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AGRICULTURAL POLICY IMPLEMENTATION PROJECT

APIP

TUNISIA - 664-0343

PROJECT ASSISTANCE COMPLETION REPORT

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USAID/Tunisia

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1. INTRODUCTION

The Agricultural Policy Analysis Project (APIP) was designed and funded by the United States Agency for International Development, Special Mission for Economic and Technical Cooperation in Tunisia to support the Tunisian Government in its policy reform (ASAP). The four-year \$5.2 million dollar project was signed on April 23, 1987 with the Government of Tunisia, and the prime contract for \$3.2 million dollars was awarded seven months later to Abt Associates Inc. The prime contractor and its subcontractors were responsible for carrying out a variety of agricultural policy studies, formal and informal training. Several other contractors, especially local consultants and consulting firms, worked on a variety of technical assistance assignments.

Throughout the life of APIP more than 35 technical assistance assignments have been conducted in collaboration with the contractors, the Government of Tunisia, and numerous public and private sector institutions. Major accomplishments cover policy reform, training, study tours to the U.S. and other countries, analysis of policy impacts through the use of mathematical tools, and institutional development. Following are some highlights:

- Policy reform in cereals assembly, storage and marketing;
- Assistance in setting up a new grain grading system;
- Demonstrations and training for the Director of Agricultural Statistics on methods for improving crop forecasting;
- Assessment of traditional grain storage - to become part of the national strategy to increase grain storage capacity;
- Liberalization of imports of powdered milk and animal feed;
- Liberalization of exports of edible oils, olive oil and wine;
- Costs of production of olive oil;
- Private sector participation in fertilizer distribution;
- Reduction and/or elimination of subsidies on agricultural inputs, irrigation water, grain transportation, and a number of basic food prices;
- Analysis of the food subsidy system assisting decision-

makers to reduce basic food subsidies and search for appropriate, efficient targetted food subsidies;

- Research and production of bread flour which distinguishes the subsidized and non-subsidized product;
- Development of export strategies for wine, specialty fruits, dates, olive oil, cut flowers and seafood products;
- Finalization of public and private sector farm management models;
- Attendance by Tunisian public and private sector personnel at a variety of training courses;
- Development and organization of tailor-made study tours for various government officials;
- Organization of a number of seminars on agricultural structural adjustment and policy reform; round tables on specific commodities, such as cereals and flowers;
- Institutional development including project management, contracting procedures, financial management, drafting scopes of work, and reporting;
- A maximum amount of ministries, government agencies, institutions and private sector participation in APIP activities;
- Delivery of over 35 final reports in English and French.

The purpose of this Project Assistance Completion Report is to summarize the activities of the Agricultural Policy Implementation Project, including accomplishments, achievement of project goals, policy impacts, and lessons learned which might be relevant to programming, design and implementation of other activities.

The report covers the suggestions from - Guidance for Preparing the Project Assistance Completion Report found in AID Handbook 3, App 14A to the extent they are relevant. It draws heavily on the final report written by Abt Associates Inc. in July 1991 with an update on activities which have taken place through April 1993 (project assistance completion date was 4/29/93).

2. PROJECT BACKGROUND AND OVERVIEW

Since the early 1980's Tunisia has been facing severe economic difficulties, including budget and balance of payment deficits. One of the consequences has been a relative decline of the agricultural sector's contribution to the economy, particularly in

terms of food production and exports. In addition, Tunisia has experienced problems in maintaining and expanding its agricultural exports, consisting primarily of olive oil, dates, seafood, specialty fruits, wine and fruits and vegetables.

In response to these difficulties, an Agricultural Structural Adjustment Program (ASAP) was undertaken with the International Bank for Reconstruction and Development (IBRD) support. The readjustment program focuses on four major goals:

- increasing the role of market forces in determining prices of agricultural inputs and products;
- increasing the role of the private sector in marketing farm inputs and products, both internally and internationally;
- enhancing the effectiveness of government agencies in supporting agricultural production and marketing; and
- protecting the welfare and nutritional well-being of poor consumers in urban and rural areas of Tunisia.

The APIP was designed in close collaboration with the Ministry of Agriculture, Ministry of Economy and Ministry of Plan to actively support the GOT/IBRD Agricultural Structural Adjustment Program and Tunisia's commitment to economic restructuring and policy reform. Although the ASAP identified numerous areas constraining efficiency and performance of the agricultural sector, it did not provide any analytical means to determine how the program would be implemented to achieve policy objectives. Thus, the Project was developed with two purposes: a) to provide Tunisian policy makers with a series of specific and timely studies of key policy issues that include data analysis and options for making rational economic and agricultural policy choices; and b) to reinforce the capabilities of technicians and analysts in Tunisian government agencies in identification and analysis of policy constraints, formulation of policy recommendations, and monitoring the impacts of policy changes on the agricultural sector.

3. PROJECT ORGANIZATION AND IMPLEMENTATION

The \$3.2 million technical assistance component of the Agricultural Policy Implementation Project was awarded to Abt Associates in November 1987; the other \$2 million was managed by the Ministry of Agriculture's General Directorate for Development Planning and Agricultural Investments (DGPDIA) and provided the funding for computer equipment, training and some technical assistance (host-country contracts). The Ministries of Agriculture, Plan and Economy, as well as other GOT agencies and private sector businesses, actively participated and received technical assistance and training through APIP.

The content of APIP has remained consistent with the general scope of work in the Project Paper, but implementation of the Project has been managed in three different stages.

The major portion of the Project was implemented through the institutional contractor and a few host-country contracts signed with the Ministry of Agriculture. The Abt prime contract, originally from November 1987 thru April 1991, was extended thru September 1991 due to delays caused by the Gulf War. The Project itself was extended beyond the institutional contract thru April 1993, in order to continue with technical assistance deemed necessary and to pave the way for an agribusiness program which, because of budget cuts, had to be cancelled.

From October 1991 thru April 1993 a USAID Project Officer has worked closely with the Ministry of Agriculture, Ministry of Economy and Cereals Office in contracting (direct USAID contracts) and monitoring nine studies/activities agreed on between USAID and the Ministry of Agriculture: Seven studies - wine marketing, olive oil exports, costs of cereals collection and storage, soft wheat processing, traditional on-farm grain storage, table olives sector and costs of production of olive oil and a round table on cut flowers and an inquiry related to privatization of existing Ministry of Agriculture related organizations. In addition, Abt Associates finalized work in December 1992 on grain grading, crop forecasting, market information and future markets under a buy-in to its Agricultural Marketing Improvement Strategy Project (AMIS).

3.1. Organization under the Prime Contract

Abt Associates, Inc.'s contract for 235 person months included 40 months of a long-term resident advisor/representative, 40 months of home office support and 155 months of short-term technical assistance. Primary subcontractors included the Institut Supérieur de Gestion (ISG), a branch of the University of Tunis, Ithaca International, Limited, and the University of Wisconsin. ISG's role was to assure that the U.S.-based contractors had access to qualified local expertise. Working with a local institution also insured continuity to studies and research which extended over a long period to time. Several other subcontracts were issued during the course of the project as special needs materialized. The majority of additional subcontracts were with local Tunisian firms, consultants or research institutions.

A contract office was set up in the Ministry of Agriculture's DG/PDIA. The local office staff was hired through a subcontract with a Tunisian accounting firm. The Tunis office (actually there were three offices) was staffed with the resident representative, assistant/office manager, secretary and two chauffeurs and worked closely with members of the DG/PDIA and other ministries and agencies. The representative reported to the General Director of the DG/PDIA on a daily basis, while coordinating closely with the

USAID Project Officer. Abt's representative was responsible for coordinating technical assistance with the home office, planning and managing research activities, and administration of the APIP office.

Abt Associates Inc. provided ongoing technical oversight from APIP's D.C.-based project director while other Abt staff members and subcontractors led short-term technical assistance missions in Tunisia and recruited specific expertise when required. Requests for technical assistance were coordinated by the resident representative with the Executive Committee (see below) in Tunis and with local counterpart agencies. The home office lined up teams composed of staff and/or consultants and submitted proposals back to Tunis through the Representative for GOT and USAID approval. Meanwhile, the Tunis staff conducted literature reviews, collected documentation and lined up local expertise in preparation for the teams. An electronic mail system between the project office and home office facilitated exchange of information, data and financial monitoring.

3.2. Project Reporting and Monitoring

In addition to the annual work plans, Abt Associates' resident representative submitted quarterly and semi-annual reports on project activities to USAID and to the DG/PDIA. These reports served as a tool to monitor APIP progress, issues and solutions.

Contract finances were monitored by the home office with input on upcoming expenses provided from Tunis. A project account was set up in Tunis at a local bank and money was transferred as needed. Local consultants, office staff, expenses incurred in Tunisia were paid out of that account which was monitored in the Tunis office. Locally incurred expenses were reported back to Abt Associates' Cambridge office with receipts and included in Abt's vouchers to USAID.

At USAID the Project Officer monitors project expenditures through the Controller's computerized MACS system. The system logs all PIOs and disbursements under the categories of Technical Assistance, Commodities, Training, Evaluations and Audit, and Contingency. Monitoring of PASAs and buy-ins has been problematic since USDA waits years to submit its bills, and USAID/W contracting offices often neglect to send AOCs on buy-in expenditures back to the Mission.

3.3. Project Planning

Annual implementation plan meetings took place each year in Tunis in order to set priorities, discuss issues, project status and develop a work plan of activities for the upcoming year. Planned Project technical assistance was coordinated with the IBRD's scheduled set of ASAL conditions. The resident representative

drafted a Work Plan which included an implementation plan and status of on-going and completed activities. This draft was submitted to all the participants for comment before the meeting took place. Participants at these meetings included representatives from the Ministry of Agriculture, Ministry of Plan, Ministry of National Economy, USAID/Tunis, Abt Associates, Inc. and its primary subcontractors. Brief presentations of work accomplished over the previous year were made by ministry staff members and contractors.

An essential component of APIP's operational organization was the ability to respond to changing government needs for policy analysis. Although the approved Annual Work Plan was intended to set the overall agenda of policy studies and training activities for each year, the Plan remained flexible to accommodate changes in GOT priorities as they occurred.

3.4. Project Oversight

In the original design of APIP, the Coordinating Committee for the GOT/IBRD Agricultural Sector Adjustment Loan Program was to serve as the overall policy coordinator for the Project. This key institutional component between APIP-generated data/policy recommendations and policy implementation was to be the focal point of the Project and all analytical outputs were to flow directly to it for use by decision-makers. The Committee was also to participate in the Annual Work Plan review and provide guidance and final approval for its implementation. However, the Committee never functioned in this capacity, due in part to the difficulties in trying to get its numerous, very high level representation to meet on a regular basis. Both USAID/Tunis and its prime contractor were concerned that the Project's priorities, activities and dissemination of findings were not including key decision makers among the various ministries.

To compensate for these concerns a Steering Committee, composed of the Secretary of State for Agriculture, Secretary of State for National Economy and the Ministry of Planning and Finance's General Director for Planning was formed, and weekly meetings were set up to review APIP's progress and establish GOT priorities within the project.

In addition, an Executive Committee was formed to oversee all project activities, recommend priorities, set deadlines, delegate responsibilities among APIP participants, and report back to the Steering Committee. The weekly committee meetings were composed of the Director of Prices and Economic Control, the DG/PDIA's project coordinator, representative from the Ministry of Plan, the USAID Project Officer, and Abt's resident representative. The committee's most important accomplishments were: a) expanded participation by both public and private sector in APIP's activities; and b) broader dissemination of information about the

project and its technical studies. High level and working level committees with representation from key institutions and agencies are essential to the successful management and implementation of such a project.

4. MEETING PROJECT GOALS AND PURPOSES

For the most part, APIP's activities have concentrated on technical assistance to provide the GOT with required analysis of issues related to the ASAP. Studies have been demand driven by the GOT and implemented by contractors with the participation of staff from ministries and other agencies. In part, this formula of combining GOT staff with consulting teams has served to fulfill both project purposes; first, providing economic analyses, and secondly, reinforcing GOT staff capabilities. In addition, commodity procurement has brought computer technology and analytic tools which were sorely missing at the beginning of the project. Formal training has also contributed to increased staff capabilities with more than 30 public and private officials attending courses in the U.S. and other countries, not to mention training which has taken place in Tunisia.

The principal dollar inputs for various Project components are as follows:

Technical assistance:	\$4,569,200
Training:	\$ 280,000
Commodities:	\$ 300,000
Evaluation:	\$ 75,000
Contingency:	\$ 13,400

The principal project outputs tie in directly with the project purposes. APIP has provided GOT decision-makers with the necessary quantitative economic information to implement the policy reform of the Agricultural Structural Adjustment Program and has trained a cadre to identify policy constraints, conduct appropriate economic analyses, formulate actionable policy recommendations, and monitor the impacts of policy reforms in the agricultural sector.

5. GOT CONTRIBUTIONS

GOT personnel have been actively involved in APIP activities through logistic support, drafting terms of reference, organizing meetings, receiving consultants, project planning, implementation and monitoring, development of training programs, and distribution of documents, to name a few, since 1987. In addition to staff participation in technical assistance activities, the DG/PDIA's Director General is the GOT's project director and signatory for Project activities funded outside of the Abt contract. A full-time GOT project coordinator assigned to APIP worked closely with the contractor's staff in Tunis on a daily basis and continues to work with the USAID Project Officer. In addition, staff of the

Ministry of Economy, including the DG for the Direction of Prices and the Director of Price Control have been close collaborators on project implementation as well as staff from the Ministry of Plan.

GOT costs, based on an increased workload and staff, training costs, use of facilities and some logistics support was estimated in the Project Paper at \$787,000 over the life of the project. The GOT estimated its contribution in support of the project during its life at TD853,000 equivalent to approximately \$950,000 (based on average rate of \$1.00 = TD 0.9).

6. PROJECT ACCOMPLISHMENTS

6.1. Technical Assistance

Although the Project Paper spells out a specific schedule of technical assistance activities by year, the Project has remained flexible to the realities of the dynamic policy making and reform process; Project activities have been constantly revised to allow for GOT changes in priorities.

APIP's support to the Agricultural Structural Adjustment Program has led to major achievements, including: a) liberalizing imports; b) reduction in agricultural subsidies; c) liberalizing and promoting agricultural exports; d) and promotion of private sector participation in agricultural support services. The following table summarizes Project activities, accomplishments and impact achieved through technical assistance.

APIP ACTIVITIES AND POLICY IMPACTS

<u>Activities -</u> <u>Technical Assistance</u>	<u>Contractor</u>	<u>Dates</u>	<u>Chef</u> <u>de File</u>	<u>Result/Impact</u>
I. <u>Pre-Project Studies</u>				
Domestic Resource Cost Analysis	AIRD	1987	MOA	Controversial MOA has promised to update
Development of Ag Exports	Abt	1987	MOA	Overview of Export Sector
Management Audit	DAI	1988	DG/PDIA	Unfortunately not consulted
II. <u>Export Promotion</u>				
A. Olive Oil				
Competitiveness & Export Marketing	Ithaca	1989	DG/PDIA; ONH	Solid collection of important information & data used to take a good look at role of ONH and the sector. During U.S. tour major contacts made w/Lindsay Olives. ONH now has office in U.S.
Edible Oil Master Plan	Comete	1989	DG/PDIA; ONH	Recommendations included a) allow private sector to export; b) liberalize imports and decontrol domestic processing; c) eliminate blending of olive oil. Private sector authorized to export (must still buy from ONH).
Liberalization of Collection	Comete	1992	DG/PDIA; ONH	With this study GOT has at its disposal coherent thinking to liberalize the entire olive oil sector. Further, the study enabled a better comprehension of the elements constituting the costs of production. Those costs will be the essential component for liberalizing the sector.
B. Citrus				
Competitiveness & Export Marketing	Ithaca	1989	DG/PDIA; GIAF	Solid collection of important information & data. Technical advice now sought in U.S. by Tunisian growers.
C. Wine				
Competitiveness & Export Marketing	Ithaca	1989	DG/PDIA; ONV	Solid collection of important information & data.
Liberalization of Marketing & Reorganization of Sector	BCEF	1992	DG/PDIA; ONV	GOT studying private sector participation in wine marketing & redefinition of role of ONV.
D. Dates				
Competitiveness & Export Marketing	Ithaca	1990	DG/PDIA; GID	Floor price has been increased; campaign to improve quality; research program to eradicate worms and other diseases; GOT has requested additional assistance from other donors.
E. Cut Flowers				
1. Export Potential	Abt	1991	CEPEX; APIA	Primary data collection & interviews w/growers/exporters; Round table brought together producers and GOT officials to discuss constraints. Formation of private growers' association.
2. Round Table	BCEF	1993	DG/PDIA	Follow up discussion on constraints facing promotion/expansion/exports of this sector.
F. Seafood				
Export Strategy	Abt	1991	CGP; DG/PDIA	Good recommendations for increased potential in exports. Following work schedule, including search for joint ventures.

<u>Activities - Technical Assistance</u>	<u>Contractor</u>	<u>Dates</u>	<u>Chef de File</u>	<u>Result/Impact</u>
G. Table Olives Sector in Tunisia	BADIS	1993	DG/PDIA	Good analysis of the situation of this sector providing an outline of a strategy for promoting this product. GOT has decided that all incentives (estimated at over \$1.5 million in 1992) previously allocated to the olive oil sector be reallocated to the table olive sector only. This means that no incentives will be given for planting trees for olive oil production.
III. Cereals				
A. Action Plan - Phase I	Abt	1989	DG/PDIA; OC	Basic outline for restructuring the OC. Decree issued to authorize private collection & storage.
B. Removal of Feed Grain Subsidies & Import Liberalization	Abt	1990	OC; DG/PDIA	Liberalization would allow a) more variety in feed ingredients; b) improved timing in availability; and c) better quality. GOT formulated Action Plan. Have liberalized import of maize.
C. Transport Cost Equalization	SIDES	1990	DG/PDIA, OC	Action Plan eliminates subsidy for semolina and wheat flour. 1.3 MD savings to compensation fund.
D. Seasonal Pricing	Abt	1991	OC	GOT contemplating seasonal prices for near future.
E. Lessons from other Countries	Abt	1991	OC	
F. Grain Grading, Crop Forecasting	Abt	1992	OC; DG/PDIA	Grain grading system simplified; OC needs further TA to set up pilot project to test new grades. Recommendations for improved efficiency of crop forecasting. Dir. of Ag. Statistics sent on study tour to U.S. hosted by MASS.
G. Market Information for Grains	Abt	1992	OC; DG/PDIA	OC has now at its disposal an appreciable source of information to monitor international market.
H. Traditional On-Farm Storage	Bartali	1992	OC; DG/PDIA	Quick assessment of on-farm traditional storage shows great opportunity to increase storage capacity. GOT to include in national strategy on grain storage. Possible links with research and training in Morocco.
I. Costs of Cereals Collect & Storage	SIDES	1992	DG/PDIA; OC	The objective of this study is to evaluate the costs of collection and storage of grains to determine the profitability in order to encourage private investment in various storage methods, thereby increasing Tunisia's overall capacity.
IV. Food Subsidies				
A. Study of the Subsidy Fund Phases I & II	Abt/ISG	1990	DPCE; MOP; MOA	Recommended ways to reduce basic subsidies and target food subsidies to lower income groups. Subsidy on baguette has been decreased. Larger subsidy remains on "gros pain". Subsidies eliminated from many wheat products, such as cous-cous. Compensation fund deficit reduced from 362 MD in 1989 to 270 MD in 1991.
B. Survey: Public Perceptions	CPS	1990	DPCE	Tested sensitivity to rise in bread prices and awareness of subsidies.
C. Targeting Alternatives	AED/Kramer	1990	DPCE/USAID	Experience from other countries.

<u>Activities - Technical Assistance</u>	<u>Contractor</u>	<u>Dates</u>	<u>Chef de File</u>	<u>Result/Impact</u>
D. Soft Wheat Processing	BCEF	1992	DG/CCI	Research on production of flour at higher PS which will be differentiated from non-subsidized flour. Goal is to use flour to produce bread targetted to lower income groups. Ultimately, this will allow a variety of non-subsidized bread on the market. Potential impact would be savings of 16 to 20 MD/year to the compensation fund.
<u>V. Agricultural Inputs</u>				
A. Marketing of Chemical Fertilizers	Abt/CNEA	1989	DG/PDIA	Action Plan to allow private sector to participate in distribution. 1.2 MD/year savings to the compensation fund.
B. Reduction of Input Subsidies	Abt/ISG	1989	DG/PDIA;	Action Plan to reduce subsidies while assuring small farmers are not harmed.
C. Irrigation Subsidies	ABT/CNEA	1991	DG/PDIA	No report. Work assisted in development of an Action Plan to increase the price of irrigation water by 9% in real terms over the next 5 years.
<u>VI. Liberalization of Imports</u>				
Milk Processing - Cost Study	Ithaca	1990	DG/PDIA	Recommendations led to authorization of private sector to import powdered milk.
<u>VII. Tools for Policy Analysis</u>				
A. Agricultural Data Base	Wisconsin	1989	DG/PDIA	Working group at MOA worked w/Univ. of Wisconsin to put together a data base for developing other modeling tools.
B. Structural Change & Yield Cereals	Wisconsin	1990	DG/PDIA	University of Wisconsin and INAT worked throughout the project with staff at the MOA to develop mathematical tools to analyze the impact of policy change on farmer behavior. This set of activities required on-the-job training both in Tunisia and the U.S. The purpose was to develop the capability to do policy analysis within the MOA while designing and preparing the 8th Plan document.
C. Input & Commodity Price Policy	Wisconsin	1990	DG/PDIA	
D. Econometric Model of Tunisian Ag.	Wisconsin	1990	DG/PDIA	
E. Output & Input Demand Response to Price & Non-Price Policy - Priv.	Wisconsin	1991	DG/PDIA	
F. Linear Model for Ag. Planning Public Sector -	Wisconsin INAT	1991	DG/PDIA	This work has shown the limits and gaps of the annual basic agric. survey especially in terms of data which were collected by segments. As a result of this work and since 1991 the annual comprehensive agric. survey is conducted on a farm unit basis (concept of agric. production systems)
G. Cost of Production of Olive Oil	BCEF	1993	DG/PDIA	Determine production costs according to systems that should accurately reflect the reality of Tunisian agricultural growing conditions.
H. Inquiry related to privatization of existing Ministry of Agriculture-related organizations and possibilities to provide assistance to private agricultural groups	Dr. H. Amamou	1993	DG/PDIA	

6.2. Training

6.2.1 Formal, Informal and On-the-Job

APIP's training program has included formal, informal and on-the-job training for both ministry personnel and private sector participants in the agricultural sector. Training funds have been utilized to send individuals to the U.S. for formal courses in management, economic development, statistical methods, privatization, women in development, grain marketing and grain storage techniques.

On an informal basis APIP's contractors have provided on-the-job training in analytical and technical procedures of economic analyses to members of the working groups (staff members assigned to technical assistance teams). Other forums of informal training have consisted of short workshops, seminars and presentations given by the consultants in their particular skill area.

Under the University of Wisconsin's subcontract, four staff from the DG/PDIA and Statistical Unit have, at separate times, spent up to one month each in Wisconsin working with professors in developing models for determining the impact of policy changes on farmers' behavior. This type of training continued in Tunis with the same staff members through a host-country contract with the National Agriculture School (INAT).

In addition, the following courses were arranged at local institutions in Tunis and financed under the prime contract:

1. Microcomputer Operations and Lotus 123 computer course
2. Operational Research Methods for Policy Analysis
3. Econometric Methods for Policy Analysis
4. Modeling and Forecasting of Economic Data
5. Beginning and Intermediate English

Involvement by ministry staff in technical assistance projects also created an institutional capability in drafting scopes of work, identifying expertise required for a particular analysis, asking the right set of questions, and managing technical assistance teams. Since the need for technical assistance will continue, these skills which have been developed by GOT staff will remain in high demand.

6.2.2 Study Tours

Grain Marketing

As part of the second phase of the Grain Marketing Study Abt's APIP Project Director organized and hosted a week long study tour in the U.S. for the President of Tunisia's Grain Marketing Board and the Ministry of Agriculture's director of Planning. These two high

level officials have worked closely throughout APIP in developing a cereal marketing master plan which aims to improve operations of the system, remove constraints to private sector participation, and define the role of the Marketing Board as an effective regulator of the cereals sector. The visit included Chicago and Kansas city Boards of Trade, private and cooperative grain companies, a grain storage silo exporter, the International Grains Program at Kansas State University, and government agencies concerned with market information, grainind and farm support programs.

Agricultural Statistics

Following recommendations from a technical assistance team's report on improvements in Tunisia's crop forecasting, APIP funded a tour to the U.S. organized by USDA's National Agricultural Statistics Service for the Director of Agricultural Statistics. The purpose of the tour was to learn more about the use and collection of agricultural statistics in order to improve the efficiency of Tunisia's Agricultural Statistics Unit.

Export Strategies

A number of Tunisian officials were hosted by Ithaca International as part of its export studies on wine, citrus and olive oil. The wines group visited major wine production enterprises in New York and California. They were put in contact with wine importers and distributors on the east coast, Texas and Canada. These contacts permitted the Tunisians to make detailed assessments of complete wine import/wholesale/retail operations in several markets. Wine tasting sessions were arranged in New York to introduce American wine specialists and importers to a range of Tunisian wines.

The olive oil export marketing group was put in contact with commercial importers and domestic producers of olive oil and other olive products on the east and west coasts of the U.S. Initial contacts made during these visits have subsequently resulted in at least one major contract being signed between Tunisian National Oils Office and Lindsay Olivest in California.

The citrus group visited major commercial and research organizations in Florida and California in addition to trips on the east coast to assess marketing and importing opportunities for Tunisian citrus products. In addition, the group investigated American citrus production, processing and marketing practices and contacted several firms interested in supplying Tunisian citrus producers with modern irrigation technologies and technical advice on the use of safety codes for agricultural chemicals related to citrus enterprises. It should be noted that the official citrus group participants were joined in California by a group of private Tunisian citrus producers who paid their own way to be included in this opportunity.

6.3. Dissemination Through Seminars and Workshops

Although workshops and seminars were not included in the Project Paper, they have provided an excellent method for dissemination of information and meaningful discussions on sensitive issues among a broad range of public and private sector participants. They have also provided an effective means for ministry staff involved in technical assistance working groups to present results and debate study recommendations.

Agricultural Structural Adjustment Seminar - May 1989

A two-day seminar was held at the Hotel Abou Nawas in Gammarth, just outside Tunis. 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 studies were presented and discussed among Tunisians and outside experts 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. To many, this seminar was an introduction to APIP as a project, and put the individual studies into a broader context of policy reform. The seminar was also a useful and efficient vehicle for disseminating two years of policy work.

Round Tables - Cut Flowers

(a) October 1990

At the end of field work carried out by an Abt team studying export promotion of cut flowers, producers/exporters, potential exporters, foreign partners, transport companies, promotion agencies and GOT officials were invited to participate in a round Table in Tunis to discuss the potential and opportunities for increasing Tunisian exports and the constraints confronting both current and potential flower exports. Examples of a variety of developing countries were cited as illustrations of how specific problems can and have been dealt with (post harvest handling, government regulations, transport). The Round table was a successful way to bring together all the players involved in the export process. The study had identified all flower producers, exporters and new flower projects and a complete list of names, addresses and telephone numbers was distributed to enable future contacts. Recommendations resulting from the discussions included the establishment of a private producer association to represent and promote the association in its contacts with government officials, international banks, donors and foreign clients and to collectively acquire the technical assistance necessary to enhance production and exports.

(b) April 1993

In order to permit an in-depth discussion of the constraints identified in the study mentioned above and to stress the measures that need to be taken to give the sector a fresh stimulus a second Round Table was organized. About 50 persons including professionals and support organizations participated in this event. the following is a summary of the proceedings.

At the technical level:

- Lack of professional skills in floriculture and wide dispersion of the small number of the existing professionals
- Lack of practical training for horticulturists (engineers and technicians) and need for short-term training both in Tunisia and abroad
- Non-existence of a technical unit specialized in cut flowers within the Ministry of Agriculture
- Non-existence of a priority order for technical problems to be solved through agronomical research
- A current extension system not adapted to the requirements of specialized crops such as floriculture

At the export level:

- Absence of a national export strategy
- Current legislation on export-oriented companies (Law of 72) is ill-adapted to floriculture as 20 to 30% of production is technically not exportable and should be sold on the domestic market
- Conflict between official working hours (customs and freight) and shipping requirements for a product as perishable as cut flowers
- Limitation of freight capabilities (a maximum of 300 kg)
- Lack of information about measures for the potential reduction of freight costs in the flowers sector
- Difficulties encountered by the trade in obtaining data on foreign markets (international trade channels, minimum export size, type of packing etc.)

At the institutional and state-incentives level

- Difficulty for certain promoters to have access to bank credits to finance floricultural projects which are considered high-risk

activities by bankers

- The wording of Article 20 Section 5 of the Code of Investments in Agriculture and Fishing may be confusing with regard to a potential tax exemption for physical persons
- Lack of incentives for investments in the field of floriculture
- Absence of an inter-professional association, which slows down the growth of this sector and restricts flower growers efforts to try and solve their problems by their own means without relying on government assistance

Conclusions of the Seminar

It should be noted that the deficiencies listed above concerning the technical, commercial and institutional aspects were the object of a consensus of opinion by all participants and that it would be advisable to explore carefully what remedial actions need to be taken and how any retained solutions could be promptly implemented.

The proposals made by the DG/PDIA General Director at the end of the seminar deal with the following topics:

- Cut flowers production is a profitable activity for Tunisia. Production conditions are favorable: nearness of Europe, favorable weather conditions, relatively low-cost labor, political stability, the Dinar convertibility etc, within the context of a relatively growing demand on the world market.
- Additional efforts should be made by the Government regarding
 - training (Agence de la Vulgarisation et de la Formation Agricoles -AVFA- can provide targetted training tailored to the specific needs of the trade)
 - easier product movement (freight, customs formalities, more suitable working hours for government offices etc.)
 - financial support to floriculture.

Additional efforts remain to be made by the trade as well to get better organized within an efficient professional organization. For this purpose, an informal follow-up committee has been set up, bringing together five operators.

At the Agency for the Promotion of Agricultural Investment (APIA) request, the Committee is called to establish contacts with the Ministry of Agriculture and other interested offices in order to develop the future organizational pattern for the trade. To that end, it is recommended that the said committee be provided with any needed logistic support and technical and legal assistance.

APIP Seminar - June 1991

"Agricultural Policy Reform and Structural Adjustment: Progress and Perspectives" was the theme of this seminar. Among the 150 attendees were a wide range of private agribusiness executives and government officials from Tunisia's Presidency, Prime Minister's office, Ministries of Agriculture, National Economy, Planning and Finance, Export and Investment Promotion Agencies, academic institutions and international agencies.

Presentations by government officials indicated major impacts of action plans developed under APIP on the new policy directions being put in place. These included increased transparency throughout the system, reorganization and reduction of subsidies in order to facilitate market reforms, reduced and reoriented roles for parastatal organizations in the grain and oilseed sectors, including private assembly, marketing and imports, and the development of export-oriented industries in sea products, cut flowers, dates, olive oil and processed grain products.

Round Table on Cereals - July 1992

In an effort to wrap up APIP's work on reforms in the cereals sector, a round table was organized in collaboration with the Ministry of Agriculture, Office of Cereals and Abt Associates. The ultimate purpose was to get together private operators and GOT officials to review progress made in the reform program and to discuss ways that the government can support private sector participation in cereals collection and storage. Presentations were made on grain grading, crop forecasting, market information for grains, and costs of cereals collection and storage.

As a result of discussions, the private sector participants requested a) an increase in the investment incentives for private cooperatives to build large storage facilities; b) more accessible credit; c) clarification on sale price of private importation of maize for animal feed; d) an official contact point where information on the latest cereals policies can be obtained; and e) the advantages offered through the Agricultural Investment Code be applied to investment in storing cereal by-products, such as flour, to permit more efficient handling, generate economies in storage and transport, and improve sanitary conditions in which flour is transported, stored and used. These important requests were noted by the Director of Agriculture Planning and have been conveyed to the Ministry of Agriculture.

7. COMMODITY PROCUREMENT

The Project Paper (Annex D) estimates the expenditure level for commodity procurement at \$300,000, including computers and software, project vehicles, specialized printing and color

monitoring, office equipment and furniture. The total amount actually spent is approximately \$273,000 over the life of the project. Without giving a full inventory, a quick review of the project files shows the following breakdowns:

1. Ministry of Agriculture (DG/PDIA)

Project Vehicles: 3 (two station wagons; one 4x4 truck)
 Computers: 10 Wang systems
 1 Portable
 3 PCs
 Printers: 13 Dot Matrix
 UPS: 8
 Air Conditioners: 3
 Fax: 1
 Overhead Projector: 1
 Software, computer supplies, curtains for computer rooms
 and office furniture

2. Ministry of Economy (DPCE)

Computers: 3 Wang systems
 3 PCs
 Printers: 4 dot matrix
 1 laser
 Photocopier: 1
 Overhead Projector: 1
 Software and office (computer) furniture

3. Ministry of Plan

Computers: 2 Wang systems

It should be noted that USAID was responsible for all procurement, with the exception of the Abt Associates' project office in Tunis. In the case of the project vehicles, Mission files show that PIO/Cs and waivers to purchase vehicles from Europe were signed in November 1987 but that the cars were not actually available to the project until mid-1988. There was a problem of registration due to the fact that the cars were ordered under the auspices of the U.S. Embassy and therefore, the Ministry of Agriculture had difficulties in taking ownership. To facilitate the process, the prime contractor was requested to register the vehicles under an RS status and to maintain and insure them for the duration of the contract, after which they would be turned over to the GOT.

Delays in procurement decisions for the computers meant that computers were not available for project use during the first year of the Project. These are perhaps normal issues at the start-up of a ny new project but can be avoided in the future by giving the contract, for example, responsibility for procurement.

8. EVALUATIONS

The Project Paper proposes two joint GOT/USAID evaluations. The first is to examine the objectives of the Project as they related to the objectives of the ASAP, and the extent to which APIP's analytical output was translated into policy actions. The final evaluation is to measure the degree to which Project purposes have been achieved.

8.1. Mid-Term Evaluation

The mid-term evaluation, conducted in the Fall of 1989, found the Project had largely achieved its objective of enhancing the GOT's capacity to enact and implement its agricultural structural adjustment program. Major recommendations included a) establishment of a steering committee and executive committee, b) development of a communications system, including electronic mail; c) institution of a systematic information and dissemination effort; and d) greater emphasis on the training component.

a) As stated earlier in this report, the evaluation supported the establishment of committees which would oversee the project at a very high level and at a working level. This enabled the Project to step back from the Ministry of Agriculture's "control" and to implicate other ministries and agencies in Project management and implementation.

b) It would have been premature to insist on a communications system, such as E-mail, to be set up within the Ministry of Agriculture since the technology exists nowhere else in the GOT. In any case, this was not a Project objective. The prime contractor, however, did have electronic mail system between the MOA and its home office.

c) The Project also made a greater effort at disseminating information to a broader audience. The resident representative wrote and circulated information on up-coming activities, announced arrival of consultant teams, the purpose of their visits and expertise, assured that each team had a debriefing session with concerned public and private sector officials and assured that a sufficient number of final report copies be available for distribution. However, since these reports were official documents, the GOT insisted on being responsible for their distribution.

d) The recommendation offered regarding on-the-job training were valid concerns but the solutions offered were unrealistic. With the exception of the University of Wisconsin activities, consultant teams could not rely on the availability of ministry staff. The concept of "on-the-job" training posed a conflict early on for short-term consultants and ministry staff. Although interest was general high on both sides, it was not always possible

for consultants to spend the time required with staff because their first priority was to complete their contract and deliver a report. On the other hand, ministry staff found it difficult to devote a large percentage of their time working with consultants because they had their own job-related tasks to accomplish each day. Nevertheless, important contributions and relevant training occurred as staff assisted in gathering data and documentation, set up and attended many of the meetings and reviews, and commented on draft reports.

8.2. Final Evaluation

A final evaluation was completed in January 1993 to assess APIP's contribution to progress in various agricultural sectors and the impact on the policy environment in general. This evaluation was also expected to lend guidance to an Agribusiness Program which, because of substantial budget reductions had to be cancelled.

The following are its major findings:

APIP's Contribution to Policy Reports:

Reduction of subsidies:

The project made a remarkable contribution in helping the GOT reduce the burden of the Compensation Fund. The reforms undertaken to date led to a reduction of the overall budget of the Compensation Fund from around 4% to 2% of GDP. The project's contribution to this performance was certainly important. The reforms proposed in the studies were either implemented as such or modified to meet certain political considerations.

Institutional reforms and privatization:

The project's chief contributions in institutional reforms and privatization concerned essentially the cereal and oil subsectors. The results were mixed. Legally, some important reforms have been undertaken to allow private operators to participate in collection storage, distribution and marketing. However, the private sector's participation, in practice, is still limited:

In the cereal sub-sector, private operators are now allowed to participate in collection and storage of grain under OC supervision and with its agreement (decree # 90-1083 of June 1990). The marketing of barley, soya and fertilizers has also been opened to the private sector, together with the importation of feedgrains without the interference of the OC, starting July 1992.

In practice, the qualifying conditions for cereals collection are so exacting that only two private sector activities are underway. The situation for storage is totally different. Private sector participation is not only accepted but even encouraged. To attract

private investments in storage the Office of Cereals made a commitment to rent the private sector-erected silos for a period of ten to fifteen years.

This policy has been adopted because the Office of Cereals has an ambitious program to double the storage capacity of the country within a period of five years. With private sector participation this goal is expected to be reached in less than three years.

In the vegetable oil sub-sector, very little has been achieved even though awareness about the need of reform has increased sharply. It seems that private operators are satisfied with the present system because it serves their own interest.

Although the results are so far limited, a deep impact of APIP may be perceived. The political class and key decision makers are more and more convinced that reforms are badly needed. Awareness is indeed increasing owing to the impact of APIP's high quality studies and the interaction which occurred between the analysts and the various Government staff.

Export commodities:

APIP's contribution in the export sector has been so far very limited. Most of the recommendations made in the studies have not been implemented. One positive impact of the project however is that it created an awareness about the need to take action to conform to the new EEC regulations. The studies undertaken by the project have also provided a useful starting point for the Agribusiness Project to design a program to help the agricultural export sector.

APIP's contribution to capacity building:

The overall results of capacity building given the resources constraint were quite good:

- The supply of just a few computers created a need for additional computers which was satisfied through other sources and the result was the generalization of the use of computers by DG/PDIA staff members. As a consequence, productivity has increased.

- Training programs have increased to some extent the capacity of analysis within the DG/PDIA. A by-product of this activity is the positive attitude towards the project that training has created. The training activity has suffered from three basic deficiencies. First, participants were chosen on the basis of their availability and not qualifications and motivation. Second, there was little relationship between the content of the training program and the specific job requirements of the participants. Third, the time constraint issue of the participants has not been dealt with, which led to a high rate of absenteeism in the courses.

Deficiencies in the organization and management of the project:

In general the project management relied on informal procedures. The responsibility of preparing progress reports and of disseminating results of the studies to concerned institutions and agencies was not assigned to any party. In general, there were at various levels problems of role distribution, of coordination and of dissemination of information. The project could have gained more efficiency by adopting a more formal decision making procedure.

POST APIP AGENDA:

As a result of APIP, major reforms have been implemented in the agricultural sector. However, the process of liberalization is still underway and many problems are yet to be solved. The following activities are suggested for the new Agribusiness Project:

- Continuation of the training programs undertaken by APIP within DGPDI A should be considered. Special attention should be paid to the selection of participants, their availability for training and the design of the training programs to match the participants job requirements.

- There is a need for a study to prepare for the transition of OC and ONH to become stabilizing agencies operating in the framework of a free market system.

- More studies are required (and requested by ONH) in order to obtain more accurate knowledge of the international olive oil market. These studies should lead to an operational plan to penetrate new markets. Many important questions have to be answered: for example, what are the prerequisites to attract an American brand distributor to chose a Tunisian instead of an Italian or Spanish oil exporter? What can the Tunisian side offer to compete with them, despite their subsidy advantage? EC import restrictions and export subsidizing definitely constitute the hardest barrier for Tunisian exports world wide. Should Tunisia retaliate by subsidizing its oil export too?

- In the seafood sector, there is a need to develop joint ventures with foreign partners possessing needed technical expertise and marketing channels. To solve the problem of decreasing production there is a need to attract joint venture partners for aquaculture development activities and undertake applied research regarding the problem of overfishing. A study to identify new markets given the possibility of the reduction of quotas in the EEC market is also highly recommended.

9. LESSONS LEARNED

This section of the report summarizes some lessons learned in implementing APIP. Hopefully, these lessons will be helpful in thinking through the design and implementation of future projects.

9.1. Project Design

9.1.1 Coordinating Committee

The Coordinating Committee discussed in the Project Paper was essential to establishing critical linkages within the key institutions. However, from the onset of the Project it became obvious that its members were at such a high level that it was impossible for them to meet regularly. Since the project was housed in the Ministry of Agriculture's Directorate of Planning and signing authority for project activities and funding was the responsibility of its Director General, decisions about project activities, funding for training and computer equipment remained with this unit. Until the formation of the Steering and Executive Committees, the Project had no official decision-making body and information was not flowing to other ministries or agencies.

1. When a project is hosted by a government, an interministerial committee is vital in getting consensus on priorities, making decisions about project implementation and disseminating information about project activities and results.
2. When the Project Paper proposes a type of committee which is not realistic, look for other solutions to assure high level policy makers are linked to the project.
3. Committee members should be carefully chosen. Members should be at a high enough level to realistically represent their organizations but not so high level as to be too busy to attend meetings. The committee president should assure direct links with the decision-makers. In the case of APIP, the president was a Director General in the Ministry of Economy.
4. Have a qualified administrative assistant/secretary distribute an agenda to committee members before each meeting with minutes from the previous meeting attached. He/she could arrange and attend both the Executive and Steering Committee meetings to assure that minutes are recorded and exchanged.
5. The minutes of each meeting should contain a summary of the discussions, actions to be taken, deadlines, and name the person(s) responsible for each action.

9.1.2 Local Expertise

One of the conditions required of the GOT in the Project Paper was

an increase in DG/PDIA staff to be contracted through the project in years 1 and 2; this same staff was to be kept on as MOA staff thereafter. In this way, the Project would be assured participation of Tunisian experts throughout its life and the GOT would maintain long-term, full-time trained staff members. In fact, a total of 102 person months of local expertise was scheduled throughout the various APIP studies. Unfortunately, the GOT and USAID were unable to solve contracting issues for hiring local expertise and the prime contractor filled the gap by hiring local consultants through their contract funds.

1. The participation of host-country expertise is key to successful project implementation and to the development of local expertise in the host-country. During the project design stage, the Mission should look into realistic ways to ensure such participation.

2. Having the prime contractor subcontract with reputable local consultants and consulting firms is one way to assure host-country participation. This does not, however, help develop the capacity within the host government.

9.1.3 Procurement

Commodity procurement can be lengthy and difficult. Lack of computers and vehicles, for example, can constrain a project's start up. Government staff are not always the most qualified for understanding and projecting their needs. Without a cohesive procurement plan agreed to by all parties, the commodity line item can tend to be a solution to lack of government funding for repairing existing machines rather than an incentive to update technology.

1. Have an expert (local, if possible) assess the present and future procurement (equipment, computers, furniture, etc.) needs for the institutions involved in project implementation at the earliest. The institutional contractor might also have useful insights.

2. Develop an overall procurement plan with government counterparts and with the help of an expert. This should also serve to educate the implementing institutions on the latest technology and its uses.

3. If appropriate, make prime contractor responsible for the actual procurement.

4. If computers are procured locally, heavy consideration should be given to maintenance services provided by the bidders. If procured from the U.S. check out available local maintenance agreements.

5. Assist in training users after technology is procured.

9.2. Implementation

9.2.1 Terms of Reference

Terms of Reference for requested technical assistance were drafted by the GOT and/or the project officer. The GOT counterpart was responsible for setting up a review meeting to discuss with concerned institutions and agencies the purpose of each study and to seek comments and clarifications.

1. The project officer should participate in drawing up the list of attendees to this and other review meetings to assure concerned private sector participation.

2. Giving the appropriate audience the opportunity to understand and participate in the technical assistance from the beginning will afford useful input and assure their future cooperation.

9.2.2 Work Plans and Annual Meetings

The Project Paper identifies and schedules by year analyses and activities to be conducted. In many ways it would have made project planning easier to have followed this schedule, but in reality the Project had to remain flexible to meet the needs of the dynamic policy reform agenda. The annual work plans, or implementation plans, were drafted and distributed for review to the participants before the implementation plan meeting. They summarized the preceding work and outlined a plan for the year to come. The annual meetings were attended by the prime contractor and its major subcontractors; high level officials from the Ministry of Agriculture, Ministry of Plan, and Ministry of Finance; members of the working groups; and the USAID project officer.

1. Maintain flexibility in project implementation but try to stick to a yearly work plan so that technical assistance can be planned sufficiently in advance. This work plan can be updated every six months based on changing priorities and progress made in the program.

2. Draft work plans are a useful tool for discussions of priorities, work to be done, responsibilities and scheduling. Open review of the work plan in the beginning of the year with all concerned parties is an efficient way to discuss progress, priorities and outstanding issues, and come to a consensus on programming.

3. Annual meetings to discuss the implementation plan are a useful forum for bringing together high level officials and lower level analysts - basically, getting the decision-makers together with the worker bees.

9.2.3 Host-country Contracts

Although procedures and concurrences with USAID are lengthy, the GOT regulations are fairly easy for contracting with local firms. Problems occurred, however, when local research institutions were recruited because Tunisian law allows individuals to receive only a small percentage of their daily rate. In the case of host-country contract with the National Agricultural School (INAT), for example, a misunderstanding on the payment of two professors held up the contract for more than a year. Following this experience USAID/Tunis opted for direct contracting which placed the burden on the project officer.

1. Where host-country contracting is funded by USAID, procedures and regulations for both USAID and local government should be established and reviewed at length.
2. Consultants involved should have a clear understanding and agreement of their contractual obligations and payment before they being work.
3. Examples of several types of host-country contracts could be translated into the official language and reviewed by legal advisors at USAID and local government.

9.2.4 Direct Contracts

Direct contracts place the burden on the project officer and can be extremely time-consuming. In the case of four locally contracted studies during FY 92 the process took six months before a study, valued under \$25,000, was initiated. The project officer's tasks for each study consisted of 1) drafting the scope of work; 2) drafting the PIO/T; 3) drafting an RFP and cover letters; 4) contacting local consulting firms; 5) setting up a review committee; 6) reviewing proposals and rating them based on specified criteria; 7) drafting letters to the contracting officer; 8) drafting purchase orders; 9) awarding contract.

1. Procuring technical services under \$25,000 does not require a formal bidding. The project officer should weigh the pros and cons to such a lengthy process and find ways to shorten, within contracting officer guidance, the process.
2. Contact the world of local consulting firms and find out which ones are interested and/or have experience in conducting similar types of studies.
3. The proposed team members are usually the core of a good study. Get assurances that they are really available to conduct the study during the proposed timeframe.
4. The project officer needs to stay in close contact with the

contractor, attend meetings, review drafts, assist in problems of data collection, assure debriefings are attended by appropriate public and private sector participants and follow up with deadlines. Don't expect anything to happen automatically.

5. If a reasonable delay occurs and there are no additional costs, discuss new deadlines with contractor and extend the contract before it expires. This will require a PIO/T and contract amendment but is fairly simple.

9.3. Dissemination

A variety of methods were used to disseminate information about the project and its activities. Many of these were initiated by the prime contractor and continued by the project officer. Brochures, newsletters, announcements were distributed in the various ministries associated with APIP. As the Project moves forward, a greater private sector audience should have access to the information. In the case of new projects, it would be worthwhile to have the prime contractor responsible for all of the following. A well-qualified executive secretary/administrative assistant could handle these types of dissemination activities. Ultimately, however, the host-country organization should take on and institutionalize these activities.

1. Project brochures in French and English are extremely useful for informing public and private sector about project activities. This type of brochure could be updated yearly.

2. Newsletters each month concerning status of studies, announcements of upcoming work and activities, arrival of consultants, workshops help keep issues alive.

3. Roundtables, seminars, workshops provide forums for discussion among public and private sector participants. These discussions can and do provoke policy change.

4. Letters announcing a team's arrival, a brief description of their background and objectives of their study help to open doors to access information, data and cooperation.

9.4 Seminars and Workshops

The Project Paper makes no provision for seminars and workshops. This is an important flaw in the design of any project. APIP's two large policy seminars and other smaller workshops were extremely well attended by both public and private sector, and discussions resulted in proposals and actions for policy reform.

1. Begin a project with a seminar that raises the issues to be studied or addressed during implementation. Such a seminar will bring together the multitude of players, announce and clarify

project objectives, and win the desired support before the project is initiated.

2. Smaller workshops on more specific topics, such as agricultural products for agribusiness, will assist all players in understanding the problems within the sector and arrive collectively at practical solutions or next steps.

3. Periodic seminars or workshops keep the issues alive and bring together interested parties to discuss progress made and where to go next.

4. Experience from other countries with similar problems and conditions can provide helpful information.

10. CONCLUSION

Overall, APIP has achieved its goals and purposes. The Project has been driven by the Tunisian Government's need for assistance in the implementation of its agricultural policy reform program. Through formal and on-the-job training plus a lot of hard work, it has assisted in increasing the capabilities of GOT personnel to conduct policy analysis and draft action plans for decision makers to act upon. Over the life of the Project, the dialogue with the private sector has become an essential ingredient to the successful implementation of liberalization policies. With the change in attitude towards private sector participation in policy decisions and development in the agricultural (and other) sectors, the environment is ready for an agribusiness focus.

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