Tea Programme
BRIEFING
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Traidcraft Exchange
Traidcraft Exchange is an international development NGO that uses the power of trade to bring about lasting solutions to poverty. We run development programmes in Africa and South Asia, work directly with businesses to improve their supply chains, and campaign in the UK for justice and fairness in international trade.

Traidcraft Exchange’s ‘Programme Briefings’ aim to document the approaches, impact and learning achieved by our work within a specific sector. The focus of this Programme Briefing is tea.

We hope that documenting and publishing our work in this way will stimulate discussion with others working in the sector, generating improvements to programming and new collaborations that extend and deepen impact.
Introduction to TEA

Tea is the most widely consumed beverage in the world after water. Despite a decline in consumption in the traditional importing countries of Europe, global consumption and production is predicted to increase and keep rising over the next decade. Production takes place on large estates where green leaf is picked by employed workers, and on small plots of land owned by smallholder farmers, known as ‘small tea growers’. Tea is highly perishable and must be processed quickly after harvesting. Processing involves drying, fermenting and/or cutting of tea leaves. Small growers sell freshly-plucked green leaf to ‘bought leaf factories’ or to local estates for processing, often via short chains of traders known as ‘leaf agents’.

Millions of people globally are engaged in the production and processing of tea; many more rely on tea for their livelihoods. Traditionally, production was dominated by large estates, but numbers of small growers are rising rapidly. The Ethical Tea Partnership estimates that 8 million smallholders in Africa and Asia now contribute around 70% of global tea production. Despite smallholder tea production becoming increasingly important to global supply, many small tea growers struggle to make a decent living. They are constrained by small farms and poor quality land; use of outdated and unproductive farming methods; and a lack of finance to access to and control over key resources such as services and inputs. Access to finance can also be challenging for women due to lack of assets.

Women form the majority of tea workers on large estates, making up 50-80% of the workforce in some places. Discriminatory practices such as lower wages are widespread. Women often face sexual harassment and abuse, a lack of health services and few opportunities for promotion. Traidcraft Exchange’s 2018 report, ‘The Estate They’re In’, highlights the low wages and poor working and living conditions experienced by women workers on tea estates in Assam, India.

Women’s roles in the tea industry

Women play crucial roles in the tea industry. Most pluckers employed on estates are women, and women work in tea factories, as hired labour on small farms, and run their own smallholder tea gardens.

Amongst small tea growers, patriarchal land ownership disempowers women, whilst social norms limit women’s access to and control over key resources such as services and inputs. Access to finance can also be challenging for women due to lack of assets.

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As with all food crops, tea production can have adverse environmental impacts if it is not responsibly managed within the wider eco-system. Conversion of forests into tea farms and monoculture tea production results in biodiversity-loss, tea cultivation can increase soil erosion and reduce soil fertility, incorrect use of agrochemicals can lead to contamination of soil and waterways. Energy use associated with the farming and processing of tea can also contribute to global warming, for example huge volumes of timber are used as fuel at many factories.

Tea production is highly sensitive to changes in growing conditions. Changes in temperature and rainfall patterns are already affecting yield and quality, lowering incomes and threatening rural livelihoods (FAO 2015). Climate change will affect how and where tea can be grown; it has been described as “the most serious long-term challenge” to the sector in Kenya for example (Agritrade 2013). Small tea growers are particularly vulnerable due to their limited access to finance for investing in drought or frost resistant bushes, input materials such as fertilisers, and water harvesting and irrigation systems. With climate change expected to intensify, adaptation and mitigation measures are essential.
Tea Programme Briefing

Traidcraft Exchange (TX) is the sister organisation of Traidcraft Plc, one of the UK’s leading Fair Trade companies. Traidcraft Plc pioneered Fair Trade tea in the 1980s, sourcing first from Sri Lanka and then from India, with sourcing criteria linked to social enterprise and pro-worker activities. In the 1990s Traidcraft Plc and Traidcraft Exchange collaborated with Cafédirect another pioneer Fair Trade brand to launch the UK’s first Fairtrade certified tea from East Africa, with tea sourced first from Uganda and Tanzania, and later Kenya.

The practical experience gained through developing tea supply chains and linking small producers to reliable added-value markets provided Traidcraft Exchange with a solid foundation from which to develop its tea programme. Increased recognition of the growing importance of small tea growers to the industry, as well as the negative impact of falling prices prompted the initiation of the programme in the early 2000s.

Traidcraft Exchange’s smallholder tea programme has been implemented across Kenya, Bangladesh and India.

To date the programme has reached over 26,000 small tea growers in Kenya, 5,000 in Bangladesh and 66,000 in India. It has been implemented in partnership with Centre for Education and Communication in India, Bikash in Bangladesh, and Christian Partners Development Agency and Iriani Tea Factory in Kenya. It has been generously supported by various project grants, including from the UK’s Department for International Development, the European Commission, Christian Aid and numerous Trusts and Foundations.

If the project did not come, we would not have started tea plantation and changed our lives.

I decided to join the EqualiTea Project of Traidcraft Exchange and Bikash Bangladesh. I talked with project staff and what impressed me was that tea has a lifespan of 60 to 70 years so anybody can get set in his life. So when I recognised this, I have put all my efforts into tea plantation. I received training on tea cultivation. I also got the saplings from the EqualiTea project.

First thing, I can now provide my son with a better education. I can now provide better food and clothes for our children, and my social status has improved."

Mr Rahim, a small tea grower in northern Bangladesh

“...
KENYA

Kenya is the third-largest tea producer in the world (after China and India), and the largest exporter of black tea. Tea is central to the economy, it is the third largest foreign exchange earner after tourism and horticulture, providing around 26% of total export earnings and contributing 4% of gross domestic product. Moreover, directly and indirectly, tea employs about 10% of the population, about 4 million people. Unlike in India and Bangladesh where large estates dominate, small tea growers account for over 60% of production. Over 500,000 smallholder farmers are well organized (compared to in India and Bangladesh), and supply over 60 tea factories that process and market their tea. Kenya is often regarded as a successful model of small grower production; however, the experience of farmers themselves suggest that the model, whilst intended to be participatory and representative, tends to be dominated by a small minority.

INDIA

Established in the 1850s, India's tea industry remains of central importance to the national economy. Globally, India is the second largest producer and consumer of tea. Although around 75-80% of Indian tea is consumed domestically, tea remains a valuable source of foreign exchange earnings. The sector plays an important role in employment generation due to its high labour intensity. 95% of India's tea production takes place in four states: Assam, West Bengal, Kerala, and Tamil Nadu. Whilst large estates still dominate, the number of small tea growers is growing quickly (circa 230,000) and are estimated to contribute 36-44% of total production.

BANGLADESH

Although on a smaller scale than in India and Kenya, the tea industry in Bangladesh is nevertheless important to the national economy. Domestic demand is growing at a faster rate than production and Bangladesh is now a net importer of tea. This presents some opportunities, especially for smallholders. Production is dominated by approximately 160 large estates that employ around 100,000 workers and process green leaf in their own factories. The final product is sold primarily through auction. Although small tea growers have proved more productive than estates, smallholder tea farming is a recent phenomenon and in need of a comprehensive programme for its promotion.

CONTEXT

The definition of a small tea grower varies across contexts. In India, small growers are defined as those farming up to 25 acres; in actuality most own less than 2 acres, with the average landholding being just 2.8 acres. In Bangladesh the definition is up to 4.5 acres, however, the average actual landholding is just 1.7 acres. In Kenya the definition is up to 12 acres, and the average landholding is 1.2 acres.

The Traidcraft Exchange tea programme specifically targets growers with less than 2 acres of land.
Traidcraft Exchange’s programme seeks to work across the whole tea supply-chain, ensuring efficiencies generated by improved supply chain management lead to benefits for all players. At the same time however, we recognize that small tea growers are amongst the most vulnerable and least powerful players within these chains. Therefore we work intensively with small growers to ensure that through collective working, benefits for all players. At the same time however, we recognize that small tea growers are amongst the most vulnerable and least powerful players within these chains. Therefore we work intensively with small growers to ensure that through collective working, they are able to capture an increased proportion of the value available in the chain. The aim is to catalyse longer-term inclusive and sustainable growth of the sector.

The diagram below seek to represent this approach; its key elements and achievements to date are explained further below.

**Promoting Collective Working through Institution Building**

At the centre of Traidcraft Exchange’s tea programme is the promotion of collective working through the formation and strengthening of smallholder-led institutions. Collective working enables small tea growers to strengthen their voice, achieve economies of scale, improve negotiating power, and increase market competitiveness. At the village-level it involves the formation of small tea grower groups or societies. These are federated under associations at various levels: sub-district, district, regional or state, and sometimes national. In South Asia, the programme has tended to initiate the group formation process, whereas in Kenya the programme has worked with established groups and supported organisational strengthening. Women’s empowerment has been promoted cross the programme: women have been supported to stand for leadership positions on the executive committees of groups/societies and associations.

**Increasing Small Tea Grower Representation**

The formation and institutional strengthening of associations and national federations has increased the representation of small tea growers in the tea sector. The programme has supported the associations’ organisational capacity to lobby for policies and practices that support the small grower sector.

In India the programme has supported the formation and organizational development of CISTA, the national-level Confederation of Indian Small-Tea Growers Associations. CISTA now has a prominent place within national tea policy-making and works closely with the Indian Tea Board.

In Bangladesh the district small tea growers’ association formed through the programme now sits on the national Tea Board’s ‘Price Fixation Committee’ for the northern region – representing the interests of small tea growers on this critical issue.

In Kenya, in part catalyzed by the programme, small tea growers linked to five factories (including three that actively participated in the programme) launched their own Tea Farmers Association in Nyeri County. Traidcraft Exchange has continued to support the Association through capacity building. Its membership has since grown to 500 growers. The Association is lobbying for better payment terms for small tea growers.

Direct Support to Small Tea Growers

**Reducing Vulnerability and Increasing Resilience**

Better representation and improved agricultural and business know-how they are able to capture an increased proportion of the value available in the chain. The aim is to catalyse longer-term inclusive and sustainable growth of the sector.

**Ensuring Ongoing Provision of Services**

**Building Better Businesses**

**Improving Agricultural Practices**

**Increasing Representation**

**Promoting Collective Working**

In India the programme has supported over 66,000 small tea growers to organize into village-level ‘primary producer societies’, federated under state level associations across Kerala, Tamil Nadu, Assam, West Bengal, Tripura, Mizoram and Arunachal Pradesh. This has enabled farmers to access services and support, negotiate for higher prices from leaf agents, and in some cases trade directly with factories themselves. Crucially, in some areas with high densities of organised small growers, leaf agents have had to increase prices to secure supply even from unorganised growers. In this way, small growers not participating in the programme have also benefited.

In the extreme north of Bangladesh, where the small tea grower sector is in a nascent stage, Traidcraft Exchange and its partner Bikash have pioneered tea as a livelihood option for smallholders and now work with over 5,000 small growers organized into village-level groups and federated under sub-district and district associations.

**Tea Programme Briefing**

Traidcraft Exchange

We are now leaders. We have been taught to ask and now we are asking many questions. We were silent before because we were afraid and we did not think we could ask. Now we are asking; we know it is our right to know.”

Tea Collection Centre Committee Member, Central Kenya
Direct Support to Small Tea Growers cont.

**IMPROVING AGRICULTURAL PRACTICES**

In order to increase and maintain green leaf yield and quality (critical to maintaining price), small tea growers are supported with technical training on sustainable tea cultivation (growing and harvesting), as well as on good agricultural practices generally. The group structure provides an effective and efficient means through which technical training is delivered to large numbers of small tea growers by both public and private service providers.

In 2018 independent evaluation of the programme in Bangladesh found that three years after initiating tea cultivation small growers were harvesting an average of 4,400kg of green leaf per acre, almost 13% higher than previously due to their sales of green leaf. Tea bushes take between 5-7 years to reach their optimal capacity, so a doubling of income whilst young bushes. In addition, the same small growers’ incomes were on average 110% higher than previously from 2012 to 2015, demonstrated that direct trade with ‘primary producer societies’ participating in the programme have initiated direct trade with bought leaf factories. Monitoring of sales data from 169 primary producer societies across West Bengal, Assam, Bodoland and Tripura from 2012 to 2015, demonstrated that direct trade was enabling small growers to benefit from prices 9-21% higher than those offered by local leaf agents. In India some groups have collaborated together to establish their own micro-processing tea units with investment from external stakeholders.

In Bangladesh 280 small growers have been trained as Barefoot Service Providers to provide ongoing, last-mile service delivery to small growers. Barefoot Service Providers have been trained on tea cultivation, enterprise development and business management. Their services have been taken-up widely both by producers participating in the programme and non-participants. Independent evaluation of the work in 2018 found 96% of farmers “highly satisfied” with the services they have received.

**ENSURING ONGOING PROVISION OF SERVICES AND SUPPORT**

Access to affordable and appropriate services is a key issue for small tea growers. Increased organization through group formation and strengthening enables the facilitation of links to existing service providers, both public (e.g. government extension services and schemes) and private (e.g. through tea factories, input sellers). In Bangladesh the programme has trained a cadre of ‘Barefoot Service Providers’ to provide last-mile service delivery to small growers from within their communities.

In 2018 independent evaluation of the work in 2018 found 99% of participating households had savings, compared to only 47% three years earlier at the start of the second phase of the work. Evaluators found the increased liquidity achieved through sale of green leaf had enabled producers to invest in alternative livelihoods options, such as poultry, livestock, and new cash crops such as jute and chilli.

In Bangladesh the resilience of small tea growers has been strengthened through both savings and diversification into alternative income generating activities. Independent evaluation in 2018 found 99% of participating households had savings, compared to only 47% three years earlier at the start of the second phase of the work. Evaluators found the increased liquidity achieved through sale of green leaf had enabled producers to invest in alternative livelihoods options, such as poultry, livestock, and new cash crops such as jute and chilli.

520 Kenyan small tea growers have been supported to diversify their incomes through honey-production. Bee hives are integrated into tea farms without displacing tea bushes, farmers grow flowering plants on the perimeters of their plots to provide forage.

**BUILDING BETTER BUSINESSES**

In addition to improving agricultural practices, the programme has a parallel focus on supporting farmers and their groups to see themselves as agricultural enterprises. This includes: developing a fuller understanding amongst small growers of the whole tea supply chain and alternative routes to market; facilitating business linkages with for example, local factories, training group leaders in negotiation skills, providing training on alternative income-generating activities; and supporting groups to consider how to capture more value from their crop, including through establishing their own micro-processing units in the Indian context for example.

In India, through collective working some ‘primary producer societies’ participating in the programme have initiated direct trade with bought leaf factories. Monitoring of sales data from 169 primary producer societies across West Bengal, Assam, Bodoland and Tripura from 2012 to 2015, demonstrated that direct trade was enabling small growers to benefit from prices 9-21% higher than those offered by local leaf agents. In India some groups have collaborated together to establish their own micro-processing tea units with investment from external stakeholders.

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**REDUCING VULNERABILITY AND INCREASING RESILIENCE**

Given tea’s price volatility and its sensitivity to climate change, a sole focus on tea can be risky for some small growers, especially in contexts where small land-plots are diminishing in size, as in Kenya. Income diversification is a key theme in these contexts, through both on-farm and off-farm income generating activities. In contexts where small growers are largely dependent on single buyers of their leaf, diversification has been an integral part of small grower empowerment—reducing dependency. Furthermore, diversification can be a key strategy for supporting economic empowerment of women, especially in contexts where male-domination of traditional cash-crops such as tea can work to limit women’s influence over income and spending decisions. The programme has also promoted group savings to provide a social safety net and support income diversification through investment in new productive enterprise.

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...after the project, farmers are well aware of the benefits of tea cultivation and they themselves are highly motivated to cultivate tea. The farmers are well linked and connected with Tea Board and other relevant offices to acquire the technical knowledge for tea cultivation.”

Managing Director of Bought Leaf Tea Factory in Bangladesh
A whole supply-chain approach

Alongside the work to strengthen the position of small tea growers described above, the programme has developed a whole supply-chain approach to bring together all relevant actors across the tea supply chain to increase efficiency and improve supply chain management.

**Tea Factory Manager, Central Kenya**

"The way we engage with the farmers has really improved. We realised this from the end of the [Fair Cup] training... The farmers' attitudes have changed towards their company [the tea factory]. They talk about good things objectively and even negative things are raised objectively."

"Fair Cup" is a project which formed part of the Tea Programme in Kenya.

**Traidcraft Exchange’s whole supply chain approach**

- **Facilitating dialogue between supply chain actors**
- **Looking for win-wins**
- **Working with existing structures, support & services**

**FACILITATING DIALOGUE**

Since its initiation the programme has sought to bring together key stakeholders and to facilitate dialogue - generating a sense of shared responsibility and agency. Challenging as this has been – at times involving outright hostility – it has been a significant achievement across all contexts. As the programme has evolved, Traidcraft’s understanding of the roles of different actors has deepened, enabling us to include otherwise overlooked stakeholders such as leaf agents.

**WORKING WITH EXISTING STRUCTURES, SUPPORT AND SERVICES**

With long-term sustainability in mind, in each country-context the programme has prioritized using existing structures, support and services. In Kenya for example, this has included working with tea factories to deliver training through their existing extension services and Farmer Field Schools. In India and Bangladesh, the programme has worked closely with government extension services to reach out to groups.

Working closely with **four tea factories** in central Kenya, the programme has built the leadership and management skills of 140 small tea grower **Collection Centre committees** - these committees form the hub around which local small farmers are organized. Through the Collection Centres, over 26,000 small tea growers were trained on their rights and responsibilities, and, via Farmer Field Schools, on tea cultivation and harvesting techniques. Independent final evaluation of the work found that after four years, 90% of participating small growers could articulate their rights and responsibilities.

**LOOKING FOR WIN-WINS**

Building on the above, the programme actively seeks to identify solutions that bring benefits to all stakeholders. The programme has enabled government agencies to increase the outreach of their support and services; private sector service providers have expanded their customer base; tea factories now receive more and better quality green leaf; and small growers have reduced costs, more easily accessed public schemes, and increased bargaining and lobbying power through working together. The dynamics of each situation are different and it is important to acknowledge that sometimes there will be losers amongst the winners, especially where improving efficiency requires a reduction in length of the supply chain.
It’s all about power…

Tea is a well-established cash crop in all target countries, as such the programme has had to engage with entrenched interests and local elites. Understanding how power operates in each context is critical: sources and forms of visible, invisible and hidden power; the impact of power relationships within supply chains, and between private, public and civil society actors. A structured process of power and vulnerability analysis helps develop a shared understanding of how power works, who benefits, how it can be changed and where resistance might come from. This requires a sensitive and nuanced approach, best provided by local actors. Oftentimes however, it can be hard to know where the real power is until you jump in and act, therefore regular review and updating of the power analysis is crucial.

In India for example, leaf agents act as middlemen between small growers and factories. They are powerful players, determining price and in many cases providing “the only window to the wider tea world for the small tea grower” as vividly described by one of the programme’s managers. When a sufficient critical mass of small growers in a locality are well-organized, the balance of power can tip, enabling other small growers to demand better prices from agents.

Gender is of course a fundamental vector of power in all contexts. Our programme in Bangladesh has developed a ‘household approach’ to ensuring the active participation of both male and female household members. Through the approach, the programme team sensitively and constructively challenges patriarchal norms that limit women’s opportunities and outcomes. In Kenya the team has commissioned research into the opportunities and challenges faced by women in the tea sector. Traidcraft Exchange still has a lot to learn in this area, but is taking active steps in this direction.

Be clear about what is achievable and by whom…

Traidcraft Exchange’s natural position is to follow a multi-stakeholder approach that seeks to understand the perspectives of different stakeholders and look for the win-win solutions that bring benefits to all, resulting in more efficient, effective and sustainable supply chains in which value is more equitably shared. A beautiful theory, but in situations where power is very entrenched it can be hard to put into practice. In some contexts, there may be a need for power to be challenged to become more accountable and transparent. This, however, may not be a role for an international NGO; instead the programme has supported the formation of well-governed and effective small tea grower institutions and assisted them to assess options and develop appropriate strategies.

Sustaining collective working…

Collective working is fundamental to the programme’s empowerment approach. However, sustaining small grower interest in and the collective identity of groups/societies has proved challenging in some contexts. Institutions need to respond to felt needs and deliver real benefits to members if they are to sustain. The more an institution offers, the more it will be valued by members even when tea prices are low. In Bangladesh, the programme supports groups to develop savings and make investments in productive micro-enterprise. In Kenya, the
programme supported groups to develop beekeeping enterprise. In India, groups were supported to seek ways to capture more of the value of their trade in tea, for example by forming producer companies to manage their own mini-processing units. Ensuring the ongoing active participation and leadership of women in small tea grower institutions is an area where we recognize we need to understand more.

Diversification for empowerment…

Alongside collective working as a route to economic and social empowerment, the programme has worked with small growers to diversify away from their reliance on tea. In Kenya for example, Traidcraft Exchange has worked with small growers to take-up beekeeping: there is high demand regionally for honey and production does not impinge upon established tea bushes. The work has generated a hugely positive response amongst the growers themselves who report increased income and improved cashflow, in turn reducing indebtedness. In the longer term it also contributes to greater power to leverage change in the tea supply chain by reducing growers’ dependency.

Change in income as a proxy for change in power…

Change in income is one of the programme’s key impact indicators. However, measuring change in income is challenging and attribution even more so. Given the volatility of tea prices, ‘snapshot’ percentage increases in income can be misleading. More fundamentally, do changes in income level provide a good enough picture of shifts in the balance of power? It may take time for shifts in power to translate into increased incomes, and there may be times when producers earn more, even if the balance of power hasn’t shifted, for example through improving efficiency and reducing costs.

The situation for tea workers

The advocacy work of Traidcraft Exchange in the UK has raised awareness of the appalling working and living conditions for tea estate workers in Assam, and shone a light on how UK purchasing practices impact the lives of both farmers and workers, particularly women. Traidcraft Exchange’s development programmes in South Asia and East Africa have focused largely on the small tea grower sector. In some contexts (e.g. the nascent small grower sector in Bangladesh) small growers rely on family members for tea plucking. However, in other contexts, small growers do employ labourers as tea pluckers. Whilst independent evaluations of the programme have evidenced improvements in income level for the small growers themselves, to date the programme has not be able to successfully engage with labourers to ensure they also benefit. ¹

Policy and Advocacy Work in the UK

At the same time as the Traidcraft Exchange programme is working directly on the ground with small tea growers, our UK-based policy and advocacy teams are working to raise awareness of the impact of current tea buying practices, as well as promoting alternative practices that can ensure the longer-term sustainability of the sector. Most recently in 2018, our advocacy work our advocacy work has encouraged the six largest tea brands in the UK to publish their supplier lists. More transparent sourcing can help ensure that social compliance and responsible business obligations are adhered to. The teams have also published a practical buying guide that sets-out how international tea buyers can positively transform their buying practices: A Fair Cup – towards better tea buying.

¹ In addition, as a Fair Trade organisation, Traidcraft Exchange is very aware of research such as that published by SOAS in 2014 that indicates that the benefits of Fairtrade certification are not flowing beyond the small producers to their labourers in East African contexts such as Uganda.

I was amazed to see the high level of awareness among the farmers regarding crop cultivation, especially tea. I shared with them the support my office can provide to them for their capacity development and surprisingly I started getting calls from the farmers who were requesting us to incorporate a training on tea cultivation within the scope of our office.”

Youth Development Officer, northern Bangladesh