



USAID | **SPEED**
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SPEED PROJECT QUARTERLY REPORT

APRIL - JUNE 2013

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SPEED Project Quarterly Report

April – June 2013

EXECUTIVE SUMMARY

SPEED is a USAID-funded project designed to improve the business environment through better trade and investment policies. SPEED's goal is to have more companies doing more business, resulting in increased trade and investment and a stronger competitive position for Mozambican firms, thus creating local opportunities for jobs and income growth.

The project focuses on reforming trade and investment policies and also emphasizes the policy implementation process, including monitoring implementation of reforms. The SPEED team delivers training and technical assistance to build the capacity of business associations and corresponding government institutions and catalyzes trade and investment in Mozambique.

Over the remaining 15 months of the project, it is likely that SPEED will focus more on communication campaigns and implementation support. The country is entering a new political cycle with local elections in November 2013 and national elections in November 2014. It is widely believed that political concerns will consume much if not most of the energy of key Ministers. Therefore, working to improve administrative procedures, streamline processes, and build awareness and advocacy around business environment issues will likely yield better results than promoting reforms that require legislative and/or cabinet-level approvals.

The SPEED approach is demand-driven and flexible, placing a high premium on the use of Mozambican expertise to achieve sustainable results. DAI and Nathan Associates implement the project with the assistance of local contractor SAL & Caldeira.

The activities described in this report are divided into four thematic sections: business environment, trade, and investment; tourism and biodiversity; agriculture; and democracy and governance. The report contains information on the context, activities undertaken this quarter, results, and next steps for each of the main activities where SPEED made substantial progress.

Business environment, trade and investment. The bulk of SPEED's efforts focus on working with the private sector and Government to improve the business environment via a wide range of partnerships and activities at both the **macro** and the **micro** level. At the macro level, SPEED works with the Tax Authority and Customs to improve the country's **foreign trade** systems to help spur competitiveness and economic growth. At the other end of the spectrum, SPEED works at the more tactical level to support the Government of Mozambique's (GOM's) efforts to improve the country's ranking in the IFC/ World Bank's *Doing Business* report. For example, concrete recommendations and reforms at the municipal level in Maputo are estimated to save

businesses approximately 290 days to obtain their construction permits, while work on consolidating business registration forms could reduce the number of procedures from nine to two.

SPEED also works to strengthen the key **institutions** required for a strong business environment. An example includes support for building the capacity of **CTA**, the Confederation of Business Associations, which is the main private sector interlocutor with Government on business environment issues. SPEED contributes a Senior Advisor to CTA, facilitates strategy-building, and implements many joint projects.

Agriculture. With three-quarters of the population dependent on agriculture for their livelihoods, there is a consensus both globally and within the country that the private sector needs to play a leading role in developing agriculture. SPEED's activities to support the competitiveness of agriculture in Mozambique center upon direct support to the Ministry of Agriculture's **Senior Economic Advisor** to the Minister, whose primary responsibility is to develop and implement the Agriculture Investment Plan. The Senior Economic Advisor is also a key player in raising Mozambique's profile, together with the Minister of Agriculture, in important initiatives including the **G8 New Alliance for Food Security in Africa**. In addition, SPEED supports a number of **targeted activities** that have been specifically identified by the private sector in agriculture. An example is the work on the impact of various taxes and non-fiscal barriers on the sector.

Tourism and biodiversity. SPEED's work in tourism and biodiversity focuses on helping Mozambique to realize its potential competitiveness in the sector. Tourism is widely seen as one of the most effective ways of preserving biodiversity, as market forces all pull in the same direction – consumers and providers all have an interest in preserving the natural environment and ensuring sustainable use of natural resources. In addition, tourism tends to be labor-intensive, thus providing opportunities for broad-based economic growth as well as biodiversity. The majority of SPEED's effort helps ensure a private-sector friendly **legal and regulatory regime**. An example of legal and regulatory work includes an examination of competition in aviation (Open Skies initiative).

Democracy and Governance. SPEED's work on democracy and governance aims to improve **transparency** around such issues as the impending resource boom, increase the voice of the private sector in policy, and improve corporate ethics. Specifically, SPEED continues to raise the quality and level of dialogue around the country's **resource boom**, most recently regarding the newly proposed fiscal regime for extractives. This issue will continue to grow in importance from the democracy and governance perspective. Another key area of work includes the development of a legal framework that would formalize public participation in the policy process.

Capacity building. This quarter SPEED supported **four capacity-building events** in support of its technical programs, with a total of around 157 participants, including more than 28 women (see Annex 1). Interestingly, all four events were held outside of Maputo.

Management and administration. This quarter, SPEED began implementing the **Communication for Policy Change (C4PC)** initiative, increased activity on the new SPEED **website**, including several blogs by staff and guest bloggers, finalized support for USAID's **CDCS** assessments for extractive industries, and moved forward on several **IPEME** grant procurements.

BACKGROUND

SPEED is a USAID-funded project designed to improve the business environment through better trade and investment policies. SPEED works to improve the business environment by supporting and expanding ongoing efforts to strengthen Mozambique's economic, legal, and governance systems. SPEED's goal is to have more companies doing more business, resulting in increased trade and investment and a stronger competitive position for Mozambican firms, thus creating local opportunities for job and income growth. SPEED's [website](#) contains further information and reports published by the project, as well as a number of timely blog posts.

The project focuses on reforming trade and investment policies and also emphasizes the policy implementation process, including monitoring implementation of reforms. The SPEED team delivers training and technical assistance that builds the capacity of business associations and corresponding government institutions and catalyzes trade and investment in Mozambique.

Over the remaining 15 months of the project, it is likely that SPEED will focus more on communication campaigns and implementation support. The country is entering a new political cycle with local elections in November 2013 and national elections in November 2014. It is widely believed that political concerns will consume much if not most of the energy of key Ministers. Therefore, working to improve administrative procedures, streamline processes, and build awareness and advocacy around business environment issues will likely yield better results than promoting reforms that require legislative and/or cabinet-level approvals.

The SPEED approach is demand-driven and flexible, placing a high premium on the use of Mozambican expertise to achieve sustainable results. DAI and Nathan Associates implement the project with the assistance of local contractor SAL & Caldeira.

SPEED is a four year \$19.4 million project which started in August 2010. Funding obligations for the project equaled approximately \$10,241,506 as of June 2013.

This Document

The activities described in this report are divided into four thematic sections: business environment, trade, and investment; tourism and biodiversity; agriculture; and democracy and governance. The report contains information on the context, activities undertaken this quarter, results, and next steps for each of the main activities where SPEED made substantial progress. In addition, those activities that address policy, regulatory or administrative procedure reforms as defined in the SPEED Indicators Tracking Table (SITT) make specific reference to the SITT stage of reform for ease of cross-referencing between this Quarterly Report and the SITT report.

TECHNICAL ACTIVITIES

Business Environment, Trade and Investment

The bulk of SPEED's efforts focus on working with the private sector and Government to improve the business environment via a wide range of partnerships and activities at both the **macro** and the **micro** level. At the macro level, SPEED works with the Tax Authority and Customs to improve the country's **foreign trade** systems to help spur competitiveness and economic growth. At the other end of the spectrum, SPEED works at the more tactical level to support the Government of Mozambique's (GOM's) efforts to improve the country's ranking in the IFC/ World Bank's [*Doing Business report*](#). For example, concrete recommendations and reforms at the municipal level in Maputo are estimated to save businesses approximately 290 days to obtain their construction permits, while work on consolidating business registration forms could reduce the number of procedures from nine to two.

SPEED also works to strengthen the key **institutions** required for a strong business environment. An example includes support for building the capacity of **CTA**, the Confederation of Business Associations, which is the main private sector interlocutor with Government on business environment issues. SPEED contributes a Senior Advisor to CTA, facilitated strategy-building, and implements many projects jointly.

Current quarter results based on previous work. Two initiatives worked on by SPEED in previous quarters have moved forward this quarter: Insolvency Law and Arco Norte Tourism Development Company.

Insolvency law

In 2011, SPEED [reviewed the Insolvency Law](#) that authorizes the Government to establish a legal framework for insolvency and business recovery, and it has been before parliament for several years. The law has been “stuck” in legislative limbo for several months. The law was finally approved by the Council of Ministers during the quarter.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
6	Insolvency law	Policy	4. Passed

Implementation of the law has the potential to turn into another activity assisted by SPEED. The Ministry of Justice is the potential client for this activity. TORs for implementation were finalized. SPEED has not yet committed to assisting the whole implementation project. Sal&Caldeira (S&C) has been asked to present detailed proposals of tasks that would most likely be undertaken by them. SPEED is working on defining the whole budget involved in the implementation of the law and decide on next steps, particularly as regards financing of the activities. SPEED is awaiting proposals from S&C. Dissemination activities are likely to start next quarter.

Arco Norte Tourism Development Company

In 2012, SPEED worked with the National Institute Tourism (INATUR) to build on an earlier USAID project to develop the Arco Norte Tourism Development Company (ANTDC). The goal is to create a public-private partnership that will enable comprehensive and integrated tourism development in the northern part of the country.

The project was suspended in late 2012 due to the failure of the project to meet the conditions of the first deliverable, the incorporation of the ANTDC. This quarter, a number of activities and accomplishments indicate that the project may be re-instated, including a commitment for a \$50 million investment in the Wimbe Tourism Mall in Pemba that would require the incorporation of the ANTDC. The Ministry of Tourism has demonstrated a high-level commitment given this investment opportunity and has allocated \$300,000 in government funding for further tourism master planning in the area. This investment could be a game changer for the ANTDC project, and USAID/SPEED will consider further support going forward.

Partnership for Trade Facilitation

Context. Following recommendations from WTO, WCO and others, Mozambique has carried out a number of customs reforms for facilitating trade. But despite efforts made so far, reports such as the [Doing Business](#) report from World Bank still identify procedural difficulties, time

delays and high costs in the processes for importing and exporting goods from Mozambique. To reinforce ongoing reform efforts in Mozambique and in line with USAID's Partnership for Trade Facilitation Program, the Mozambique Revenue Authority (AT) proposed technical assistance in three areas: Internet Publication, Pre-shipment Inspection (PSI) and Pre-arrival Processing. However, practice has shown that importers are no longer requesting pre-arrival processing. The recently introduced [Single Electronic Window \(SEW\) system](#) solves the problems that were to be solved with the pre-arrival processing. The SEW system by itself is already an order in advance. An importer can request processing of cargo before arrival, 60 days in advance. Thus, the AT requested the substitution of the pre-arrival processing component by the new transit customs component (SEW system) in the PTF project.

The SEW system is at the center of all customs and trade facilitation operations in the country. The newly released Transit Customs module in particular, has been problematic for a number of reasons. This is particularly true for the center of the country, with its major entry point via the port of Beira. SPEED also received feedback from the private sector on the situation with the roll out of the transit module. Problems arose from weak dissemination of the law, contradictory information available and lack of knowledge of appropriate procedures and regulations under the SEW system. There was a perceived need for dissemination of the new legislation and procedures. It was neither understood by the majority of operators nor by customs officials.

This quarter. Recently, there was a senior staff shuffling at AT, and as a consequence some of the ongoing activities were affected. The internet publication work was delayed and the pre-shipment inspection study was also affected. SPEED had to look for a strategic approach for addressing the initiatives that were already underway in partnership with the AT. A high-level meeting resulted in renewed commitment from all parties.

On Internet Publication, the IT firm Mz Business was selected and contracted to redesign the ATM website and create a portal on international trade. National Institute of Information Technology (INTIC) and AT officials were involved in the selection process. SPEED also hired a content specialist for the website. His main task will be to identify and systematically organize all customs legislation, procedures, declarative models and customs management instruments, as well as other relevant information relating to trading across borders that will be made available online. He will coordinate closely with the website designer for the success of this activity. To complement the previously completed [perception survey](#), he will also undertake a quick study to ensure the right and needed information is made available online. The activity is now underway and expectations are to have the new website launched late August to early September. The activity involves website development, training of ATM officials for website management, hardware equipment acquisition, hosting of the website and finally the launching and dissemination process for the website to be known and useful to all.

On Transit Trade, a proposal for the transit customs component was submitted and SPEED assisted with the preparation of draft TORs, which built on earlier SPEED work on the Single Electronic Window. AT approved the proposal that included dissemination of the new legislation to customs officials, economic operators, clearing agents and all interested through workshops and local media. The aim was to cover all the main borders in the center and north of the country as well as the 3 international ports. It would also include equipment supply to set up transit hubs in the country so long as it is crucial to run customs transit. Workshops were held in Beira and Machipanda for dissemination of the new Transit Legislation under the Single Electronic Window system. However the team was recalled from the field by the AT President for a variety of reasons, among them the ongoing revision of the transit law document.

On Pre-shipment Inspection, AT has not yet selected a consultant from the list of three consultants that was sent to them. There have been several delays and now with staff movements at ATM the whole process had to be restarted. More interesting is the clear interest from different institutions and government on the revision of the ‘positive list’ subject to PSI.

Results. Earlier work on surveying users for the Internet Publication project was implemented and analysis for the site itself was completed.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
35	International trade website	Admin Procedures	5. Implementation begun

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
45	International trade website	Admin Procedures	1. Analyzed

On Transit Trade, earlier work on the SEW was accepted by Customs, as evidenced by the launch of the current transit trade program.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
36	Single Electronic Window procedures	Admin Procedures	4. Passed
			5. Implementation begun

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
46	Capitalization of the transit trade module	Admin Procedures	1. Analyzed

The main impact of this project, namely, improved processes and better transparency to make cross-border trade easier, will not be achieved for another several months.

Next steps. Given the central role played by the SEW, the partnership will continue with a special focus on SEW system improvement, resulting in improved competitiveness and a better business environment.

SPEED is not sure of the willingness of the AT in undertaking the PSI study. However, it is still seen as very relevant. It will be named as a key priority in the soon-to-be-approved EMAN II strategy (Business Environment Improvement Strategy) along with the use of scanning machines on the border.

Next immediate steps on internet publication would be the approval of the website layout and to start the procurement process for hardware equipment. Most of the work on this component is expected to be accomplished over the next quarter.

On customs transit, AT still shows high interest to continue work on dissemination of the customs transit legislation. AT will finalize the revision of the law document over the next quarter. After the new law document is made available, SPEED will discuss the next phase of legislation dissemination with ATM.

Streamlining the construction license process in Maputo

Context. The process for issuing construction permits has been identified by the private sector as an important obstacle impeding the easing of doing of business in Mozambique. [According to the *Doing Business* report](#), it currently takes the average business person 380 days to obtain a construction permit. Currently, Mozambique ranks 126th in obtaining a construction permit among 183 economies. There is evidence that relatively simple improvements in streamlining construction permits processes could improve the country's ranking to the 72nd position. SPEED began working with the Municipality of Maputo (CMM) on simplifying the process of obtaining construction permits in October 2011. This earlier work identified a series of recommendations divided into two categories: short-term (low-hanging fruit) and long-term. The short-term reforms have already been implemented and the longer term recommendations are currently under implementation.

Earlier in the fiscal year, SPEED hired two consultants to design a business process management system, create a database that supports file tracking and helped install computing and networking equipment.

This quarter. The systems consultants work was finalized this quarter and the working business process management system was tested and implemented.

SPEED also hired a statistics consultant to perform a time-and-motion impact analysis on the implementation process of short-term reforms through quantitative and comparative analysis

before and after the implementation. This quarter, the consultant finalized the report and presented it to the Municipality of Maputo and SPEED.

Results. The impact analysis calculated that the average total time required for the whole cycle until the award of the Construction License is now 87 with the reforms to date, representing 290 days saved. This is much more significant than the 128 days saved originally estimated by SPEED. SPEED estimates that the new system will achieve further savings, reducing the number of visits that an applicant currently needs to make to the CMM and the internal transfers of physical files.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
47	Construction licenses procedures - Phase II	Regulation	1. Analyzed 2. Presented for consultation 3. Presented for legislation 4. Passed 5. Implementation begun

Next steps. SPEED’s involvement in this project is mainly complete, but SPEED will continue work with the Municipality on monitoring the implementation of other recommended reforms.

Making it easier to pay taxes

Context. Paying taxes was one of the indicators showing no progress in the *Doing Business 2012* report. In fact, the country experienced no progress over the previous three years. According to this report, on average firms make 37 tax payments per year, spend 230 hours a year filing, preparing and paying taxes and pay a total tax rate as a percent of profit of 34.3%. While taxes are essential to fund public services and infrastructure (among other expenses), if it is difficult and costly to pay taxes, a great share of economic activity ends up in the informal sector which pays no taxes at all. This could be the case in Mozambique. At the same time, CTA identified simplifying and reducing the number of tax payments as one of its priorities in its Policy Matrix for 2012 and 2013.

In order to streamline the tax payment system in Mozambique, CTA asked SPEED to carry out a comprehensive study looking at: (i) the time and cost for companies to comply with tax obligations, (ii) tax payments that can be combined to reducing the number of payments over the course of a year, and (iii) possible impacts of such streamlining.

This quarter. The [final draft of the report](#) was prepared and sent to TA for comments, taking into account earlier feedback. SPEED made two presentations to the High Council of the Tax Authority and the report has been approved.

The study recommends the need to accelerate the pace of implementing reforms in the national taxes system in areas such as: i) the introduction of e-taxation ii) simplification of procedures; iii) decentralization and segmentation of small and big taxpayers; the introduction of information campaigns on the advantages and the existing modalities of tax payments; iv) increased numbers of charging stations in areas of high taxpayers concentration ; v) review of the requirements for reimbursement IVA and the option of transforming the amounts owed by the IVA in securities in the financial market; vi) review of taxes for firms-ISPC (Actually, Mozambique charges 32% of IRPC (corporate income tax), this is too high in comparison with others countries such as South Africa 30%, Mauritius 28% and Tunisia 15% respectively).

Related to this topic, SPEED posted a [Blog](#) on the risk of paying taxes becomes a white elephant for private sector in Mozambique.

Results. The work was presented for consultation with AT, submitted for approval and approved. The results of the comparative analysis show that countries more developed than Mozambique apply lower tax rates, have less number of taxes and smaller number of procedures and requirements for declaration and payment of taxes. These conditions contribute to improved competitiveness of enterprises, increased tax revenues and more robust economic development.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
37	Tax payment procedures	Admin Procedures	2. Presented for consultation
			3. Presented for legislation

Next steps: In partnership with CTA and the Tax Authority, SPEED intends to hold a public workshop, scheduled for the third week of July, to present and discuss the final report. At this workshop, SPEED will seek validation from stakeholders and support for the TA to incorporate the proposed recommendation on the strategic plan matrix and in the annual plan.

Streamlining application forms for starting a business

Context. Of the various indicators used to classify a country in the Doing Business ranking, *Starting a Business*, is one of the most relevant. The *Starting a Business* indicator is about all procedures officially required, or commonly practiced, for an entrepreneur to start up and formally operate an industrial or commercial business, as well as the time and cost to complete them and the paid-in minimum capital requirement. There are unnecessary procedures to commence work under the normal licensing of private sector companies in Mozambique. A simple integration of registration forms will reduce procedures from nine to three. The number of days for starting a business will likely reduce to seven from the current thirteen and costs will

likely come down. This simple reform could promote the creation of more jobs in the private sector, also generating more revenue for the government. It will also improve the country's position in the doing business ranking.

Over the last quarter, SPEED hired the law firm Sal & Caldeira (S&C) to streamline application forms for starting a business in Mozambique, taking into account the harmonization of the various public institutions involved. A preliminary draft report was prepared and a consultation workshop was held to discuss the proposed application forms.

This quarter. Sal & Caldeira submitted the final draft of the application forms and there was a first attempt at presenting the forms to the Technical Council at the Ministry of Industry and Trade (MIC) for legislation. However, the forms were not approved and there was a recommendation that the consultant should prepare a foundation document with the work rationale and a presentation to be made to the Technical Council in their next session.

Results. A [final version of the report](#) and application forms was prepared. The legislation process was started internally at MIC, though the forms have not yet been approved.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
40	Streamlining application forms for starting a business	Admin Procedures	3. Presented for legislation

Next steps. A rationale of the work will be prepared and the consultant will make a presentation to the Technical Council at MIC in a second bid to get the forms passed. If passed, the forms will then be submitted to the Advisory Council, which in turn will refer it to the Ministers Cabinet for discussion and approval. If successful and approved, the forms could be implemented as a pilot during the second semester of 2013. SPEED will continue to monitor progress with MIC and advocate for the forms to be implemented. The next phase is mostly MIC dependent.

Business registration equipment

Context. The Mozambican government has recognized the need to: simplify procedures inherent to the constitution and registration of commercial companies; approve the creation of a single record in the country for legal entities; as well establish a one-stop shop as an immediate solution to encourage and stimulate private sector development and attract investment. This act of registration is done by the Registrar of Registration of Legal Entities, an institution under the Ministry of Justice which has the overall aim of streamlining and simplifying administrative procedures. For this purpose, it was necessary to create a central system for data collecting and recording, an effort that is still ongoing.

This quarter. SPEED finalized the procurement process to acquire computers for the business registration agency to accelerate the registration process as part of the Government's strategy for improving the country's Doing Business ranking.

Results. None yet.

Next steps. SPEED is organizing the launch of the equipment grant to be attended by the Minister of Justice. In addition, SPEED will continue working with the Registrar of Registration of Legal Entities on the implementation of the central system for data collection and also on development of mechanism that will assess the impact of the reforms, as well as provide a baseline for measuring future impact.

Business environment annual strategy – EMAN II

Context. In 2008, the GoM approved the Business Enabling Environment Strategy (EMAN), which set forth its commitment to improving the overall enabling environment for private sector growth. Since then, Mozambique has made some improvements to the business environment resulting from legislative and administrative changes that streamlined processes. Nevertheless, the overall pace and depth of reform are still slow. Mozambique's business environment remains restrictive for private sector enterprises. In SADC region, the country remains as one of the worst ranked countries (for instance, by Doing Business), notwithstanding the GoM's ambitious target of turning the country into the best ranked country in the region by 2015.

A need arose for the design of a new strategy to systematically continue to improve the business environment in the country – EMAN II. A national consultant was hired by GIZ to lead a team of experts who worked on the new strategy. The resulting draft of the strategy proposal and activities matrix was produced and circulated by MIC/DASP to different stakeholders. However, there was a general perception that the document needed improvement. Consultation workshops were cancelled and after a series of meetings, it was decided that the main areas for the EMAN II strategy need to be redefined to develop a working template.

This quarter. After a meeting in Catembe followed by a working retreat in Bilene, a widely representative stakeholder team generated a "renewed" set of vectors and a new strategy matrix for EMAN II. The retreat was organized by SPEED. Public institutions, private sector representatives, donor agencies and consultants participated in the workshop. A facilitator was hired to define and coordinate methodology for the workshop. After the retreat, consultants worked on drafting the new strategy proposal. There are fewer and more realistically attainable objectives and activities within the existing lifetime of the strategy. If successful, this will prove more efficient and generate higher impact.

A consultative process with different stakeholders followed. The proposal document was subsequently presented to the Technical Council at the Ministry of Industry and Trade (MIC) for legislation. It is likely that the strategy will be approved next quarter. It is important to note that despite pending approval, some reforms represented in the strategy are already underway, including [‘streamlining application forms for starting a business’](#) and the [‘insolvency law’](#), among a few others.

Results. A new strategy proposal was produced and discussed during consultative process with all interested actors. The legislative process was started internally at MIC, though the strategy document has not yet been approved.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
42	Business environment improvement strategy 2013-2017 (EMAN II)	Policy	2. Presented for consultation
			3. Presented for legislation

Next steps. After clearance from the Technical, Advisory and Economic Councils at MIC, the strategy document shall be submitted to GoM for approval. The subsequent step will be the implementation of the strategy at Ministries and Departments level. The document matrix will be broken down into specific activities and indicators. A monitoring and reporting system shall be put in place to monitor implementation.

PPP regulations consultation

Context. The government of Mozambique sent to the Confederation of Economic Associations of Mozambique ("CTA") for comments, the proposed Specific regulation of Public Private Partnerships that establishes guidelines and procedures applicable to implementation and monitoring of Public Private Partnerships and Small-Business Concessions. CTA asked SPEED to help by providing legal advice and also by organizing a seminar to obtain contributions from the business community.

This quarter. SPEED contracted Sal & Caldeira to review the regulation and organized a workshop to present the regulation and listen to affected entrepreneurs to collect contributions, concerns and clarify the issue.

Results. A final document of comments and inputs was produced and sent to the government of Mozambique.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
52	Public private partnership regulations	Regulation	1. Analyzed 2. Presented for consultation

Next steps. None planned.

Foreign employment impact analysis

Context. Mozambique recently launched its 20 year national development strategy, which sees industrialization as a main goal, using the upcoming natural resource boom as an engine to drive improved agricultural productivity and private sector development. Further, Government has committed to develop a more business-friendly approach in order to attract direct foreign investment and stimulate growth, and recently launched a set of 2nd generation business environment reforms. However, restrictions on the use of foreign labor comprise one area of regulation which can pose a significant risk to these aims. This is a sensitive issue, with firms complaining of a lack of skills locally and restrictions on hiring foreigners hindering growth, while a perception exists among some Mozambicans that foreigners occupy positions that could be filled by nationals. Recent proposals by the Ministry of Labor to increase hurdles for hiring foreigners, at the very beginning of the incipient extractive sector boom, make it even more important to ensure an objective, rational debate about this issue.

Given this situation, ACIS asked SPEED to conduct a review that incorporates the voices of firms, Mozambican workers and embassies of countries with major investments in the country.

This quarter. A brief literature review was carried out and a questionnaire for firms was designed and sent out to ACIS's membership (about 350 firms). In total, 23 firms replied to the questionnaire.

Results. None yet. However, the report is expected to contribute to the overall debate on the proposed labor laws, hopefully altering the path of the current legal proposals.

Next steps. Next steps include a series of in-depth phone interviews with firms (some to follow up on specific issues raised in the questionnaire, others to expand the list of respondents), 3-4 in depth case studies of Mozambican workers' opinions from a range of sectors and life experiences, and 2-3 interviews with embassy representatives regarding business environment concerns and specific consular issues around the proposed alterations to the existing labor law with regard to hiring foreigners. The data will then be analyzed and a draft report produced, and circulated to key stakeholders (i.e., respondents, ACIS), before a final draft is produced.

Institutional support to CTA

Context. CTA is the primary private sector counterpart that advocates for policy change with Government. It has received institutional capacity building support from USAID over the past decade and is a key SPEED partner. To strengthen the quality of services provided to its membership, SPEED is providing capacity support to CTA in the form of a Policy Analyst. SPEED also supports the Executive Director position. With this additional staff, CTA will be more effective in engaging the government in policy dialogue on behalf of the private sector.

This quarter. This quarter, a major SPEED-supported highlight was in the form of a change management consultant who reviewed SPEED's operating model and made concrete recommendations for improving internal process and procedures, as well as strengthening governance mechanisms. In addition, with the exit of the previous SPEED-supported Executive Director, it was mutually decided not to continue supporting that position as a direct SPEED hire. Instead, SPEED is processing a bridging grant to support the Executive Director position until CTA secures additional funding.

Results. None beyond regular operations of CTA this quarter.

Next steps. CTA's newly established Working Committee on the natural resources sector will work with SPEED to consider the pros and cons of developing a local content regulatory framework that will help the SME's to benefit from the natural resources boom. In addition, the biannual meeting with the Prime Minister will take place in early August. CTA will also recruit for a new Executive Director and Finance Director over the course of the coming months.

Support to Tiri Pamodzi

Context. Tiri Pamodzi is a new foundation targeting private sector development, women's empowerment in business, youth entrepreneurship and the impact of HIV/AIDS on business. SPEED's support to Tiri Pamodzi has two components. The first component entails technical assistance aimed at helping Tiri Pamodzi prepare its business plan and accompanying resource mobilization plan. The second component comprises a SPEED grant to acquire basic office equipment, thus enabling the foundation to implement its business plan and objectives, as well as assist Tiri Pamodzi develop its training center.

This quarter. SPEED provided computers and other training materials for the training center which will help Tiri Pamodzi to implement its business.

Results. With an improved business plan, Tiri Pamodzi is designing projects that will allow them to mobilize resources which can make them self-sustainable. Their goal is to promote entrepreneurship, especially among women and youth and to create local opportunities for job and income growth.

Next steps. No new assistance to Tiri Pamodzi has been identified at this stage.

CACM Grant to introduce informal arbitration

Context. In recent years, the number of conflicts between companies has increased, as have the time and expenses associated with resolving business disputes and enforcing commercial contracts. These trends represent a major barrier to development, sustainability and competitiveness in business. The Center for Arbitration, Conciliation and Mediation (CACM) is a nonprofit institution under the aegis of the CTA, formed to encourage and provide access to alternative and appropriate mechanisms for resolving disputes. Dispute resolution systems provide a better solution to businesspeople since they are rapid, economical and fair. SPEED agreed to provide a grant to CACM to implement the following activities:

- Resolution of conflicts
- Prevention of conflicts
- Training of mediators and arbitrators
- Providing public information on alternative mechanisms for conflict resolution
- Expanding the culture of arbitration to other geographic areas and activities
- Connecting with other regional and international forums of mediation and arbitration.

This quarter. No activity this quarter, although technically this is still an active grant.

Results. No reported results this quarter, although across the country, alternative methods of conflict resolution in areas such as employment negotiations were made available for the first time.

Next steps. The CACM grant is ending and no additional funds will likely be granted for this activity. SPEED will continue helping CACM to find viable alternatives to make the organization financially sustainable.

MIC Coordination Council

Context/This quarter. The XI Coordinating Council (CC) of the Ministry of Industry and Trade (MIC) was held from 24th to 26th May 2013, in Pemba, Cabo Delgado Province, under the motto “Achievements and Challenges of the Industry and Trade.”

The XI Coordinating Council was headed by His Excellency Armando Inroga, Minister of Industry and Trade, and counted with the participation of His Excellency Kenneth Travel Marizane, Deputy Minister of Industry and Trade, including the Permanent Secretary, the Inspector General, National Directors, officers and subordinate institutions tutored, Commercial Directors, Advisors, Deputy National Directors, Heads of Departments, Provincial Directors and permanent guests, the Executive Directors of the BAU's, Provincial Delegates of the National Inspection Activities and other senior MIC staff at central and provincial levels. Also a number of members of the Coordinating Council participated as invited representatives of the public sector: the Presidency, the Ministries of Mineral Resources, Energy, Fisheries and Agriculture,

as well as the private sector, namely, CTA - Confederation of Economic Associations and development partners, i.e. USAID. The agenda, was summarized in the following:

- Public Probity Law;
- Economic and Social Plan 2012 and Prospects;
- Swing through the Government's Five Year Programme 2010-2014 and Prospects;
- Operational Matrices of Coordinating Councils from 2010 to 2012 and Prospects;
- Report on the areas of Administration, Finance and Public Sector Reform 2012 and 1st quarter of 2013;
- Proposed Natural Gas Master Plan and;
- Information about the current status of Food Fortification.

Results/next steps. From the presentations and discussion around the different topics, the biggest challenges identified include: the implementation of the Competition Law, local financing for SMEs, to formalize informal trade; implement and consolidate the SADC Free Trade Area; Reduce tariffs, review of the rules of origin for international trade and remove non-tariff barriers; and the implementation of the Mozambican Commodity Exchange/Market (Bolsa de Mercadorias de Mocambique) among others.

Agriculture

With three-quarters of the population dependent on agriculture for their livelihoods, there is a consensus both globally and within the country that the private sector needs to play a leading role in developing agriculture. SPEED's activities to support the competitiveness of agriculture in Mozambique center upon direct support to the Ministry of Agriculture's **Senior Economic Advisor** to the Minister, whose primary responsibility is to develop and implement the Agriculture Investment Plan. The Senior Economic Advisor is also a key player in raising Mozambique's profile, together with the Minister of Agriculture, in important initiatives including the **G8 New Alliance for Food Security in Africa**. In addition, SPEED supports a number of **targeted activities** that have been specifically identified by the private sector in agriculture. An example is the work on the impact of various taxes and non-fiscal barriers on the sector.

Recommendations on taxes in agriculture

Context. Mozambique's agricultural production reaches about one-quarter of GDP, while it incorporates three-quarters of the population. Yields are low and stagnated for over 30 years. Poverty reduction has also stagnated since 2002-03, despite overall economic growth averaging approximately 7 percent per year over the last 15 years. The country is determined to overcome this situation. The Government has approved several incentives for the agriculture sector

including livestock and forestry which include VAT exemption for the first transactions, 80% reduction on the Corporate Income Tax, 50% reduction on the excise tax paid on fuel, duties and VAT exemptions on the imports of equipment, and spare parts for this sector, VAT exemption on several inputs among other incentives. However, discussions with the private sector and other stakeholders have revealed a sense that these tax benefits do not protect domestic production and could even be hurting it.

Building on earlier work, SPEED worked with CTA to produce and [publish a paper on the SPEED website](#) in English and Portuguese. Two of the most important recommendations from the study were:

- Develop and approve invoices/receipts that may be issued by purchasing companies on behalf of smallholder farmers (suppliers) who are not registered taxpayers;
- Eliminate the simplified VAT regime, replacing it with the current ISPC (Simplified Tax for Small Taxpayers).

These recommendations have been included in the policy commitments by the GOM under the New Alliance for Food Security and Nutrition. This commitment provides extra impetus for implementation.

This quarter. Following public seminars on the study, SPEED has held a series of meetings with the Tax Authority to define a road map for implementation of these two recommendations. These discussions revealed that the changes sought require alterations to the VAT code, corporate income tax law, and individual income tax law, which may constrain rapid implementation.

Results. None over the quarter.

Next steps. SPEED is waiting on a course of action to be decided by and discussed with the Tax Authority, and ascertain whether there is truly a need for parliamentary approval to implement the identified reforms. Complete impact assessment work. The worst case scenario would be to wait for parliamentary approval (last quarter of FY 2014) and move forward at that time.

Non-fiscal barriers to agriculture

Context. During the course of SPEED's significant work on the [impact of the tax regime on agriculture](#), a number of stakeholders reported many other problems facing the agriculture sector beyond tax issues. To delve further into this issue, SPEED was requested by CTA to identify those other problems and come out with key recommendations to overcome them. This work began toward the beginning of the fiscal year.

This quarter. The final [report](#) was presented and debated in several public workshops, validating the findings and recommendations made by the study. Comments and opinions made by participants were of high quality. An important recommendation is for CTA to arrange a meeting, possibly behind closed doors, with the President and government institutions to systematically discuss and solve the problems facing agricultural development in Mozambique. It was also suggested by workshop participants that MINAG (Ministry of Agriculture) should lead the reform process from the central to provincial and district levels because the non-tax barriers (BNF) occur locally.

Workshop discussions covered several levels of BNFs, in particular: (i) the distortion in the application of customs procedures, (ii) the almost impossibility of getting access to the diesel subsidy, (iii) the deficit in access to financing, (iv) the technical impediments resulting from weak pest control management (e.g. linked fruit-fly and aflatoxin), (v) the role of rail and port services, and (vi) the implications of dispersal fees and licenses (*guias-de-marcha*) on the movement of agricultural commodities or products through specific checkpoints (*postos de controlo*), which in turn proliferate, multiplying processes, and resulting in disjointed and dysfunctional procedures which are barriers to markets and increase cost/price of goods, among other incongruities. The consultation and validation process has been finalized and report approved in 4 the provinces namely Maputo, Nampula, Manica and Zambezia. These involved several stakeholders such as USAID-funded projects, the Ministry of Agriculture, and the FENAGRI-National federation of farmers. Based on the study evidence, SPEED posted a [blog](#) on the topic of Mozambique needs a new paradigm on agricultural economy.

Results. None yet. However, prioritization and implementation of a few targeted reforms will likely lead to lower costs and higher competitiveness for Mozambique's agriculture sector.

Next steps. Post validation process, SPEED is working with the CTA agriculture working group to define priorities for the implementation of the recommendations with Ministry of Agriculture, Ministry of Transport and Communications, Ministry of Trade and Industry (GIRBI) and the Tax Authority. Possible activities include: 1) Research on the economic implications of the special terminal exports of Nacala (*porto seco- dry dock*); 2) Illegal taxes campaign upon verifying the legal basis for the various "taxas" charged by the district-level check points; 3) "Unfair" competition from the State upon verifying whether this is a real problem facing the private sector; and 4) Informal trading across borders in Mozambique, with a focus on *mukheristas* working across the Ressano Garcia border.

Rural land legal framework capacity building

Context. The Land Law recognizes right to land use, known by the Portuguese acronym, DUAT (*Direito de Uso e Aproveitamento de Terras*). DUATs can be held individually or collectively.

Reports on conflicts of land between local communities and large-scale investors have been on the rise. These conflicts are partly explained by the increasing pressure and high demand for land associated with limited administrative capacity to issue DUATs both at central and local levels. These challenges potentially increase opportunities for corruption and other non-appropriate practices in land administration and management, thus hampering investments. Therefore, obtaining land rights respecting the legal procedures as well as understanding the macro and institutional framework underpinning the process of acquisition of rural land is critical and could contribute to prevent conflicts and to better attract and protect investors.

In 2012, the Commercial and Industrial Association of Sofala (ACIS) requested SPEED's support for production of the third edition of "*The Legal Framework for Recognizing and Acquiring Rights to Land in Mozambique in Rural Areas - a Guide to Legalization and Occupation*", known as the Land Manual. The [Manual](#) was prepared by Sal & Caldeira Advogados, LDA in collaboration with the National Directorate of Land and Forests (DNTF). The Manual aims to support the institutions responsible for the administration and management of land, investors, activists and other stakeholders, dealing with the processes and procedures related to land access in rural Mozambique.

This quarter. SPEED drafted a project proposal in collaboration with the main client, the Ministry of Agriculture/DNTF and other key partners namely: ACIS, CFJJ and Sal & Caldeira Advogados, LDA. This phase two project aims to provide training and dissemination of the Manual of Land in provinces with high rate of land conflicts. The project expects to contribute to improving processing of DUATs, reduce land conflicts, and help meet the GOM's commitment "*to reform land use rights (DUAT) system and accelerate issuance of DUATs to allow smallholders (women and men) to secure tenure and to promote agribusiness investment,*" as per the pledge under the G8 Cooperation Framework to Support the New Alliance for Food Security & Nutrition in Mozambique.

Results. None yet. However, in addition to more than 100 well trained practitioners in land administration and management, in the medium to long term, the project is expected to contribute to increased understanding and increased capacity of land management and allocation, increased transparency of land access procedures and reduced processing time and cost for obtaining rural land use rights (DUATs).

Next steps. Outsource the project training and dissemination services, obtain formal USAID approval and roll out implementation.

Agriculture investment plan

Context. In May 2011 the GOM approved the Strategic Policy for Agriculture Sector Development (PEDSA). Subsequently, in December 2011 the government, with development partners, signed the CAADP Compact. To operationalize these strategic planning instruments, in January 2012 the GOM launched the preparation of the Agriculture Sector National Investment Plan (PNISA). USAID was asked for assistance and SPEED provided a senior economic advisor to coordinate the process. The Investment Plan was approved in December 2012 and submitted for review to the NEPAD Secretariat. The review was concluded early this year and a report with comments and recommendations was submitted to the Government of Mozambique.

This quarter. In April 2013 the Government of Mozambique publically launched the National Investment Plan at the Business Meeting held in Maputo. The Business Meeting was chaired by the Head of State and was attended by government ministers, heads of mission, international organizations, and representatives of the private sector and farmers associations.

Results. Under the investment plan, Mozambique expects to mobilize approximately three billion US-dollars in a period of five years. At the Business Meeting development partners reaffirmed their support to Mozambique’s economic and social development, particularly to the agriculture sector and they pledged an initial amount of \$800,000. With this amount the Investment Plan began implementation immediately during the quarter.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
25	Agriculture Investment Plan	Policy	5. Implementation begun

Next steps. Following the recommendations from the review, a technical working team was established and tasked with the incorporation of the recommendation as well as to develop a monitoring and evaluation plan. Additionally, the team will prepare detailed Terms of Reference for the Agriculture Sector Coordinating Committee set forth in the Investment Plan as the governing structure. The technical working group will also prepare the first policy dialogue between the Government of Mozambique and development partners supporting the agriculture sector scheduled to be held in September 2013. Finally, the technical working group is expected to develop the Terms of Reference for the coordination of implementation of the Investment Plan along the six agriculture development corridors.

As a member of the technical working group, the Economic Advisor will continue supporting this important phase of the implementation of the Investment Plan.

Grow Africa / New Alliance for Food Security in Africa

Context. Following on the CAADP Compact’s efforts, in 2010 the African Union, NEPAD and the World Economic Forum launched the “New Vision for African Agriculture”– also known as

“Grow Africa” – aimed at boosting private investment to develop and transform African agriculture and fight against food insecurity and poverty on the continent. The group of the world’s eight most industrialized countries (G8) also launched the New Alliance for Food Security and Nutrition in Africa in May 2012.

Mozambique and seven other African countries are pilot countries to be supported under Grow Africa. Beneficiary countries prepared and presented concrete business and investment opportunities that were showcased at the Grow Africa investment conference in Addis Ababa, Ethiopia in May 2012. Beneficiary countries are also required to set up a follow up mechanism with companies that have shown interest in investing in these countries.

With regard to the G8 New Alliance for Food Security and Nutrition, Mozambique and six other African countries are considered “vanguard countries” to benefit from this initiative.

This initiative requires countries to commit themselves to improving the business environment through implementation of an agreed set of policy reforms (including some SPEED-promoted reforms). The G8 countries endeavor to provide financial support and to mobilize international private investment. The private sector is expected to make investment commitments in the agriculture sector in partner African countries. USAID and JICA are the coordinating partners for Mozambique in this process.

The framework cooperation agreement under the New Alliance was signed in New York in September 2012, and the SPEED senior advisor is focal point for Mozambique, together with the heads of CEPAGRI and Zambezi Valley Development Authority.

This quarter. The New Alliance Initiative was formally launched in Maputo, Mozambique in April 2013 at a two day international conference chaired by the Minister of Agriculture and attended by international delegations from the G8 member countries, FAO, NEPAD, World Economic Forum, AGRA and national stakeholders representing public and private sectors and farmer organizations. The first day of the conference was dedicated to the reporting on the matrix of policy commitments by the Government of Mozambique and to understanding the mutual accountability process under the New Alliance for Food Security and Nutrition. On the second day, participants discussed the role of the private sector and the process of building partnerships between commercial farmers and smallholder farmers in Mozambique.

From May 8-9, 2013, in Cape Town, South Africa, a Mozambican Delegation participated in the Grow Africa business and investment conference where a stock taking exercise of the results of this initiative in African countries was made. At this conference, the first Grow Africa Annual Report containing country experience and results was launched. The SPEED senior advisor assisted the Ministry of Agriculture in preparing Mozambique’s input for the report.

Results: In addition to launching the implementation of the New Alliance, the main outcome of the conference was the reaffirmation from the allied partners to continue working towards improving food security and nutrition in Mozambique. At the end of the conference, a new matrix of policy commitments by the Government of Mozambique and its implementation timeframe were adopted. With the view to strengthening the capacity of CEPAGRI as the main delivery unit in implementation of the New Alliance process in Mozambique, USAID committed to provide a consultant for a period of six months and in response SPEED procured and seconded an expert to CEPAGRI.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
53	Support of New Alliance projects in Mozambique	Admin Procedures	1. Analyzed 2. Presented for consultation

Next steps. The SPEED-procured expert will support companies in the process of investing in the agriculture sector in Mozambique under the New Alliance for Food Security and Nutrition. In addition, the SPEED senior advisor will continue to coordinate the rollout of the initiative.

MOA capacity-building (Senior Advisor)

Context. The Ministry of Agriculture experienced a very high rotation in its leadership over the last few years, which reflects the elevated expectations – mostly unfulfilled – about agriculture’s contribution to poverty reduction and the fight against hunger in Mozambique. In fact, agriculture is one of the sectors accorded the highest priority in the Poverty Reduction Strategy. The newly appointed Minister, an agriculture expert, asked USAID to second a senior economist to serve as his advisor as a way to strengthen the capacity of MoA. SPEED was asked to provide one of its professionals to MoA in 2011.

This quarter. This quarter, the SPEED-sponsored senior economic advisor to the Minister of Agriculture spurred the completion of the investment plan and its official launch, as well as the conclusion of the accession process of Mozambique to the New Alliance Initiative which culminated with the official launch last April. Both processes are critical for resource mobilization for public and private investment in agriculture in Mozambique. An additional achievement was the contribution made by the economic advisor to the Grow Africa Program where Mozambique is regarded as one of the leading examples.

He was critical in the mobilization of the technical support to CEPAGRI with the secondment of an expert to assist investors under the New Alliance and Grow Africa Initiatives.

Results. The senior advisor is a critical player in agriculture policy in Mozambique. In addition to spearheading the two major initiatives mentioned in the previous paragraphs, he continued to

facilitate constructive dialogue between the MoA and development partners, becoming a trusted and true assistant to the Minister in the field of diplomacy and economic cooperation.

On the other end, the economic advisor has been pivotal in the promotion of technical cooperation between the Ministry of Agriculture and research and educational institutions both national and international, including United States-based universities.

Next Steps. As the implementation of the Investment Plan has started it will be crucial to maintain the level of commitment and engagement both of the Ministry of Agriculture and development partners as well as of the investors. This is key to success of the implementation of the agriculture development strategy and its investment plan.

The senior advisor will continue providing support to the Minister and to the Ministry in the implementation of the dialogue mechanism with the development partners and all the national stakeholders.

Global Forum for Food and Agriculture and AGCO Summit on Africa Agriculture

Context/this quarter. The German Government organizes and hosts an Annual Forum Global Summit on Agriculture, Food Security and Nutrition. Mozambique has participated in the two last editions in 2012 and 2013. This Forum aims to enable countries to exchange ideas and coordinate positions on relevant policy and strategic matters pertaining agriculture food security and nutrition. Concurrently, a business led summit is also organized by AGCO to explore business opportunities in the area of technology and agriculture mechanization.

With the assistance of the economic advisor, the Ministry of Agriculture presented a concept paper for approval by the Council of Ministers for the organization of Mozambique Business Day aimed at promoting investment and business opportunities to the German investors during this quarter. Due to organizational complications this event was postponed for late November or early 2014.

Results/next Steps. Following the Cabinet approval of the Round Table Concept paper presented by the Ministry of Agriculture, SPEED will be asked to assist the preparation of Mozambique for this event.

Agricultural policy exchange and learning event

Context/This quarter. The African Union Commission (AUC), in conjunction with NEPAD Planning and Coordinating Agency (NPCA), convened the Agriculture Policy Exchange and Learning Event from 13th – 16th May in Dakar Senegal. The event aimed to discuss systemic

policy challenges that may be blocking the achievement or effective implementation of National Agriculture and Food Security Investment Plans and identify specific steps that countries can take to overcome these constraints. Countries that participated include Tanzania, Mozambique, Ethiopia, Rwanda, Ghana and Senegal. SPEED supported the Mozambique team by covering the expenses for the CTA policy advisor to attend.

Results/Next steps. Country teams had the opportunity to share country and regional examples of systemic policy constraints that are preventing the achievement of the goals and targets of national agriculture and food security investment plans. They also explored lessons, experiences, and evidence that countries can use to overcome these constraints and initiated a country and regional action planning process that will lead to a sustained, robust policy system in each country and the West Africa region. The Mozambique action plan is under development and will be incorporated into the implementation of the national agriculture strategy and agriculture investment plan.

Tourism and Biodiversity

SPEED's work in tourism and biodiversity focuses on helping Mozambique to realize its potential competitiveness in the sector. Tourism is widely seen as one of the most effective ways of preserving biodiversity, as market forces all pull in the same direction – consumers and providers all have an interest in preserving the natural environment and ensuring sustainable use of natural resources. In addition, tourism tends to be labor-intensive, thus providing opportunities for broad-based economic growth as well as biodiversity. The majority of SPEED's effort helps ensure a private-sector friendly **legal and regulatory regime**. An example of legal and regulatory work includes an examination of competition in aviation (Open Skies initiative), which was the main focus of SPEED's tourism and biodiversity work this quarter.

Open Skies initiative

Context. There is a worldwide trend for countries to reduce government interference and regulation in commercial air services and open the sector to competition. Mozambique is moving towards liberalizing this market, but progress has been slow. CTA wishes to better understand the impediments that may be causing this slow liberalization. Although a few attempts exist to look into the impact of liberalization on the air-transport market and synergies for development of tourism and other sectors, these studies remain too “high-level” and difficult to implement. CTA seeks concrete, specific recommendations to accelerate liberalization, highlighting the potential impact for growth in other sectors.

This quarter. A new aviation economist, Rafael Enriquez, was recruited by SPEED. He visited Mozambique. During this visit, the consultant and SPEED were able to gather significant data

and information from the airports of Mozambique and LAM, Mozambique's national-flag airline. The Tourism sector, despite the fact that they are eager to see the results of this analytical work as they believe civil aviation liberalization could trigger the development of the sector, never provided the data and information requested. The consultant was somewhat impaired to prepare his draft report by the non-existence of updated tourism data; however, he made a number of reasonable assumptions for the analysis based on available data and experience from other countries.

Results. None yet. However, policy results aiming at liberalization of civil aviation are to be determined by the consultant's report and discussions with stakeholders.

Next steps. The consultant is to prepare the first draft of the report – this draft was submitted to SPEED on 5 July 2013. SPEED has already submitted comments to the draft report and conference calls will be held with the consultant to discuss important issues that will allow the consultant to revise his draft. Once a revised draft is submitted, SPEED will share it with CTA and other key stakeholders to receive comments to the report and prepare a visit to Mozambique by the consultant. SPEED expects to bring Rafael Enriquez to Mozambique during August to present and discuss the report with the key stakeholders. A final report will be prepared afterwards by the consultant and this report will be submitted to CTA and subsequently to the government authorities. SPEED is expecting finalize this report and submit before the end of September 2013. After that, next steps may include issuing or amending legislation, training of staff and capacity building activities, among others but still to be determined jointly with CTA and authorities.

Democracy and Governance

SPEED's work on democracy and governance aims to improve **transparency** around such issues as the impending resource boom, the voice of the private sector in policy, and corporate ethics. Specifically, SPEED continues to raise the quality and level of dialogue around the country's **resource boom**, most recently regarding the newly proposed fiscal regime for extractives. This agenda item will continue to grow in importance from the democracy and governance perspective. Another key area of work includes the development of a legal framework that would formalize public participation in the policy process.

Impact of the resource boom on the economy

Context. Mozambique is rapidly transforming into a mineral resource-rich economy. Coal is already being exported from the Northern Province of Tete. Forecasts indicate that coal exports could well reach 150 million ton per year if basic transport and port infrastructure is put in place. In addition, Mozambique continues to see its natural gas potential expand every year as new

reserves are found, evaluated and confirmed. Mozambique during the decades of the 2020s and 2030s could well be among the top 10 major world exporters of natural gas, mobilizing enormous flows of foreign exchange and budget revenues from the extractives sector.

This resource boom is a tremendous opportunity for the Mozambican economy if this wealth is converted into jobs, improved human capital and institutional capacities, and development of basic infrastructure and utilities. The critical development issue for Mozambique is to sustain accelerated growth while also diversifying its economy to mitigate the possible negative impacts like the resource curse and Dutch disease. Key risks include accelerated corruption, the gradual disappearance of tradable sectors, high inflation and eventually political turmoil. Over the past few years, SPEED has been driving research and thinking in the country about the resource curse, Dutch disease, absorption capacity, exchange rate and business environment.

Earlier this fiscal year, SPEED prepared a concept note – [Extractive Industries in Mozambique](#) that discusses the challenges ahead and proposes areas where USAID/SPEED could assist through research and policy recommendations. In addition, SPEED prepared a note on [absorption capacity](#), which expands on one of the key themes in the concept note. A number of [blogs](#) have also been developed.

This quarter. This quarter SPEED focused on rapidly responding to a request from assistance from CTA to help them prepare comments to the government on the [draft mining tax law and draft petroleum tax law](#). SPEED mobilized a top expert, Professor Richard Westin to prepare detailed comments to both drafts as well as outline practices in similar countries regarding these critical and important tax laws. The main objective of these comparisons was to let Mozambique and its government and civil society learn about the most important vehicles used to maximize revenues from the non-renewable sectors in a transparent and fair manner.

In addition four blogs were prepared and posted on SPEED’s webpage. These blogs are related to (i) [the tax law for the mining and petroleum sectors](#), (ii) [maximizing the revenues from the non-renewable sectors](#), and (iii) [extractive industry and better contract negotiation](#), and (iv) [will Mozambique be Norway or Nigeria](#).

Results. The comments to both draft tax laws were submitted to the government on 15 June 2013 by CTA using the reports prepared by Prof Westin for SPEED. It is expected that these comments will give rise to a robust debate within the country on this critical topic.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
50	Mining tax law and Petroleum tax law	Policy	1. Analyzed 2. Presented for consultation

Next steps. A few small issues were found in the English translation of the [draft mining tax law](#). A revised English translation was produced and submitted to the consultant for revised comments – this revision should be submitted back to SPEED before the end of July 2013. The revised comments will be sent to CTA and, subsequently, to the government after being received by SPEED. SPEED is expecting to bring the mining and petroleum tax consultant to Mozambique to present and discuss his reports with CTA, the Tax Authority, and other key stakeholders. CTA and SPEED would also like to have one or two open-to-the-public events in which the reports should amply discussed.

Formalizing public participation in the policy process

Context. Public participation in policy making is enshrined in the Constitution of Mozambique which requires submission to the public of draft regulations for collecting suggestions before approval. However, the current process for incorporating the public’s view in the policymaking process is largely ad hoc and unsatisfactory for the private sector and civil society. In collaboration with CTA, SPEED commissioned the law firm SAL & Caldeira to draft the Act that will guide public participation in the legislative process in Mozambique. The draft Act aims to create a more transparent and participatory system for policy development and improve the formulation of laws and regulations affecting the business environment (and the public at large). The draft Act was completed in October 2012, and will be subject to a wide consultation process with the private sector and civil society.

This quarter. SPEED continued consultations with CTA and ACIS to further discuss implementation of this activity, particularly the consultation process and submission of the draft Act to the government. CTA agreed to invite other partners (Chamber of Commerce, ACIS, IESE, IPC and Sal & Caldeira) to jointly roll out the consultation process as a precursor to submitting the draft Act to the government. Stakeholders consider the Office of the Prime Minister as the most appropriate institution to receive the draft bill and take it further through required steps for consideration and approval.

Results. Once approved, this legislation will greatly enhance the private sector’s ability to influence public policy and transparency in public policy making. It is noted that this is the first Act to be proposed by the private sector to the government.

Next steps. Broaden the process of consultation across private sector and civil society and submit the draft to the government for consideration and approval.

Support to publish book on Public Probity Law

Context. In 2011, SPEED supported an [analysis of the anti-corruption package](#) under consideration by the Mozambican legislature. Three out of five elements of the package have been passed by parliament, including the Ethics Code, which is now renamed the Lei da Probidade Publica (Public Probity Law). This law, which was passed in May 2012, contains conflict of interest and declaration of assets provisions that are important for fighting corruption. SPEED supported UTREL (Legal Reform Technical Unit - a public institution subordinated to the Commission for Public Sector Reform and overseen by the Minister of Justice) to publish a book on the Public Probity Law - Annotated and Commented

This quarter. The book on the Public Probity Law was produced and dissemination across the country was concluded.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
51	Anti-corruption legislation	Admin Procedures	2. Presented for consultation
			3. Presented for legislation
			4. Passed
			5. Implementation begun

Results. 50,000 books were produced and disseminated across the country. The Public Probity Law is a very timely piece of legislation from which great things are expected insofar as it can contribute to increasing the credibility of Mozambican institutions and preserving the integrity of Mozambique's civil servants. Nevertheless, it is early yet to reach any solid conclusions on the impact the LPP will actually have.

Next steps. SPEED will consider working with UTREL to disseminate the book across the country by organizing events and workshops.

Support to Attorney General's office

Context. Following the passage of the Public Probity Law in May 2012, donors shifted their efforts toward helping the government implement the law. The Attorney General's office requested the support of a short-term consultant to assist in identifying and/or updating the financial gaps in the Attorney General's office (PGR) and the Central Office for Combating Corruption (GCCC) strategic plans, map the pledged/committed external funding, and draft a consolidated operational plan.

The consultancy produced a results tree that will guide the implementation of the PGR and GCCC strategic plans, including new anti-corruption legislation. The work will in turn eventually enable the disbursement of over \$6 million in external funding; assisting the PGR in

setting up the new bodies the legislation requires to more effectively prevent and prosecute corruption.

This quarter. The consultant assisted the PGR to develop four proposals with detailed input based budgets and to demonstrate that the envisaged (USAID & EU financed) activities would contribute to outputs and outcomes that were aligned with the PGR's Strategic Plan.

Results. The consultant has completed the requirements and the following deliverables were achieved:

1. An updated and budgeted plan;
2. Logical framework/operational plan (2012-2014) for USAID funds
3. Logical framework /operational plan (2012-2015) for EU funds
4. Proposal for an integrated (to the extent possible) financial management model/mechanism for the channeling of external funds

Next steps. USAID will need to pronounce its position and identify the instrument it wishes to apply to finance the envisaged activities at the PGR and the GCCC and the EU will need to communicate with the PGR and the GCCC on what is the road map ahead for EU financing.

MANAGEMENT AND ADMINISTRATION

IPEME local currency funds

Context. Mozambique's SME promotion institute, IPEME, received \$1.5 million from USAID in local currency funds generated from various USAID-funded activities in the past. The funds were disbursed to support a multi-year program of IPEME activities with SMEs. However IPEME's concerns about government management of the funds led them to ask SPEED to manage the funds on their behalf. SPEED drafted and signed an MOU with IPEME to outline objectives, roles and responsibilities, and as completed a parallel contract to receive and manage these funds.

This quarter. SPEED worked with IPEME staff on the procurement process for several activities and also supported IPEME on the procurement for a paper trade fair. The International Exhibition of Packaging and Printing held in June 2013 that aim to support the emergence of techniques and tools that meet the needs of small and medium enterprises to make their products more competitive.

Results. The SME portal was concluded and launched. The draft reports of marketing plan and feasibility of CTCs for Chokwe and Boane was presented to IPEME for comments.

Next steps. SPEED will continue work with IPEME to implement the current workplan assuring the timely and quality deliverables. In coordination with the EC and UNIDO, SPEED will

streamline the quality control to ensure that the procurement projects that it supports have better impact and also help IPEME to prioritize their various planned projects and determine which support instruments are best for implementing the top priorities.

USAID CDCS support

Context. The USAID Mission in Maputo is designing its five-year country strategy. The strategy process is comprehensive, covering several sectors. The Mission asked SPEED to prepare and execute scopes of work for assessments in two areas: land and extractive industries. SPEED’s role was relatively minimal on the land assessment, limited to contracting key local consultants. On the extractive industries assessment, which cuts across several sectors (ATB, health, education, governance, etc.), SPEED played a more active role in managing a larger team and re-editing the main report produced. SPEED worked with the USAID mission to extensively edit the report.

This quarter. The project was mainly dormant this quarter, working with the Mission to improve the draft.

Results. The paper has served to feed into USAID’s five-year strategy for Mozambique.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
48	Extractives Strategy for USAID	Policy	1. Analyzed
			2. Presented for consultation

Next steps. SPEED hopes to obtain approval from USAID to disseminate and communicate such significant analytical work. SPEED would also like to explore the preparation of small notes on some specific issues raised by the report as well as to have blogs on some critical issues, and recommendations.

Communication for Policy Change (C4PC) initiative

Context. The successes and failures of most policy reforms often hinge on two crucial factors: communication and people’s involvement. SPEED has been supporting private and public institutions to develop and carry-on policy reforms to improve business environment, trade and investments. Over the years, scores of recommendations have been made, but relatively few implemented; even though reforms are very much needed in Mozambique. Adoption and implementation of economic policy reforms have been too slow. SPEED realizes that no comprehensive and cohesive communication approach has been applied to support policy reform adoption and implementation. Communication messages have been ad-hoc and mostly targeted

to end-users. SPEED believes that a structured and focused communication strategy and action would contribute to improve awareness and adoption of needed economic policy reforms and would also support sustainable and successful implementation of different recommendations to address key impediments facing the business environment. Thus the C4PC is being developed to support making the actual reforms happening.

This quarter. SPEED supported by a Communication Specialist developed the strategy for C4PC published on our website ([C4PC report](#)). The strategy outlines a framework that will influence decision makers to take actions towards quicker policy-reform implementation. C4PC should guide overall stakeholder engagement to advocate and motivate implementation of on-going reforms aimed at improving the business environment. It focuses on SPEED’s supported areas of intervention, namely: business environment, resource boom and agriculture.

Results. None yet beyond analysis. However, expected deliverables will include the various media collateral and events. Key results will be increased awareness among key decision-makers and demand for policy reform among influencers and the general public. It is further expected that this initiative will accelerate a number of policy reforms, particularly those related to improving the business environment and agricultural competitiveness.

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q3
49	Communication for Policy Change	Admin Procedures	1. Analyzed

Next steps: Design and implement a multi-pronged communication campaign around a few key messages related to the resource boom, agriculture competitiveness, and business environment. A range of communication tools will be used, including targeted events (e.g., breakfast meetings), group debates, print media exposure, expert panels on TV and radio, fact sheets, posters, billboards, social media, and competitions.

ANNEX 1: CAPACITY-BUILDING ACTIVITIES AND OUTREACH

	Date	Activity	Venue	Institution	Client	Category	Participants		Subtotal
							M	F	
FY 2013 Q1	24-Oct-12	SME linkages to extractive industries though	Beira	CTA		PS, CSO	48	8	56
	25-Oct-12	SME linkages to extractive industries though	Maputo	CTA		PS, CSO	54	17	71
	19-Nov-12	Land Tenure, Property Rights, and Conflict A	Maputo	Centro Terra Viva		PS, CSO	11	8	19
	28-Nov-12	Tributacao no Sector Agricola	Maputo	CTA/ TA		PS, CSO	53	12	65
	12-Dec-12	SPEED Retreat	Catembe	SPEED		PS, CSO	23	6	29
			Subtotal				189	51	240
		Subtotal (cumulative)				189	51	240	
FY 2013 Q2	19-Feb-13	Gorongosa Mountain workshop	Indy Village	AgriFuturo		Donor	17	23	40
	8-Mar-13	CASP	Centro J Chissano	CTA		PS, CSO	802	39	841
	15-Mar-13	Streamlining Apprication Forms	Hotel Avenida	Sal & Caldeira, MIC		PS, CSO	22	11	33
	21-Mar-13	Contract Negociation Workshop	Hotel Avenida	Observatorio Mocambicano de Governacao		PS, CSO	71	14	85
	26-Mar-13	Electronic Single Window	Indy Village	ACIS		PS, CSO	39	10	49
	27-Mar-13	Electronic Single Window	Hotel Rainbow	ACIS		PS, CSO	25	4	29
	27-Mar-13	Non Fiscal Barriers	Hotel Rainbow	CTA		PS, CSO	31	8	39
		Subtotal				1,007	109	1,116	
		Subtotal (cumulative)				1,196	160	1,356	
FY 2013 Q3	28-May-13	Non Fiscal Barriers	Hotel Flamingo - Quelimane	CTA		PS, CSO	19	3	22
	28-May-13	EMAN II	Humula - Bilene	CTA, MIC		PS, CSO	21	10	31
	30-May-13	Non Fiscal Barriers	Hotel Milenio - Nampula	CTA		PS, CSO	41	8	49
	28-Jun-13	PTF- Transit within Janela Unica	Hotel Rainbow - Beira	Tax Authority		PS, CSO	48	7	55
			Subtotal				129	28	157
		Subtotal (cumulative)				1,325	188	1,513	

ANNEX 2: LIST OF DOCUMENTS PUBLISHED IN Q3 2013

SPEED Publications: Studies and Reports				
Date of Publication	Title	Author(s)	File link	Portuguese/ English
Reports				
15 Apr 2013	Pagamento de Impostos em Moçambique	Natércia V. Remane	http://www.speed-program.com/wp-content/uploads/2013/04/2013-SPEED-Report-004-Paying-Taxes-in-Mozambique-DRAFT-PT.pdf	Portuguese
29 May 2013	Elaboração de Formulários Únicos para Registo de Sociedades e Início de Actividades	Sal & Caldeira	http://www.speed-program.com/wp-content/uploads/2013/04/2013-SPEED-Report-003-Streamlining-Application-Forms-for-Starting-a-Business-PT.pdf	Portuguese
21 Jun 2013	Comments Mozambique Draft Mining Tax Law Appendix A	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-17-COMMENTS-MOZAMBIQUE-DRAFT-MINING-TAX-LAW-APPENDIX-A.pdf	English
21 Jun 2013	Comments Mozambique Draft Mining Tax Law Appendix B	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-17-COMMENTS-MOZAMBIQUE-DRAFT-MINING-TAX-LAW-APPENDIX-B.pdf	English

			APPENDIX-B.pdf	
21 Jun 2013	Comentários Tributação Actividades Mineiras Documento Principal	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-17-COMENTARIOS-TRIBUTACAO-ACTIVIDADES-MINEIRAS-Documento-principal-PT.pdf	Portuguese
21 Jun 2013	Comentários Regime Específico Tributação Operações Petrolíferas Sumário Executivo	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-18-COMENTARIOS-REGIME-ESPECIFICO-TRIBUTACAO-OPERACOES-PETROLIFERAS-Sumario-Executivo-PT.pdf	Portuguese
21 Jun 2013	Comments-Mozambique Draft Oil and Gas Tax Law Executive Summary	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-18-COMMENTS-MOZAMBIQUE-DRAFT-OIL-AND-GAS-TAX-LAW-Executive-Summary-EN.pdf	English
21 Jun 2013	Comments Mozambique Draft Oil and Gas Tax Law	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-18-COMMENTS-MOZAMBIQUE-DRAFT-OIL-AND-GAS-TAX-LAW-EN.pdf	English
21 Jun 2013	Tributação de Actividades Mineiras Sumário Executivo	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-TRIBUTACAO-ACTIVIDADES-MINEIRAS-Sumario-Executivo-PT.pdf	Portuguese
21 Jun 2013	Comments Mozambique Draft Mining Tax Law Executive Summary	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-17-COMMENTS-MOZAMBIQUE-DRAFT-MINING-TAX-LAW-Executive-	English

			Summary.pdf	
21 Jun 2013	Comments Mozambique Draft Mining Tax Law	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-17-COMMENTS-MOZAMBIQUE-DRAFT-MINING-TAX-LAW-EN.pdf	English
21 Jun 2013	Comentários Regime Específico de Tributação de Operações Petrolíferas	Prof Richard Westin	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED18-COMENTARIOS-REGIME-ESPECIFICO-TRIBUTACAO-OPERACOES-PETROLIFERAS-PT.pdf	Portuguese
21Jun 2013	Barreiras Não Fiscais ao Desenvolvimento do Sector da Agricultura em Moçambique	Hipólito Hamela e Tomas Manhicane Jr	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-Report-018-NNNon-Fiscal-Barriers-to-Agriculture-in-Mozambique-PT.pdf	Portuguese
24 Jun 2013	Communication Strategy for Policy Change (C4PC)	Irene Visser and Maria Nita Dengo	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-Report-019-C4PC.pdf	English
Presentations				
21Jun 2013	Barreiras Não Fiscais ao Desenvolvimento do Sector da Agricultura em Moçambique	Hipólito Hamela e Tomas Manhicane Jr	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-Presentation-015-Non-Fiscal-Barrires-to-Agriculture-PT-.pdf	Portuguese
24 Jun 2013	Communication Strategy for Policy Change (C4PC)	Irene Visser and Maria Nita Dengo	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-014-C4PC-Presentation.pdf	English

21Jun 2013	Barreiras Não Fiscais ao Desenvolvimento do Sector da Agricultura em Moçambique	Hipólito Hamela e Tomas Manhicane Jr		Portuguese
24 Jun 2013	Communication Strategy for Policy Change (C4PC)	Irene Visser and Maria Nita Dengo	http://www.speed-program.com/wp-content/uploads/2013/06/2013-SPEED-014-C4PC-Presentation.pdf	English

SPEED Publications: Notes, Briefs and blogs				
Date of Publication	Title	Author(s)	File link	Portuguese/English
Notes				
29 May 2013	Doing Business: Mozambique Quick-Wins	Horácio Morgado	http://www.speed-program.com/wp-content/uploads/2013/04/2013-SPEED-Note-002-Doing-Business-and-Mozambique-Quick-Wins-PT.pdf	English
Blogs				
4 Apr 2013	Janela Única – O que dizem os clientes?	Maria Nita Dengo	http://www.speed-program.com/blogs/by-author/maria-nita-dengo/janela-unica-o-que-dizem-os-clientes	Portuguese
4 Apr 2013	Estávamos nós, os economistas, a ficar sem	António Franco	http://www.speed-program.com/blogs/by-author/antonio-franco/estavamos-nos-os-economistas-a-ficar-sem-solucoes-	Portuguese

	soluções para crises bancárias?		para-crisis-bancarias	
4 Apr 2013	A busca dos campeões de reformas do ambiente de negócio	Benjamim Nandja	http://www.speed-program.com/blogs/by-author/benjamim-nandja/a-busca-dos-campeoes-de-reformas-do-ambiente-de-negocio	Portuguese
11 April 2013	Seremos Noruega ou Nigéria? Pergunta um Artigo Publicado pela BBC	António Franco	http://www.speed-program.com/blogs/by-author/antonio-franco/seremos-noruega-ou-nigeria-pergunta-um-artigo-publicado-pela-bbc	Portuguese
11 April 2013	Indústria Extractiva: Podemos ter uma melhor negociação?	Maria Nita Dengo	http://www.speed-program.com/blogs/by-author/maria-nita-dengo/industria-extractiva-podemos-ter-uma-melhor-negociacao	Portuguese
14 Apr 2013	O Elefante Branco? Pagamento de Impostos em Moçambique I	Tomas Manhicane Jr	http://www.speed-program.com/blogs/by-author/tomas-manhican-jr/o-elefante-branco-pagamento-de-impostos-em-mocambique-i	Portuguese
18 Apr	Banco Nacional de Investimento? Será que vamos repetir a experiencia com o BPD – Banco Popular de Desenvolvimento?	António Franco	http://www.speed-program.com/blogs/by-author/antonio-franco/banco-nacional-de-investimento-sera-que-vamos-repetir-a-experiencia-com-o-bpd-banco-popular-de-desenvolvimento	Portuguese
6 May 2013	Maximização de receitas do sector dos recursos não-renováveis	António Franco	http://www.speed-program.com/blogs/by-author/antonio-franco/maximizacao-de-receitas-do-sector-dos-recursos-nao-renovaveis	Portuguese

21 May 2013	As PPPs em Mocambique – Uma solução para a eficiência dos serviços públicos?	Benjamim Nandja	http://www.speed-program.com/blogs/by-author/benjamim-nandja/as-ppps-em-mocambique-uma-solucao-para-a-eficiencia-dos-servicos-publicos	Portuguese
24 Jun 2013	Criação de Emprego e a Lei de Trabalho	António Franco	http://www.speed-program.com/blogs/by-author/antonio-franco/criacao-de-emprego-e-a-lei-de-trabalho-2	Portuguese
28 Jun 2013	Regimes Específicos de Tributação da Actividade Mineira e Petrolífera	António Franco	http://www.speed-program.com/blogs/by-author/antonio-franco/regimes-especificos-de-tributacao-da-actividade-mineira-e-petrolifera	Portuguese

ANNEX 3: SUMMARY SITT TABLE

SITT #	SITT Name	Legal Instrument	Stages Achieved this quarter FY2013 Q2
6	Insolvency law	Policy	4. Passed
9	Competition law	Policy	4. Passed
21	EIT policy	Policy	5. Implementation begun
35	International trade website	Admin Procedures	2. Presented for consultation
			3. Presented for legislation
			4. Passed
36	Single Electronic Window procedures	Admin Procedures	2. Presented for consultation
			3. Presented for legislation
37	Tax payments procedures	Admin Procedures	1. Analyzed
38	Open skies	Policy	1. Analyzed
40	Streamlining application forms for starting a business	Regulation	1. Analyzed
			2. Presented for consultation
41	Agriculture policy commitments under the New Alliance	Policy	5. Implementation begun
43	Non-tax barriers to agriculture	Policy	1. Analyzed
			2. Presented for consultation
44	Streamlining business registration	Admin Procedures	1. Analyzed
			4. Passed