

Agricultural Policy Implementation Project

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ANNUAL WORK PLAN YEAR III

FEBRUARY 1990

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Agricultural Policy Implementation Project
APIP

ANNUAL WORK PLAN
YEAR III

February 1990

Republic of Tunisia
Ministry of Agriculture
General Directorate for Planning and Agricultural Investment

Prime Contractor:
Abt Associates Inc.

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Institut Supérieur de Gestion
Ithaca International Ltd.
University of Wisconsin

Contract No. 664-0343-C-00-8016-00
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Agricultural Policy Implementation Project
APIP

Year Three Annual Activity Work Plan

1.0 INTRODUCTION

Abt Associates Inc. and its subcontractors -- the Institut Supérieur de Gestion; Ithaca International Limited; and the University of Wisconsin -- and the Ministry of Agriculture's General Directorate for Development Planning and Agricultural Investment (DGPDI) are pleased to submit this Third Year Annual Work Plan for the Agricultural Policy Implementation Project (APIP) under USAID Contract No. 664-0343-C-00-8016-00. The period covered by this Work Plan is January 1, 1990 to December 31, 1990.

The Work Plan for APIP's third year contains five sections. Following this introduction, Section 2 presents a brief summary of activities undertaken during Year II. Descriptions of these activities are found in Annex A (Sections 6 and 7) at the end of the Work Plan. Ongoing activities and new activities to begin during the third year are covered in Section 3. The fourth section contains a summary of training activities and proposals for the remainder of the Project. Section 5 discusses some administrative issues.

The purpose of this draft Work Plan is to summarize past work and to set priorities for work to be done in Year III. The priorities for the first six months of 1990 are addressed and a tentative list for the remainder of the year established.

Major accomplishments during Year II included:

- o Final reports for 11 studies were delivered to the Government of Tunisia and USAID;
- o Seven additional draft reports were delivered.
- o A seminar presenting results of APIP studies was attended by about 150 people from government, private agribusiness and the academic community;
- o Seminar proceedings containing 9 papers were edited and are being printed;
- o A new management structure was put in place, with Cheri Rassas as Resident Representative in Tunis, Mark Newman as Project Director and Charles Stathacos as Contract Manager.

- o The Abt APIP prime contract was modified to provide for increased follow-up activities aimed at improving dissemination of study results and follow through to support design and implementation of policy measures using results of technical studies to be produced under the project;

- o A mid-term evaluation of APIP was conducted.

2.0 YEAR II - SUMMARY OF APIP ACTIVITIES

Figure 1 illustrates the schedule and status of activities during APIP's second year. During the first half of the year Abt Associates, ISG, Ithaca International and the University of Wisconsin, together with colleagues in the Government of Tunisia finalized five reports: the three-part Subsidy Reduction Study for fertilizer, herbicides, and seeds; analysis of Fertilizer Distribution and On-Farm Use; and three two-part Product Competitiveness and Export Marketing studies for olive oil, wine, and citrus.

Studies completed in draft and circulated for review during the second half of the year included the Dairy Processing Case Study and a study of competitiveness and export marketing prospects for dates. A large study of the Caisse de Compensation was initiated in August and the final report is due early 1990. In addition, a simple econometric model of Tunisian agriculture was developed and working papers drafted on "Structural Change and Yield Response in Tunisia's Cereals Sector" and "Input and Commodity Price Policy Interventions under Alternative Drought Scenarios in Tunisia: A Crop Budgeting Analysis."

Studies conducted under the Project but outside of Abt Associates' APIP contract during 1989 included "A Master Plan for the Commercialisation of Blended Oils" prepared by Comete Engineering and "A Plan of Action for Tunisia's Cereals Sector" prepared by Abt Associates and Deloitte Haskins and Sells under a buy-in to the Agricultural Marketing Improvement Strategies (AMIS) Project. A second phase study in support of Tunisia's Grain Policy Reform Program was initiated in September and will be finalized at the end of 1990. A contract for the Transport Equalization System was signed and initial work began at the end of December 1989. In each case, Abt Associates' APIP office has provided some logistical and technical support for the studies.

For descriptions of studies submitted and/or finalized during Year II, see Annex A.

APIP Activities - Year II (1989)
Description and Status of Activities

Figure I

ECONOMIC ANALYSES:		TYPE OF TECH. ASSISTANCE	TYPE OF TRAINING	CONTRACTOR	OTHER PARTICIPATION	PERSONNEL	STATUS in 1989
1.	Reduction of Subsidies for Agricultural Inputs: Impact on the Demand for Inputs and Supply of Output. Three-part study examines a) subsidy policy and use of subsidized inputs; b) impact of elimination of subsidies on farmer incomes & production; and c) impact of subsidy elimination on demand for subsidized inputs and supply of corresponding products.	data analysis	on-the-job weekly seminars by APIP team	Abt ISG	Alrouf Chouchane Ouertani Hzoughi	Redjeb Lahouel P. Bloch	Final - March
2.	The Possibilities for Improving the Marketing of Chemical Fertilizers and Their Use On Farm. Identifies constraints to private sector participation and efficient distribution. Recommends gradual government disengagement, revitalization of distribution channels to enhance services to farmer, encourage storage, increase supply and reduce distribution costs.	economic & agro- nomic analysis	on-the-job	Abt	A. Khaldi, Chaffai M. Gair CHEA	Heureux Rondia Bachta	Final - February
3.	Dairy Processing Case Study Key problems for policy reform are identified and analyzed. A variety of options and phasing schedule is proposed for reducing subsidies.	economic analysis	on-the-job	Ithaca ISG	A. Chouchane M. Gair	Eriksen G. Christensen G. Sullivan B. Mehri	Draft July 31 Reviewed by GOT. Waiting for final.
4.	Export Commodity Study - Dates. (DRAFT) Industry found to be highly competitive but attention should be paid to quality and price issues to assure continued development of market. Report includes a strategic marketing plan to expand date exports.	economic analysis	on-the-job	Ithaca	Chaffai, DGP/DIA Belaifa, GID R'Houma, INRAT	J. Eriksen King Carpenter G. Christensen	Draft November. Waiting for French translation.
5.	Master Plan for the Commercialisation of Oils. An operational Action Plan recommends ways to increase efficiency of processing imported and local vegetable oil to: a) economize on EEC oil subsidies; b) eliminate waste in oil mixing; and c) place larger variety of oils on the market.	In-country economic analysis		Comete	A. Khaldi, DGP/DIA Chaffai, DGP/DIA Rouissi, ONH	R. Meddeb Mme Bacchus	Final - August
6.	A Plan of Action for Tunisia's Cereals Sector: First Phase Report. An Action Plan for public and private sector assembly, imports and marketing recommends: a) measures to free market operations and encourage investment; b) ways to refine the role of the OC; and c) measures affecting OC and other GOT responsibilities and expenditures.	in-country economic analysis	on-the-job	Abt/AMIS DH&S	Ben Amar, DGP/DIA	M. Nennant J. Ladd M. Boughzala	Final - May

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APIP Activities - Year II
Description and Status of Activities

Figure I (continued)

ECONOMIC ANALYSES:		TYPE OF TECH. ASSISTANCE	TYPE OF TRAINING	CONTRACTOR	OTHER PARTICIPATION	PERSONNEL	STATUS in 1989
7.	<p>Seminar on Agricultural Structural Adjustment</p> <p>Agricultural structural adjustment in general and results of APIP's studies were presented in themes: 1) structural adjustment; 2) export growth; competitiveness and export markets for ag. products; 3) subsidy reductions: impact on supply and demand; and 4) role of public and private sectors.</p>	General context and presentation of studies conducted		Abt Ithaca Wisconsin ISG	R. Meddeb E. Berg	Consultants DGPDA	Seminar Proceedings being printed for distribution.
8.	<p>Structural Change and Yield Response in Tunisia's Cereals Sector (Modeling Activity)</p> <p>Various analytical techniques used to explain changes in production for durum wheat, bread wheat and barley over time.</p>	development of time series data base - TSP	on-the-job	Wisconsin	Groupe de Travail A. Mecherqui H. Larbi M. Bel Haj	P. Kristjanson M. Roth	November - Draft.
9.	<p>An Econometric Model of Tunisian Agriculture (Modeling Activity)</p> <p>An econometric based on annual data from 1971 - 1988 consists of five outputs - cereals, fruits, vegetables, livestock, & other crops) and two inputs (variable inputs - fertilizers, chemicals - and other inputs) looks at variation of response to changing market conditions.</p>	econometric analysis model of supply and demand functions	on-the-job	Wisconsin	Groupe de Travail	J. P. Chavas	November - Draft.
10.	<p>Input and Commodity Price Policy Interventions Under Alternative Drought Scenarios in Tunisia: A Crop Budgeting Analysis. (Modeling Activity)</p> <p>The Enquete Conjoncture and Enquete de Base are used to construct crop budget models for five economic regions and evaluate the impact of subsidy removal under three states of rainfall.</p>	data assembly crop budgeting	on-the-job	Wisconsin INAT	Groupe de Travail	M. Roth P. Bloch C. Walker	December - Draft.
11.	<p>Creation of an Agricultural Data Bank - Preliminary Report. (Modeling Activity)</p> <p>Chronological series of existing data for Tunisian agriculture has been computerized on QUATTRO and LOTUS 123.</p>		on-the-job	Wisconsin	Groupe de Travail	P. Kristjanson M. Roth	April
12.	<p>Analysis of the Caisse General de Compensation (Subsidy Fund). Phase I Draft</p> <p>Critical economic, institutional and social analysis of the current subsidy system for basic foods (cereals, oil, milk, sugar), its budgetary and distributional implications.</p>	economic analysis institutional analysis		Abt ISG	S. Mathloul, DPCE R. Touiti, DPCE A. Chaffai, DGPDA Cabinet de Perspectives Sociales	Redjeb M. Lahouel M. Boughzala C. Manoughli Hernassi A. Medinegh	November - Draft

3.0 YEAR III - GOALS AND OBJECTIVES

During the third year of the project we intend to continue with economic analyses to support the GOT's agricultural structural adjustment program. These are discussed in further detail in 3.1 below. Policy recommendations generated from APIP studies will serve as input in developing government action plans for discussion and follow-up. More emphasis will be placed on dissemination of information already obtained during the course of APIP and of new information resulting from ongoing technical activities. Workshops, seminars and technical notes will contribute to policy discussions. An improved system of monitoring and evaluating policy impacts of ASAL activities is to be developed. The modeling activity within the DGPDIA will be accelerated and strengthened in order to provide decision-makers with timely analysis of impacts of policy options on farmers' income and production.

3.1 Year III - Ongoing and New Technical Studies and Activities proposed

During the first six months of 1990 a number of studies initiated in 1989 will be finalized and other new studies will begin. Figure 2 shows a matrix of work to be carried out and the following text provides brief descriptions.

3.1.1 Cereals Marketing Master Plan

This activity is the second phase of a contribution to Tunisia's Cereal Marketing Master Plan. The objective of this study is to respond to GOT requests for support in developing a consistent plan for both local and imported cereal products (including assembly, import, storage and distribution). The aim is to improve the operations of the system, including removal of constraints to private sector participation, and definition of a role for the Office des Cereales (OC) that permits it to operate as an effective regulator of the subsector. Preliminary work was begun in late 1989 on grain assembly and storage costs.

This study is being carried out under by Abt Associates under a buy-in to the Agricultural Marketing Improvement Strategies (AMIS) project. Mr. Bechir Rassas provided an analysis of historical assembly and storage costs of cooperatives. Dr. Mark Newman and Ms. Jo Anne Cohn, M.B.A. are preparing an economic and financial analysis of potential costs of new storage facilities that the GOT estimates are required - including the attractiveness of investments in storage facilities at the farm, mill, and port level under current and alternative storage and handling margins, import duties and investment provisions. The chef de file at the DGPDIA is Badr Ben Ammar.

Figure 2

APIP Schedule of Activities - Year III (1990)
Ongoing Studies

ECONOMIC ANALYSES	TYPE OF TECHNICAL ASSISTANCE	TYPE OF TRAINING	CONTRACTOR	OTHER PARTICIPATION	PROPOSED TIMING - 1990	PROPOSED PERSONNEL	COMMENTS
1. Cereals Marketing Master Plan - Second phase study develop a consistent plan for both local and imported cereal products which would improve the functioning of existing system.	economic analysis	on-the-job	Abt/ANIS	Ben Amar, DGPDA Khalidi OC		M. Newant	Various trips throughout the year.
2. CGC Study - Phase II - different means of reducing costs of subsidies, including targeting food products, optimizing costs and increasing prices will be examined, keeping in mind the nutritional status of the most needy.	economic and social analysis		Abt ISS	O.C. DPCE, Touiti DGPDA, Chaffai	March	Redjeb Lahouel Boughzala Manoghli Abdessalem	
3. Modeling Activities - development and refinement of public and private sector farm models for North-west regions to look at effect of price variation of inputs and outputs to analyze impact of ag. policies on farmer behavior.	data analysis surveys	on-the-job INZi	INAT Wisconsin	Larbi, DGPDA Mecherqui, Ghomaa Bel Haj	first semester	B. Thabet A. Selmi M. Roth	
4. Drought Strategy - identification of measures to be taken in response to frequent and severe droughts in Tunisia.	economic analysis models	on-the-job		Boudali, DGPDA H. Larbi U. of Wisconsin	January 29	Stan Johnson Ludo Peeters	Four trips through June 1990.
5. Transport Cost Equalization Study - evaluation of current system for cereals. Recommend options for a more efficient system.	economic & institutional analysis	on-the-job	SIDES	A. Khalidi, DGPDA H. Larbi, DGPDA Ben Hassan, OC CCGC, COCEBLE	April		

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Priority List of Studies To Be Carried Out Under APIP

ECONOMIC ANALYSES	TYPE OF TECHNICAL ASSISTANCE	TYPE OF TRAINING	CONTRACTOR	OTHER PARTICIPATION	PROPOSED TIMING - 1990	PROPOSED PERSONNEL COMMENTS
6. Subsidy Reduction and Liberalization of Animal Feed - examine impact on farmers' revenue, and the supply and demand for animal feed. Development of an Action Plan with steps to be taken.	data analysis Action Plan	on-the-job	to be determined	Chouchane, DGPDI Gmir DG/PA DEC DPCE	Begin March	TOR drafted. To be reviewed.
7. Action Plan for Liberalization of Meat Imports	economic analysis	on-the-job	to be determined	Daraoul, DPCE Khaldi, DGPDI Chouchane, DGPDI DG/PA Ellouhoum		
8. Marketing Study on Targeted Products for the Caisse de Compensation (Subsidy Fund)	product testing	on-the-job	to be determined	DPCE		Waiting for results from CGC study.
9. Marge de Panification	economic analysis			Daraoul, DPCE OC		
10. Subsidy Reduction - Irrigation Water - examine impact on farmers' income and production.	data analysis	on-the-job weekly by APIP team	to be determined	Larbi, DGPDI Boudali DG/GR DG/EGTH		TOR drafted. To be reviewed.
11. Agricultural and agro-industrial taxation and analysis of incentives for agricultural investments.	economic analysis			M'nasri, DGPDI Mansour, DGPDI Daheane, DGPDI DG/Budget M/Plan		
12. Modeling tools for monitoring prices of fresh agricultural products (fruits and vegetables)	data collection modeling	on-the-job weekly by APIP team	to be determined			
13. Export Promotion of New Agricultural Products						
14. Project Monitoring - implementation of a computerized system for review, evaluation and monitoring of project and program results and impacts.	data analysis	on-the-job weekly seminars	to be determined	Afsa, DGPDI Khaldi Marrouki		TOR waiting for USAID.
15. APIP Seminar						

All economic analysis activities performed in collaboration with DGPDI working groups.

2/Jan/90

>Caletud\lotus

CALENDRIER DES ETUDES ET REPARTITION DES GROUPES

ETUDE	Technique de modélisation	Caisse de Compensation Phase II	Rationalisation Collecte des céréales Phase II	Péréquation de transport	Stratégie Sécheresse	Elimination de la subv. Alia. bétail	Processus de libéralisation de l'importation viande bovine	Marketing des Produits Cibles pour la CGC	Marge de Panification	Reduction de la subv. eaux irriguées	Fiscalite et Investissements Agricoles	Promotion de l'exportation de nouveaux produits	Modelisation des produits agricoles frais	Suivi Evaluation
CHEF DE FILE	Handi	Youiti	Ben Anwar	Khaldi	Boudali	Resgui, OC	DG/PA	DPCE	OC	Handi	M'nasri	DG/PDIA	DPCE	Afsa
GROUPE DE TRAVAIL	Bel Haj Mechergui Ghonnam	Chaffai	Khaldi	Handi	Khaldi	Chouchane M. Geir	Khaldi Chouchane			J. Boudali	Mae Mansour F. Dahane			Khaldi Goudri Marrouki
AUTRES ORGANISMES		DPCE OC	O.C COCEBLE	OC	OC	DG/PA	S.MV		DPCE	DG/GR DG/EGTH	DG/Budget R/Plan			DG/Projet R/Plan
	INAT	DGPDIA	CCGC DPCE	CCGC COCEBLE		OC DPCE	Elouhoum DPCE							

Calendrier de l'étude - 1990

Mars	-----
Avril	-----
Mai	-----
Juin	-----
Juillet	-----
Août	-----
Septembre	-----
Octobre	-----
Novembre	-----
Décembre	-----
Janvier 91	-----
Février 91	-----

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3.1.2 Caisse de Compensation (Subsidy Fund)

A two-phase study of the Caisse Generale de Compensation (Subsidy Fund) was initiated in August 1989. The first-phase report provides a critical economic, institutional and social analysis of the current subsidy system for basic foods (cereals, oil, milk, sugar), its budgetary and distributional implications. Although the Caisse does provide some redistribution of income, estimates of the distribution of costs and benefits of subsidies by income levels show that the actual system is not very cost effective in increasing the welfare of the poor. The study identifies a number of policy options for further examination including, changes in price policy, and increased subsidy targetting in order to reach the most needy social groups. An evaluation of the present system examines advantages and disadvantages, identifies inefficiencies and suggests measures for improvement. A working paper presenting preliminary findings is being circulated.

The second phase study will focus on options for improving the efficiency of the Caisse and reducing subsidy costs. It will provide estimates of potential cost savings by subsector (bread wheat (ble tendre), oil, milk) based on new strategies. Different means of reducing costs of subsidies, including targeting food products, transferring income to disadvantaged groups and increasing prices will be examined keeping in mind the nutritional status of the most needy. A review of existing social programs in Tunisia and targeted programs in other countries will also provide insights to GOT decision-makers.

In addition, a social survey initiated in November by Cabinet de Prospective Sociale (CPS) under a contract with Abt Associates will provide information on a) how different socio-economic groups perceive the role of the government in the subsidy programs; b) perceptions of who benefits, who pays; c) reactions to levels of price increases; and d) reactions to a variety of options of targeted food policies.

Both phases of the study are being implemented by Abt Associates and ISG consultants with coordination by the DPCE. The final report is expected in March 1990. Drs. Mohamed Salah Rejeb, Mongi Boughzala, Chokri Mamoughli, Eoubaker Thabet, and Mohamed Lahouel are participating in the study, with major contributions by Slaheddine Makhlouf and Ridha Touiti of DPCE.

Support for examination of international experience with subsidy targeting options and their implications for Tunisia has been provided by the Academy for Educational Development through a consultancy by Dr. Carol Kramer funded by AID/PPC in Washington.

3.1.3 Policy Modeling Activities

Agricultural policy analysis in Tunisia can benefit from access to a broader range of conceptual frameworks and analytical tools for assessing impacts of policy change. One objective of the modeling activity is to increase the use of applied quantitative techniques for policy analysis. To date a small econometric model of Tunisian agriculture has been developed and mathematical programming models of selected farm enterprises are being developed.

In-country training is being provided in the areas of economic analysis, modeling and applied agricultural policy analysis. The process of economic modeling itself improves technicians' understanding of the structure and inter-relationships of a farm or sub-sector. The model provides a framework for analyzing policy options, either the effect of the policies already implemented or the effects of proposed policies the GOT may be considering. The ultimate objective is to provide a timely flow of economic information to decision makers, and in the process of constructing models, to improve technicians' understanding of the workings of the farm sub-sector.

The University of Wisconsin and two professors from INAT have been assisting the working group within the DGPDIA, Mr. Hamdi Larbi, Mosbah Bel Haj, Mr. Tahar Ghomam, Mr. Lokmane Zaibit and Ms. Ayda Mechergui to formulate and analyze models based on existing data.

A tentative timetable and work plan (Figure 3) for the next six months was put together with the National Agronomic Institute (INAT), the DGPDIA working group staff and the University of Wisconsin in December 1989. The group will be working first on a public sector farm model after conducting farm-level surveys in the Northwest to complement their existing data base. The model will look at the effect of price variation of inputs and outputs in order to analyze the impact of agricultural policies implemented under the Agricultural Structural Adjustment Program (ASAP) on farmer behavior. The second stage will be to develop a private sector farm model for the Northwest region. A model combining public and private sectors will be developed by members of the working group in the U.S. under the supervision of U. of Wisconsin staff.

A contract between the Ministry of Agriculture and INAT was signed in the Fall of 1989 for a period of one year. This contract provides assistance through the participation of Dr. Ali Selmi and Dr. Boubaker Thabet in the modeling activity which analyses farmer behavior.

Figure 3.

MINISTÈRE DE L'AGRICULTURE
DGPOIA

PROGRAMME DE TRAVAIL DU GROUPE MODELISATION DGPOIA

	Janvier	Fevrier	Mars	Avril	Mai	Juin	Responsabilité
I- Modèles Secteur Public							
- collecte de données	■						DGPOIA + INAT
- affinement du modèle		■					DGPOIA + INAT
- étude de sensibilité		■	■				DGPOIA + INAT
II- Modèle Secteur Privé							
- élaboration modèle général		■	■				DGPOIA + INAT
- typologie des exploitations			■	■			DGPOIA + Spécialiste
- modèle global (privé+public)			■	■			DGPOIA + WISCONSIN (aux USA)
- désagrégation du modèle général au secteur privé				■	■		DGPOIA + INAT + WISCONSIN
- enquêtes complémentaires					■	■	DGPOIA
III- Formation	X X	X X	X X	X X	X X		

3.1.4 Drought Management Strategy

The purpose of this study is to provide an analytical system to the GOT for a) better understanding the linkages of yield variability and production levels to weather conditions (rainfall); b) incorporating weather conditioned supply response in estimating aggregate domestic production levels; c) merging domestic production estimates with information on import market conditions; and d) estimating and evaluating alternative storage and purchasing strategies designed to minimize government outlays for achieving a balance in annual supply and demand. The analytical system will reside on available secondary domestic and international data bases and utilize modeling and estimation methods that can be easily transferred to the responsible agents in the GOT. A training program and two workshops will be included for this purpose.

This study will be conducted and contracted through MIAC but will be supported by APIP and staff. Dr. Stan Johnson will conduct the study beginning January 1990. Four trips will be required during the first half of 1990. Mr. Hamdi Larbi, DGPDIA, will work with Dr. Johnson, and the University of Wisconsin efforts should also provide a strong linkage.

3.1.5 Transport Cost Equalization Study

Under the current system, taxes and subsidies are used to equalize the price of a range of cereal products to consumers regardless of their distance from the zone of production or import. The objective of this study is to analyze and evaluate the current system of equalization of transport costs for cereals in order to recommend options for a more efficient system. The team will also be looking at the option of eliminating the system.

This study has been contracted to SIDES and is due early April. The main contact will be Mr. Tahar Ben Hassan, Office des Cereales, who will work closely with the SIDES team and the working group consisting of Mr. Mafteh, DPCE, and Mr. Hamdi and Khaldi, DGPDIA.

3.2 List of APIP Priorities for 1990

Additional studies and activities have been proposed to begin in the second semester of 1990. Timing and implementation will be a function of a combination of priorities discussed at the March planning meeting and resource availability through APIP and other funding sources.

3.2.1 Subsidy Reduction and Liberalization of Imports for Animal Feed

This study will examine the impact of subsidy reduction and import liberalization of animal feed on farmers' revenue, and the supply and demand for animal feed.

Terms of Reference are being drafted by DGPDI staff. The chef de file is Amor Chouchane, DGPDI. This study should begin early 1990.

3.2.2 Action Plan for Liberalization of Meat Imports

3.2.3 Marketing Study on Targeted Products for the Caisse de Compensation (Subsidy Fund)

3.2.4 Bread Manufacturing Margins

3.2.5 Subsidy Reduction - Irrigation Water

This study will examine the impact of reducing subsidies of irrigation water on farmers' income and production.

Terms of Reference will be drafted in early 1990. This study may also begin during the first semester of 1990.

3.2.6 Agricultural and Agribusiness Taxation and Analysis of Incentives for Agricultural Investments.

3.2.7 Modeling Tools for Monitoring Prices of Fresh Agricultural Products (fruits and vegetables)

3.2.8 Export Promotion of New Agricultural Products

3.2.9 Project Monitoring

The DGPDI is responsible for monitoring and evaluating GOT donor-financed agricultural development projects and programs. This activity proposes to evaluate and recommend improvements to the actual system used to collect information about various projects, to set up a computerized system with a well-planned implementation schedule assuring regular review and evaluation of project and program results and impacts, and to establish procedures that make final results accessible to decision makers.

Terms of Reference have been drafted and are being reviewed. This activity is scheduled to begin early 1990. The chef de file is Mr. Afsa, DGPDI.

3.2.10 APIP Seminar

A widely attended two-day seminar was held at the Hotel Abou Nawas in Gammarth in May 1989. The purpose of the seminar was to provide a forum for both public and private sector participants in the agricultural sector to discuss the impacts of the agricultural structural adjustment program in general and in the context of Tunisia. Results of APIP's completed studies were presented and discussed through four themes: 1) structural adjustment; 2) export growth: competitiveness and export markets for agricultural products; 3) subsidy reductions: impact on supply and demand; and 4) the role of the public and private sectors in the markets for agricultural products.

A follow-up seminar is proposed for late 1990. The program would include a combination of APIP results that support critical issues that face Tunisia as part of its structural adjustment program and international experience that is relevant to Tunisian policy discussions. The program could include sessions on: 1) The policy environment for economic reform; 2) agribusiness opportunities and constraints; 3) subsidy program impacts - options for cost reduction and targeting - including the Tunisian situation and relevant experience from other countries.

With sufficient lead time for planning and publicity, the seminar could attract a broad enough international audience to permit other countries to both share their experiences and learn from Tunisian experience.

4.0 TRAINING

Identification of formal and informal training needs has been led by Abdelhakim Khaldi, APIP Coordinator in the Ministry of Agriculture. This section provides a summary of APIP training to date, both overseas and in Tunisia, and discusses proposed training and specific courses to be offered over the remainder of the project.

4.1 Summary of Training to Date

As of December, 1989 ten (10) staff from various ministries have participated in training programs in the U.S. and fifty (50) in training programs in Tunisia. Figure 4 summarizes the training attended in the U.S. and in Tunisia since the beginning of the Project. An updated implementation plan which prioritizes and quantifies actual training courses, participants and costs and identifies individuals, firms and training institutions to carry out the plan will be drafted over the next few months.

Figure 4
1/3/90

SUMMARY OF APIP TRAINING TO DATE

Training Course	Participants	
	1988	1989
<u>Programs in U.S.</u>		
Francophone Devel. Mngmt Seminar	1 DGPDIA	
Economic Development Seminar	2 DGPDIA	1 DGPDIA 1 MOA
Statistical Methods	1 DGPDIA	
Project Management		1 DGPDIA
Strategies & Tech. of Privatization		1 MOP
Univ. of Wisconsin - on-the-job		2 DGPDIA
<u>Programs in Tunisia</u>		
Lotus 123	15 DGPDIA 3 DPCE	
Modeling & Forecasting		8 DGPDIA
Operations Research Methods		5 DGPDIA
Beginning English	14 MOA & MONE	
INAT Contract		5 DGPDIA

4.2 Proposed Types of Training for Year III

Approximately 55% of the training funds budgeted remain. Types of training which have been proposed include:

1. Computer training - introductory and intermediate levels
2. Quantitative Tools for Decision-Making - linear programming and econometrics
3. Economic Policy and Techniques for Planning
4. Evaluation and Project Monitoring
5. English - elementary and intermediate

4.2.1 Specific in-country courses proposed include:

1. Economics of Food and Agricultural Policy (January - April). This course is designed to strengthen analytical and economic skills at policy analysis based on price and market theory. Staff will be presented with the theory of economic analysis, based on supply and demand schedules. This theory will then be used to explain such phenomena as the impact of input subsidies, price and food stamp programs, nominal and effective rates of protection. Propose one class every two weeks.

2. Applications of Simultaneous Equations Methods for Economic Analysis (May). This course, following a course in econometrics, is aimed at strengthening the skills in simultaneous equation methods where interdependencies exist among equations. Propose 3-5 classes to be given in Tunisia by Dr. Jean-Paul Chavas.

3. Project Cost-Benefit Analysis (September - December). This course is proposed to strengthen the understanding of the theory of welfare analysis and the application of project evaluation techniques. This course would also deal with principles of compensation, producer surplus, consumer surplus, and income gains, losses and transfers from policy change. Various techniques to measure project benefits and costs (financial prices, economic prices, shadow prices) and techniques of project selection will be introduced.

4.2.2 Specific courses available in the U.S.

1. A variety of seminars at Atlantic Management Institute will be held in French. Several courses in computer applications to project management are offered throughout the year. These courses are four to six weeks in length.

2. The Academy for Educational Development offers a course in microcomputer tools for project analysis, implementation and monitoring. This course is offered in English only. (August 6 - Sept. 14)

5.0 ISSUES AND RESOLUTION

Following are a few, mostly resolved issues.

5.1 Translations.

Both drafts and final reports will be translated into French. (No issue has been brought up about draft documents being translated into English and to date only final drafts have been translated into English). APIP will try again to find translators or a translating service in-country to speed up the lag in receiving translations. Abt has been responsible for translating documents which have been submitted under the Abt prime contract. There is an issue about translation responsibility for reports done through other contracts with APIP resources. For new studies done outside Abt's funds, it is proposed that each contract specify and budget for translation.

5.2 Photocopying.

APIP has used the copying machine in the DGPDI library since the beginning of the Project. Although we appreciate the responsiveness of the library staff in filling the project's copying needs, large amounts of photocopying put a strain on the system. The APIP project office has now purchased a photocopying machine which will allow large and multiple copies of documents to be reproduced in Tunisia (these copies had previously been produced in the U.S. and shipped out). There are some minor difficulties with different paper size and the Project will have some covers printed in Tunisia to conform to the size paper used for copies here. Given the importance of wide dissemination of project findings, and limited resources for production of copies, a system of cost recovery is going to be implemented, so that an inventory of reports can be readily available.

5.3 Electronic Mail.

Phone calls and faxes to the U.S.-based project office and subcontractors have been costly and time-consuming. In an effort to communicate more efficiently, a system of electronic mail has recently been provided to the Project with the assistance of IRSIT. Up to 28 files can be sent through a phone call at one time. Comments on reports, agendas, translations, etc. can be communicated from one computer to another so that no retyping will be required. Abt's subcontractors will be tied to the same system.

5.4 Final Technical Reports and Working Papers.

When is a document final? There continues to be a large gap in time from when a draft is submitted to when it can be finalized and distributed. Part of the problem stems from lag time in getting documents translated. Review of drafts, however, needs to take place on a more timely basis so that the information slated to reach decision-makers arrives before policy decisions have been made.

In order to facilitate review and discussion of preliminary results of studies that have not received formal review by the government, draft reports will henceforth be circulated with covers indicating that they are APIP Working Papers. Cover pages will note that the documents are not yet official and represent draft results being circulated for review purposes. Once documents have been reviewed by the government and authors have had a chance to revise them, they will be printed as APIP Technical Reports. As noted above, a cost recovery system is being introduced to assure that budget resources do not limit document dissemination.

ANNEX A

6.0 SUMMARY OF YEAR II TECHNICAL STUDIES

6.1 Dairy Processing Case Study

This study was initiated at the end of Year I and the draft report was submitted in July 1989 by Ithaca International Limited. The report analyzes five milk collection systems, four of which are government-operated and/or financed. The second major concentration is on dairy product processing involving 32 private and two parastatal dairy processors (STIL and TUNISIE LAIT). Key problems which should be targets for policy reform are identified and analyzed. A preliminary timetable is proposed. Between the extremes of continuing the GOT's current policy and phasing out all subsidies for reconstituted milk, the report presents a range of options which permit policy makers to choose between reducing the level of government subsidy payments and increasing retail prices to consumers.

This study was carried out by team leader, John Eriksen, Ithaca International, Ltd. with the participation of Gregory Sullivan, Garry Christensen and William Lesser, Ithaca International, and Boubaker Mehri, ISG. The chef de file was Amor Chouchane and working group participant was Nadia Gmir. This report has been reviewed by the GOT and a final report is expected at the end of January, 1990.

6.2 Dates Competitiveness and Export Marketing Study

This report examines the competitive position of Tunisian dates, with special emphasis on markets in the European Community. The report finds no major structural or government policy impediments to the continued successful development of the date export industry, although it underscores the importance of self-regulation to preserve the traditional high-quality image of Tunisia's deglet-nour dates. The industry, due to a deliberate government policy of market liberalization and deemphasis of parastatal involvement, is highly competitive and fully integrated with the international market system. Exporters sell their dates in every major international market for high quality dates. However, inadequate attention to regulating product quality, recent disregard on the part of some exporters for GOT's minimum export price system, and a failure to adjust quickly to changes in the structure of international markets threaten Tunisia's market for high quality dessert dates. The report recommends attention be paid to these issues and presents a strategic marketing plan to expand date exports.

This draft report was submitted in English in November 1989. The draft translation is scheduled for January at which time it will be reviewed by the GOT, GID and other concerned private sector participants. The study was conducted by John Carpenter, Garry Christensen, Salvatore Dina, John Eriksen, and Jack King, Jr. of Ithaca International, Ltd., Abdel Rachman Chaffai, DGPDIA, Hachem Belaifa, GID, Abdelmajid R'houma, INRAT.

6.3 Master Plan for the Commercialisation of Oils

The two-phase study report presents a descriptive analysis of the operational and financial situation of supply and demand in the oil sector and evaluates weaknesses within the sector. Bid specifications of the Office of Olive Oil are evaluated in order to define conditions necessary for private sector access to olive oil exports. In addition, an urban consumer survey was conducted to understand actual consumption behavior and possible response to changes in the product mix. An operational Action Plan recommends ways to increase the efficiency of processing imported oils and local vegetable oil in order to: a) economize CGC expenditures on oil subsidies; b) eliminate waste associated with mixing olive oil and other vegetable oil; and c) place a larger variety of vegetable oils on the market.

This study was conducted by Rahdi Meddeb of Comete Engineering, with APIP funds outside Abt Associates' contract. Mr. A. Khaldi and Mr. A. Chaffai, DGPDIA together with Mr. Rouissi, ONH actively participated in the study.

6.4 Reduction of Subsidies for Agricultural Inputs: Impact on the Demand for Inputs and Supply of Output

The ASAP calls for the gradual elimination of chemical fertilizer subsidies, herbicides, selected cereal seeds, and seed potatoes. Eliminating subsidies will affect the allocation of resources within the agricultural sector, use of inputs, supply of the corresponding products, farmer incomes, and the competitiveness of local as compared to imported products. The study analyzed the anticipated impact of these measures. This three-part study examines a) subsidy policy and the use of subsidized inputs in Tunisian agriculture; b) the impact of eliminating subsidies on farmer incomes and on the economic and financial return of the main subsidized products; and c) the impact of subsidy elimination on the demand for subsidized inputs and supply of the corresponding products.

Results of the study showed that the policy of subsidizing fertilizers has resulted in intensified use of fertilizers and a major increase in yields. Estimates indicate that at current fertilizer prices (1988), farmers are motivated to increase their use, since the additional revenues resulting from fertilizer use are significantly greater than the commercial cost. The study

concludes that measures should be taken to ensure that elimination of subsidies does not have a negative impact on the use of inputs and on production. The analysis indicates that the use of these inputs remains less than optimal from the standpoint of both the farmers and of society. The means of financing play a major role, independent of prices, in the use of chemical fertilizers. At present large farmers benefit from subsidies and from access to credit. The gap between the productivity of fertilizers and the commercial or social cost should be much greater for small and medium farmers than for large ones. Means should be found for making credit available to farmers who have been excluded to date.

This study was implemented by team leader, Mohamed Salah Redjeb, ISG, with participation of Mohamed Lahouel, ISG, and Peter Bloch, Abt Associates consultant. Study participants from the DGPDIA included Mr. Akrouf, chef de file, Mr. Chouchane, Mr. Ouertani and Mr. Mzoughi. A draft report in French was submitted in October, 1988. A final draft was submitted in March, 1989.

6.5 The Possibilities for Improving the Marketing of Chemical Fertilizers and Their Use on Farms

The overall objective of this study is to examine how the use and marketing of fertilizers, and in particular their distribution, can be improved technically, financially and economically. Agricultural production potential is still underutilized and expansion of useful agricultural area remains very limited. As a result, increased production must necessarily involve intensified cultivation methods; fertilizer use is one of the essential factors. The analysis recommends revitalizing agricultural research on plant nutrition, studying farmer motivation with respect to intensified cultivation and especially fertilizer use; improving the procedures for granting seasonal credit; and promoting certain simple and inexpensive techniques for farmers.

The analysis of fertilizer marketing identifies constraints to private sector participation and efficient distribution and recommends revitalizing distribution channels to enhance the quality of services to the farmer (supply, transportation, credit, technical information) and encouraging the storage of fertilizers where potentially feasible in order to enhance supply and reduce distribution costs. While the report urges a gradual government disengagement from fertilizer marketing, it recommends that measures be taken to safeguard a balance between the interests of consumers and participants in the distribution system. Healthy and adequate competition that generates services must be promoted for this purpose. It also suggests a unit be created to design, coordinate, monitor, control and evaluate the results of fertilizer policy reform and to promote intensive agriculture through existing executing agencies.

The final report was submitted by Abt Associates in February 1989. The study was implemented by team leader, Mr. Charles Heureux with Mr. Gaston Rondia, Abt Associates consultants, and Mr. M.S. Bachta, CNEA. Study participants from the DGPDI A included Abdelhakim Khaldi, chef de file, Mr. A. Chaffai and Ms. N. Gmir.

6.6 A Plan of Action for Tunisia's Cereals Sector: First Phase Report

In light of growing demand for cereals and cereal products, it is likely that annual subsidy costs for the cereals sector will grow from their projected level of 234 million TD in 1989 to about 350 million TD by the year 2000, assuming no changes in current prices. The maintenance of a subsidy and price stabilization system will require a continued role for government as market regulator and administrator of subsidies. In the cereals market, this will include price support, regulation at producer, intermediary and consumer levels, and measures to limit fraud. While the current subsidy system places important limits on the range of reform options available, it does not eliminate them. Important strides can be made toward freeing up the current system, attracting additional investment in its further development as well as improving its efficiency, and reducing its dependence on the public treasury.

In pursuit of these objectives, an action plan for public and private sector assembly, imports and marketing recommended a) short-term and medium-term measures to free market operations and encourage investment; b) short-term measures to refine the role of the Cereals Office and streamline its operations; and c) medium-term measures affecting the Cereals Office and other government responsibilities and expenditures.

The study was carried out under a buy-in to the Agricultural Marketing Improvement Strategies (AMIS) project. Team leader, Dr. Mark Newman, Abt Associates, conducted the study with Jim Ladd, Deloitte Haskins & Sells, Dr. Mongi Boughzala, Abt consultant and Professor at the University of Tunis, and Badr Ben Ammar, chef de file, DGPDI A.

7.0 SUMMARY OF YEAR II MODELING ACTIVITIES

7.1 Structural Change and Yield Response in Tunisia's Cereals Sector

Tunisia has experienced considerable variation in the production of its basic agricultural commodities. The magnitude of these swings has become more extreme in recent years. This study uses three different analytical techniques to help explain the changes in production of Tunisia's three principal cereals (durum wheat, bread wheat and barley) over time: a) a growth rate analysis is used to examine the trends in production, yields and area planted. Its purpose is to explore the extent to which past changes in levels of production have occurred through either intensification (greater use of inputs per unit of area) or extensification (increases in area planted); b) a yield function analysis is used to examine the determinants of these changes in yields, particularly the influence of rainfall and fertilizer; and c) an input demand analysis is used to examine the relationship between fertilizer use and input prices.

This activity was carried out under the APIP modeling activities and has additional objectives: 1) help establish a data base within the DGPDI for future studies; and 2) provide training to DGPDI staff in single equation econometric estimation and some of the modeling techniques used in applied policy analysis.

A draft report was submitted by the University of Wisconsin in November. The analysis was conducted by Dr. Patti Kristjanson and Michael Roth, University of Wisconsin with the DGPDI working group, Ms. Ayda Mechergui, Mr. Hamdi Larbi and Mr. Mosbah Bel Haj.

7.2 An Econometric Model of Tunisian Agriculture

An econometric model of Tunisian agriculture was developed and submitted in November by Dr. Jean-Paul Chavas, University of Wisconsin, in coordination with the DGPDI working group. The model consists of five outputs (cereals, fruits, vegetables, livestock, and other crops) and two inputs (variable inputs - fertilizers, chemicals, etc. - and other inputs). The model is based on annual data from 1971 to 1988. Two versions of the model are specified and estimated: the structural econometric model incorporates risk and partial adjustments; the other is a reduced form model of supply and demand functions.

The results indicate that the response to changing market conditions varies across sectors. For cereals and fruits, supply elasticities are relatively high, indicating the importance of prices in influencing production decisions. For those sectors, pricing policy is therefore expected to have important effects on levels of production. In contrast, vegetables, livestock and variable inputs have slower adjustment coefficients and are less responsive to changing market conditions. This indicates that,

besides prices, other factors, such as access to credit and input availability play an important role in guiding production decisions in those sectors.

7.3 Input and Commodity Price Policy Interventions Under Alternative Drought Scenarios in Tunisia: A Crop Budgeting Analysis

Crop budgets are useful for evaluating impacts of agricultural policy reforms on revenue, costs, investment and producer incentives. If budgets are sufficiently disaggregated by commodity, simple predictions on comparative advantage and the direction of adjustments in agriculture are possible. Crop budgets are also useful for forecasting the distributional impacts of policy change. Such distributional impacts are crucial when examining the political and social consequences of reforms. They provide a simple approach to the analysis of agricultural policy which is particularly useful when extensive time series data are lacking.

Tunisia's two most important agricultural surveys -- the Enquete Conjoncture and the Enquete de Base -- are used in this analysis to construct crop budget models for Tunisian agriculture. Representative crop budget models are constructed for five economic regions of Tunisia and used to evaluate the impact of subsidy removal and price policy on crop and farm income, under three states of rainfall. The models lay the foundation for future farm modeling studies and for studying the distributional impacts of policy change.

This analysis contained in this report was conducted by University of Wisconsin team, Michael Roth, Peter Bloch and Chris Walker with the participation of Ms. Ayda Mechergui, Mr. Hamdi Larbi and Mr. Mosbah Bel Haj, DGPDI working group. The draft was submitted in December.

7.4 Preliminary Report - Creation of an Agricultural Data Bank

The purpose of the document is to put together a chronological series of existing data for Tunisian agriculture in order to facilitate the work of researchers, analysts and planners in the Ministry of Agriculture and elsewhere. Existing data has been computerized and exists in QUATTRO as well as LOTUS 123. It is a result of a tremendous effort early in 1989 on the part of the members of the modeling working group, Mr. Tahar Ghomam, Mr. Mosbah Bel Haj, Ms. Ayda Mechergui, and Mr. Hamdi Larbi and Ms. Patricia Kristjanson and Mr. Michael Roth from the University of Wisconsin.

ANNEX B

PUBLICATIONS LIST - APIP

- Abbott, John and Bechir Rassas. 1987. Development of Agricultural Exports in Tunisia. Tunis: Ministry of Agriculture, USAID. (Under contract to Abt Associates, APAP).
- Associates for International Resources and Development (AIRD). 1987. Tunisia - Agricultural Profitability, Protection, and Comparative Advantage. Tunis: Ministry of Agriculture.
- Chavas, Jean-Paul. 1989. An Econometric Model of Tunisian Agriculture. Tunis: Ministry of Agriculture, USAID. (Under Abt Associates subcontract to U. Of Wisconsin through APIP).
- Ithaca International Ltd. 1989. Export Commodity Study - Olive Oil. Tunis: Ministry of Agriculture, USAID. (Under Abt Associates subcontract through APIP)
- Ithaca International Ltd. 1989. Export Commodity Study - Citrus. Tunis: Ministry of Agriculture, USAID. (Under Abt Associates subcontract through APIP).
- Ithaca International Ltd. 1989. Export Commodity Study - Wine. Tunis: Ministry of Agriculture, USAID. (Under Abt Associates subcontract through APIP).
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- Heureux, C., G. Rondia and M.S. Bachta. 1989. Possibilities for Improving the Marketing of Chemical Fertilizers and Their Use on Farms. Tunis: Ministry of Agriculture, USAID. (Under contract to Abt Associates and CNEA, APIP.)
- Klein, Harold, W. Kelly and L. Malczynski. 1988. Management Audit of the Planning Unit in Tunisia's Ministry of Agriculture. USAID/Tunis, Ministry of Agriculture.
- Kristjanson, Patti and Michael Roth. 1989. Structural Change and Yield Response in Tunisia's Cereals Sector. Tunis: Ministry of Agriculture, USAID. (Under contract to U. of Wisconsin through APIP).

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- Redjeb, M.S., M. Lahouel and P. Bloch. 1989. Reduction of Input Subsidies. Tunis: Ministry of Agriculture, USAID. (Under contract to Institute Supérieur de Gestion and Abt Associates, APIP).
- Roth, Michael, Peter Bloch and Chris Walker. 1989. Commodity Price Policy Interventions Under Alternative Drought Scenarios in Tunisia: A Crop Budgeting Analysis. Tunis: Ministry of Agriculture, USAID. (Under Contract to U. of Wisconsin, APIP).

Papers Presented at the Seminar Sponsored by APIP
and The Tunisian Ministry of Agriculture
"Structural Adjustment and Challenges for the 1990s"

May 24-25, 1989, Tunisia

Theme I: Structural Adjustment

Elliot Berg, "Structural Adjustment and Its Critics." (English only)

Mongi Safra, "Politiques macro-economiques et politiques agricoles et leur effects." (French only)

Theme II: Export Growth: Competitiveness and Export Markets for Agricultural Products.

Dr. Daniel Sisler, "Export Commodity Study: Olive Oil."

Dr. Edward McLaughlin, "Export Commodity Study: Citrus."

Dr. Gerald White, "Export Commodity Study: Wines."

Theme III: Subsidy Reductions: Impact on Supply and Demand

Dr. M.S. Redjeb, "The Impact of Reductions in Subsidies."

M.C. Heurreux, "Commercialisation des Engrais." (French only)

Mr. R. Meddeb, "Commercialisation des Huiles de Melange." (French only)

Theme IV: The Role of the Public and Private Sectors in the Markets for Agricultural Products.

Dr. Mark Newman and Dr. M. Boughzala, "What Role for Public and Private Sectors in Tunisia's Grain Assembly and Import Markets."