	
		Improving the storage conditions of the products after production	3	90.0	
		Improving the packaging and the final form of the products	3	90.0	
		Labeling the expiry date	3	100.0	
		Organization's attempt to apply a quality control system and to obtain quality certificates.	3	35.0	
	Production	Developing clear plans to increase and develop the production.	3	75.0	56.8
		Increasing the volume of production	3	65.0	
		Developing the production lines by adding new equipment and machines	3	70.0	
		Adding new production lines	3	40.0	
		Producing new products	3	40.0	
		Expansion and increase in the investment	3	40.0	
		Expansion and adding new assets (Land, building, warehouse, …)	3	55.0	
		Improving production efficiency through development of manufacturing methods and increased reliance on the new technologies	3	75.0	
		Increasing the utilization of production capacity through the optimum utilization of resources.	3	65.0	
		Increasing the supply channels of raw materials and dealing with more than one supplier	3	45.0	
		Developing an accurate and efficient inventory system that helps the effective functioning of the production process	3	55.0	
	Human Resources	Developing a plan for the management of human resources	3	30.0	41.9
		Hiring new workers	3	30.0	
		Hiring specialists in the field of nutrition and food processing	3	55.0	
		Improving the wages of workers	3	20.0	
		Providing workers with incentives like transportation allowance, food meals, gifts, …etc	3	35.0	
		Improving the contracts of workers	3	100.0	
		Providing workers with insurance including health insurance, insurance against accidents, fire, theft, … etc	3	30.0	
		Holding training programs for the workers	3	35.0	
	Marketing Performance	Increasing the market share of the products	3	55.0	79.0
		Increasing the profitability	3	55.0	
		Expanding distribution channels to include new markets	3	90.0	
		Improving the means of promotion and advertising	3	75.0	
		Attraction of new customers other than the voucher programmes's beneficiaries	3	60.0	
		Increasing the interest in customer satisfaction	3	100.0	
		Achieving a competitive advantage for products	3	100.0	
		Competing with the Israeli and imported products in the local market	3	55.0	
		Improving the customers' mental image about the products	3	100.0	
		Producing products of different sizes to meet consumer needs	3	100.0	