PD-ABN-631
92678

TIPS

PROJECT YEAR 1

PERIOD

10/01/93 TO 12/31/94

REPORTS

Contract No.: 624-0021-C-00-3080-00
Project No.: PIO/T 657-0021-3-20015
Contractor: LABAT-ANDERSON INC.
USAID Project Office: USAID/Bissau

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TO: Michael Lukomski, Director, USAID/Bissau

FROM: John D. Blacken, TIPS National Coordinator
Wade Channell, Deputy Project Director, LAI

DATE: October 29, 1994

SUBJECT: TIPS REPORTS: PROJECT YEAR 1

Submitted herewith are the TIPS Reports in the form and substance you have previously agreed to and approved in draft. As agreed, these three reports, together with the work plan, constitute our full end-of-year (annual) reporting requirement for the first year of the contract.

1. A Goal Level Report on the 13 project indicators and targets and the eight external factors outlined in the TIPS contract (pages 1-11).

2. A Primary Objective Report including a summary, sections on each of the eight CGSs (rice, cashew, fruits, vegetables, forestry, fisheries, general commerce, and general services), proposed research and a bibliography (pages 1 - 110).

3. A Work Plan Status Report broken down by technical component at the output and sub-output levels (pages 1 - 86).

TIPS

PROJECT YEAR I

PERIOD
10/01/93 TO 12/31/94

REPORTS

TIPS

PROJECT YEAR I

REPORTS

INDEX

CÓDIG[illegible]ARA O WORK PLAN

HUMAN INPUTS		
CODE	WHO/SPECIALITY	SOURCE/RESPONSIBLE
LTX1 - John Blacken	POL - Policy	MSI - Management Systems International
LTX2 - Lourival Zagonel	LEG - Legal Judicial	SUN - State University of New York - Albany
LTX3 - Jim LaFleur	PVT - Private Sector	LAI - Labat Anderson Incorporated
LTL1 - Josué Almeida	ECO - Economist	MSI - Management Systems International
LTL2 - Anildo Cruz	L&J - Lawyer & Judges	LAI - Labat Anderson Incorporated
LTL3 - Mamadu Badji	AGB - Agribusines	LAI - Labat Anderson Incorporated
LTL4 - António Alcala	AGE - Agrieconomist	LAI - Labat Anderson Incorporated
LTL5 - Dauda Sou	TRN - Training	AFC - Africare
	NBE - Noble	TIPS
STX/L(n)	TBD - To be designated	
n - Number of Component		
followed by the name and		
number of visits		

TRAINING INPUTS		
CODE	TYPE	WHERE
TR-L - Training Local	Conf - Conference	US - United State
TR-OS - Training Off-Shore	R-Table - Round Table	BR - Brazil
	Sem - Seminar	PT - Portugal
	Stu-Vis - Study Visit	TC-A Third Country Africa
	Work - Workshop	TC-O - Third Country Other
	Trade - Trade Mission	GB-B - Guinea-Bissau - Bissau
	Course	GB-I - Guinea-Bissau - Interior

COMMODITY INPUTS		
CODE		
COM - Commodity		

MISCELLANEOUS		
CODE		
MIS - Miscellaneous		

KEY - TECHNICAL COMPONENT SUMMARIES OF AEPs BY MONTH STATUS

	Scheduled Activity of AEP
=	Actual Activity of AEP
	Scheduled Completion of AEP
X	Actual Completion of AEP

T I P S

GOAL LEVEL REPORT

PERIOD

10/1/93 TO 12/31/94

REPORT ON PROJECT GOAL

1. Introduction

This report on the TIPS Contract Project Goal is organized in two parts. One contains the report on Goal Level Indicators and Targets. The second covers external factors influencing the project goal.

The Goal Level Indicator and Target report provides data in the 13 goal level indicators and targets concerning economic growth, whether it is market-oriented, broad-based, and sustainable, domestic and international trade, and investment. Adequate data was not available for five indicators and for these proxies were established. In all cases where hard data was available, sources have been identified.

The external factor section includes information on: the International Monetary Fund (IMF) and World Bank stabilization program, transformation to a multi-party democracy, donor support, the impact of weather on the country's economy, world and domestic prices, and financing for trade and investment activities. To facilitate reference to the TIPS contract, the sections of this report are numbered according to the indicators, targets, and external factors outlined in the TIPS contract.

(3) Goal Indicator 3. Market-Oriented: For each year during the period 1993-1998 the number of administratively determined prices does not increase above 1992 levels, and those that are administratively determined continue to reflect world prices.

						Base Year						Goal
YEAR	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
No. of Administratively Determined Pr	26						4	3	0				0
Source: Ministry of Finance													

A national conference on commercial law sponsored by TIPS was held in March of this year. This conference include the public and private sectors. Both the formal and informal private sectors were repı
One of the most important recommendations that the government adopted and put into law was the elimination of all price controls.

(4) Goal Indicator 4. Broad-Based: For each year during the period 1993-1998, at least 60% of rural households report annual increased "income" over previous year.

							Base Year						Goal
RURAL HOUSEHOLDS INCOMES\ YEAR	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Growth Rate (ave. yearly % change)													
Index (1992=100)													
Source: Ministry of Finance													

This goal indicator is not only unavailable but also difficult to measure. For this reason, a proxy "4a" was used.

(4a). *Goal Indicator proxy 4a.* Broad-Based: Cashew production and estimated total producer cashew income.

							Base Year						Goal
CASHEW PRODUCTION/YEAR	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Production in tons	7,000	9,000	10,000	10,000	19,450	28,080	30,160	32,240	34,320				42,640
Producer income in US$ 1,000	1,330	1,980	2,070	1,800	3,890	4,212	4,222	8,060	10,639				19,188
Index-producer income (1992=100)	31.5	46.9	49.0	42.6	92.1	99.8	100.0	190.9	252.0				
Source: Cashew report													

The proxy used is income increases to the 37 thousand cashew producers represents approximate 42% of the rural producer.
Also it is assumed that as cashew produces income increases their demand for food also increases as they substitute food (rice) production for their cash crop. This demand for food, mainly rice increase the cash income of some of the non-cashew producer households, especially producers of rice.
italic numbers are estimates found by simple geometric progression
* extrapolations

(5) Goal Indicator 5. Sustainable: For each year during the during the period 1993-1998, the current account deficit on the balance of payments is reduced by at least 3 percent a year.

AR/CURRENT ACCOUNT ($US millions)	1986	1987	1988	1989	1990	1991	Base Year 1992	1993	1994*	1995	1996	1997	Goal 1998
Balance of payment						-42.66	-68.49	-25.40	-15.40				
Annual percent change							61%	-63%	-39%				
Trade (net)						-47.03	-77.04	-37.86	-9.57				
Imports						-67.47	-83.51	-53.82	-27.41				
Exports						20.44	6.47	15.96	17.84				
Services (net) of which						-33.77	-30.29	-29.58	-10.43				
Interest						-17.04	-13.49	-15.81	-5.27				
Fishing Licenses						13.49	13.49	10.78	8.90				
Transfers (net)						38.13	38.84	42.04	21.59				
Official						42.26	39.48	43.69	21.85				
Private						-4.13	-0.64	-1.65	-0.26				
Source: Central Bank													

* - 1° semester

In 1992, the current account deficit climbed sharply, due mainly to the poor performance of the trade balance (deficit of $77 million) while the services and transfers remained relatively stable. Cashews, the leading currency earner, suffered a strong setback, posting $3 million in earnings while the original projection was $15 million. This decline in export earnings was the result of cashew exporters holding back their exports in protest against the high level of export tax. During the first six months of 1994 there was a positive trade balance of1.6 million. This was primary the result of cashew exports and a slowing of imports.

Guinea-Bissau cannot continue to maintain such current account deficits. The best solution is to increase exports as well as formalizing and capturing informal exports.

(6) Goal Indicator 6. Sustainable: For each year during the period 1993-1998, the gap between government (tax) revenues and expenditures is reduced by at least 3 percent a year.

YEAR	1986	1987	1988	1989	1990	1991	Base Year 1992	1993	1994	1995	1996	1997	Goal 1998
Tax Revenue (billions of current pesos)						56.3	60.2	121.0					
Current Expenditure (billions of current pesos)						164.5	250.6	319.1					
Tax Revenues/Expenditures (percent)						34%	24%	38%					6%
Annual Percent Change-Tax Revenues/Expenditures							-29.81%	57.85%					
Source: Ministry of Finance													

The strong performance in 1993 reflects the government's decision to step up its efforts in collecting the previous year's tax import credits and in eliminating most tax exemptions. The tax revenue for 1994 have increased considerable due to record cashew exports.

The IMF/World Bank is very positive about Guinea Bissau's performance under the shadow program. In the period under analysis, tax collection has improved enough to contribute to the dramatic increase in revenues. This strong performance reflects the government's announced decision to step up its efforts in collecting and to eliminate most tax exemptions. The government also expects that the export tax contribution to revenue will increase by the fact that cashew exports are at record levels - from the GOGB currently has a 20% export tax on cashew). This increasing growth of tax revenue is paired with a declining rate of growth of expenditures, meaning that the GOGB is beginning to take control of its spending. The in Bissau observed that discipline in cutting back spending has been excellent, enforced by the Ministry of Finance. The World Bank is giving the Ministry of Finance the tools (training, computer systems) to bring spending under control.

The increasing importance of tax revenue as a source of government revenue can also be seen through the dynamic in the structure of public revenue..

From 1992 to 1993, tax revenue's contribution to total government revenue increased from 36% to 49%, while non-tax revenue share went down from 53% to 44%. External revenue share also declined from 11% to 7%. This demonstrates that the government is reducing its reliance on unsustainable sources of revenue, i.e., external finance, fishing lice and borrowing from the Central Bank.

This part of stabilization/structural adjustment is very hard for formerly socialist economics. It is even harder for Guinea Bissau, where the level of development and the poverty of the government is suc systems for control never really existed. To pull itself out of its debt and monetary crisis, and reduce the over-sized public sector, the GOGB must maintain over long term the positive progress made in t

(7) Goal Indicator 7. Domestic Trade (Formal Sector): By 1998, the number of commercial firms registered will have increased by 25% over the number of commercial firms registered in 1992.

YEAR	1986	1987	1988	1989	1990	1991	Base-Year 1992	1993	1994*	1995	1996	1997	Goal 1998
Number of commercial firms registered							2,119	2,407	2,583				2649
Index (1992=100)							100	113.6	121.9				125.0
Source: Ministry of Commerce													

*.- 1° semester of 1994

(7a) Goal Indicator 7a. Domestic Trade (Formal Sector): By 1998, the number of National Business Associations registered will have increased.

YEAR	1986	1987	1988	1989	1990	1991	Base-Year 1992	1993	1994	1995	1996	1997	Goal 1998
Number of national business associations			0	1			1	3	8				
Number of members of business associations			0	350			700	2280	4450				
Index-members of business associations (1992=100)				50.0			100	325.7	635.7				
Source: Chamber of Commerce													

Esta proxy serve de complemento ao indicador do ponto 7.

According to the Ministry of Commerce, registered commercial establishments and individuals increased by 21.9% over the 18 month period 1992 to June 1993, reaching a total of 2,583 registrations.

(8) Goal Indicator 8. Domestic Trade (Semi-formal) Sector): By 1998, the number of applications for stalls will have increased by 25% over the number of applications for stalls in 1992.

YEAR	1986	1987	1988	1989	1990	1991	Base-Year 1992	1993	1994	1995	1996	1997	Goal 1998
Applications for stalls at formal markets							n.a.	n.a.	n.a.				
Index (1992=100)													
Source: n.a.													

(8a) Goal Indicator 8a. Domestic Trade - Semi-formal marketing business in public market through out the country will have increased by 25% over the number in 1992

YEAR	1986	1987	1988	1989	1990	1991	Base-Year 1992	1993	1994	1995	1996	1997	Goal 1998
Number of markets	22	22	23	24	25	28	30						
Index (1992=100)	73.3	73.3	76.7	80.0	83.3	93.3	100						125.0
Number of merchants	5,000						14,500	16,400	18,500				
Index (1992=100)	34.5						100	113.1	127.6				125.0
Source:													

Esta proxy foi escolhida, por se julgar que os vendedores do mercado representam de certa forma o sector semi-formal e informal.

Estes dados, embora tenham sido calculados por estrapolação, tomando como base o estudo Crowley, demonstra o grande crescimento da actividade comercial, sobretudo no sector semi-formal (feirantes) e informal (vendedores ambulantes e vendedores em lumos).

(9) Goal Indicator 9. Domestic Trade (Informal Sector): By 1998, the number of rural households reporting (i) money income, (ii) part of production sold, and (iii) part of consumption purchased increased by 25% over the 1992 levels.

YEAR	1986	1987	1988	1989	1990	1991	Base-Year 1992	1993	1994	1995	1996	1997	Goal 1998
Informal Sector: the no. of rural households													
reporting money income,							n.a.	n.a.	n.a.				
part of production sold,							n.a.	n.a.	n.a.				
part of consumption purchased							n.a.	n.a.	n.a.				
Source: n.a.													

(9a) Goal Indicator 9a. Domestic Trade - Semi-formal marketing business in public market through out the country

YEAR	1986	1987	1988	1989	1990	1991	Base-Year 1992	1993	1994	1995	1996	1997	Goal 1998
Number of markets	22	22	23	24	25	28	30						
Index (1992=100)	73.3	73.3	76.7	80.0	83.3	93.3	100						125.0
Number of merchants	5,000						14,500	16,400	18,500				
Index (1992=100)	34.5						100	113.1	127.6				
Source:													

Esta proxy foi escolhida, por se julgar que os vendedores do mercado representam de certa forma o sector semi-formal e informal.

(10) Goal Indicator 10. External Trade: By 1998, total export earnings from cashews, wood and wood products, fish and fish products, fruits and vegetables will have increased by 25% over their 1992 levels.

YEAR	1986	1987	1988	1989	1990	1991	Base-Year 1992	1993	1994*	1995	1996	1997	Goal 1998
Total Export Earnings (US$ millions/fob)				14.20	19.26	20.44	6.47	15.96	26.36				
Cashews				7.12	11.61	14.07	3.01	12.98	25.00				11.19
Fish and Fish Products				2.16	3.34	2.56	0.84	0.70	0.16				2.78
Wood and Wood Products				1.00	2.45	1.42	1.29	1.19	0.20				1.93
Fruits and Vegetables a/	na	na	na	na	na	na	na	na	na				
Other				3.92	1.86	2.39	1.30	6.10	1.00				
Index-export earnings (1992=100)				219.5	297.7	315.9	100	246.7	407.4				125.00
Source: Central Bank (DGAlfândegas)													

a/ Data are included in the other"export product category due to insignificant levels.

* - 1° semestre

Cashew, the most important exportable product of the country, represents more than 90 percent of the total exportations projected for this year.
There has been an estimated 36 thousand tons exported at a value of more than US$25 million. Exports of forest products during 1992
period of the previous year decreased 77,3%, due to the limitation of logging. Also fishing has had a weak performance decreasing 19,2% compared with the same period of the previous year.

(11) Goal Indicator 11. External Trade: By 1998, the productive input component of imports (capital goods) increased will have increased by 25% over their 1992 level.

YEAR	1986	1987	1988	1989	1990	1991	Base Year 1992	1993	1994*	1995	1996	1997	Goal 1998
Capital Goods Imported (US$ millions)							26.8	31.0	13.1				125
Index (1992=100)							100.0	115.7	48.9				
Source: Central Bank													

* - 1° semestre

(12) Goal Indicator 12. Investment: By 1998, the number (value) of foreign and domestic applications approved and implemented in the critical growth sub-sectors under the new investment code adopted in 1991 will have increased by 100% over their 1992 levels.

YEAR	1986	1987	1988	1989	1990	1991	Base Year 1992	1993	1994	1995	1996	1997	Goal 1998
No. of approved applications							n.a.	n.a.	n.a				
Value of approved applications							n.a.	n.a.	n.a				
Source: Ministry of Finance													

(12a) Goal Indicator 12a. Investment: By 1998, the number (value) of foreign and domestic applications approved and implemented under the new investment code (GAI) adopted in 1991 will have increased by 100% over their 1992 levels.

YEAR	1986	1987	1988	1989	1990	1991	Base Year 1992	1993	1994	1995	1996	1997	Goal 1998
No. of applications						12	13	16	22				26
No. of approved applications													
Source: Ministry of Finance/GAI													

Esta proxy foi escolhida por não haver dados disponíveis sobre os investimentos no CGS.

(13) Goal Indicator 13. Investment: By 1998, private investment will have increased to about 5 percent of GDP.

YEAR	1986	1987	1988	1989	1990	1991	Base Year 1992	1993	1994	1995	1996	1997	Goal 1998
Private investment as percentage of GDP						1.8	1.4	1.4					5.0
Source: Ministry of Finance													

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REPORT ON PROJECT GOAL

3. External Factors

a. IMF and World Bank Stabilization Plans

The latest IMF/world Bank assessment, made in April 1994, of Guinea Bissau's performance gave the GOGB very high ratings for its performance under the shadow structural adjustment program during the previous 16 months. IMF officials described Guinea Bissau's performance as one of the best in Africa. Inflation had been brought down from to an annual rate of 16%. The IBRD and the GOGB are in the final stages of developing a $9 million "Agriculture Land and Environmental Management Project". In addition, an $2 million infrastructure and feeder road project is being developed. All indications are that this performance will continue.

b. Transformation to Multi-Party Democracy

During 1994, Guinea Bissau continued its steady progress toward a functioning multi-party democratic system. A process, which started with constitutional changes during 1990 and 1991 had been underway for three years. Elections had been postponed several times due mainly to logistical and organization problems as those planning the elections had no previous experience to act on. During a hotly contested election campaign conducted in a free atmosphere, 12 political parties (five in a coalition group) fielded candidates for the Popular National Assembly and eight candidates contested for the Presidency. In the July 3 elections, five parties obtained seats in the 100-seat Assembly. The ruling Partido Africana para a Independencia da Guiné e Cabo Verde (PAIGC) won a majority of 62 seats in the Assembly. The PAIGC's presidential candidate, President Joao Bernardo Vieira, won a plurality and went on to win a majority of 52% in a run-off election on August 7. The opposition candidate conceded defeat. The international observer team certified the elections to have been free and fair. Guinea Bissau's first democratically elected President was inaugurated to office on September 29.

A constitutional amendment in 1992 separated the judicial system from under the supervision of the Justice Ministry and in 1993 a separate budget was provided for the court system. A new system of 38 district (small claims) courts was established to bring formal justice to interior towns and villages for the first time.

There are active civic organizations which are learning to play an important role in Guinean society, politics and the economy. An active human rights league has 3,000 members and has and is active in identifying humans rights problems when they arise. It hosted an international conference on human rights issues in Bissau during the year. A Chamber of Commerce, Industry and Agriculture (CCIA), organized in 1989, is gradually learning how to represent the interests of its members. It co-sponsored with the gradually learning how to represent the interests of its members. It co-sponsored with the Ministry of Commerce and Industry and TIPS a National Conference on Commercial Policy and Legislation which resulted in a number of policy and legislation reforms. New national level associations representing women in commerce, agricultural producers, artesanal fishermen and most recently one representing small businessmen in the dynamic informal sector, have been organized. The latter, the Association of Small Businessmen, was established during May following the National Conference and already has the largest membership of any association in the country.

c. Donor Support

Overall donor support appears to be declining slightly. Due to various factors, including an unfavorable evaluation of performance, mainly concerning sustainability, of previous and ongoing projects, the Swedish assistance program is being evaluated and shifts in emphasis are expected, probably with more emphasis on stimulating private production in agriculture and discontinuance of large regional projects. During 1994 no new dispersals or programs were launched. UNDP and EEC programs appear to be continuing at previous levels, albeit with some shifts in emphasis. For example, the UNDP is developing a project aimed at stimulating private sector development. Taiwan has taken over the previous PRC rice project near Bafata, the hospital in Cantchungo, and has provided $2 million in funding for a credit program for Guinean fishermen. However, for the latter, it is still looking for a means of managing the credit.

d. Weather Disturbances

The 1994 rains began on schedule in late May and continued into October. While August rains were slightly less than usual, September saw heavy rains which continued into early October. It was a good year. Locusts were reported in some northern parts of the country but to date no serious threat is evident.

e. World and Domestic Prices in Critical Growth Sectors

The international prices for Guinea Bissau's two largest crops, rice and cashews, have risen slightly over prices of the last two years. The prices of other CGS products--fruits and vegetables, forestry and fish products generally held at previous levels during 1994. TIPS is planning to do a study of international prices of CGS products and publish market data for producers.

f. Donor/GOGB Support for Physical Infrastructure

During the year support for physical infrastructure continued at previous levels.

Improvement, including hard surfacing of the road to Biombo was nearly completed. Interior transportation was seriously impeded, however, by deterioration of ferry services to several parts of the country. For example, the ferry to Farim, once a trading town in the north, has been out of service for two years. However, the EEC is providing funds for replacing three ferries sometime later this year or early next year. The World Bank is developing a project to improve the feeder road system. Telecommunications with the outside world have improved dramatically since the late 1980s and are generally good. However, the domestic system, especially in some areas of Bissau continues to be plagued by outages in phone services. Construction of a new fishing port for use by artesanal fishermen, financed by Taiwan, is scheduled to begin next year.

g. Donor/GOGB Support for Social Services

The GOGB's austerity program and lack of funds has led to deterioration of social services such and health and education. Donor support for these services is also declining and no increase is immediately foreseen.

h. Domestic and/or International Financing

Some short-term credit (up to 169 days) for financing trade is available from local banks. Moderate amounts of credit is available in the informal sector for financing trade. However, credit for medium and long-term investments is not available from domestic or international sources.

TIPS

SUMMARY

PRIMARY OBJECTIVE REPORT

PERIOD

10/1/93 TO 12/31/94

1. CGS PRODUCTS - BASE-YEAR 1992	units	Rice	Cashew	Fruit	Veg	Forest	Fish
VOLUME							
Production - national	tons	123,612	30,160	63,070	6,929	2,200,000	106,173
artisan	tons						15,000
licenced - international	tons						91,173
Processing							
primary	tons	80,348			neg		3,000
secondary	tons						
final	tons						
Marketing:							
domestic							8,000
formal							
raw	tons	neg		1,342	6,929		
processed							
primary	tons	143,286	neg		neg		
secondary	tons						
final	tons						
informal							
raw	tons	neg	1,000		mix	1,500,000	
processed							
primary	tons	mix	neg		neg		
secondary	tons						
final	tons						
exports							
formal							230
raw	tons		3,650	19	neg	5,201	
processed							
primary	tons	0	0		0	204	
secondary	tons					215	
final	tons						
licenced	tons						91,173
informal							8,000
raw	tons		5,000		neg		
processed							
primary	tons	13,000	0		0		
secondary	tons						
final	tons						
imports							
formal	tons	75,720	0	neg	neg	neg	neg
informal	tons	218	0	neg	neg	neg	neg

Overall Economic Score	Rice	Cashew	Fruit	Veg	Forest	Fish
Supporting Commerce						
General	5	5	5	5	5	5
Specific	6	7	1	1	4	3
Supporting Services						
General	4	4	4	4	4	4
Specific	3	4	3	2	3	4

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

- 0 to 2 little or no support
- 3 to 4 some support
- 5 medium support
- 6 to 7 good support
- 8 to 10 excellent support

1. RICE	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons	125,000	141,942	88,383	105,859	118,834	123,564	123,612	119,657	126,574				127,000
Processing														
primary	tons	81,250	92,262	57,449	68,808	77,242	80,317	80,348	77,777	82,273				82,550
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons	117,373	122,262	85,449	97,505	109,510	127,665	143,286	130,047	124,017				125,000
informal	tons													
exports														
formal	tons							0						100,000
informal	tons	5,000	8,000	9,000	10,000	11,000	12,000	13,000	14,000	15,000				
imports														
formal	tons	41,123	38,000	37,000	38,697	43,268	59,348	75,720	66,270					142,450
informal	tons							218						
PRICE														
producer	US$/t	101	89	77	94	42	109	94	107	104				100
domestic														
national	US$/t	217	329	326	361	300	324	290	368.	104				300
imported	US$/t	217	329	326	361	300	324	343	436	430				
exports														
formal	US$/t													320
informal	US$/t	271	411	407	451	375	405	290	460	130				
imports														
formal	US$/t	181	274	272	301	250	270	286	260	280				270
informal	US$/t							290						
VALUE														
producer	US$m	12,648	12,696	6,770	9,920	5,031	13,438	11,620	12,788	13,164				12,713
domestic														
formal	US$m	25,451	40,215	27,850	35,160	32,866	41,379	41,553	47,857	12,898				37,500
informal	US$m													
exports														
formal	US$m													32,000
informal	US$m	1,355	3,289	3,667	4,508	4,127	4,862	3,270	6,440	1,950				
imports														
formal	US$m	7,431	10,416	10,049	11,638	10,821	16,110	21,650	10,821	10,821				38,462
informal	US$m							55						

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4. VEGETABLES			
	Overall Economic Score		
Supporting Commerce			7
General	0	5	7
Specific	0	6	
Supporting Services			6
General	3	4	8
Specific	0	3	

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

- 0 to 2 little or no support
- 3 to 4 some support
- 5 medium support
- 6 to 7 good support
- 8 to 10 excellent support

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2. CASHEW	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons	7,000	9,000	10,000	10,000	19,450	28,080	30,160	32,240	38,000				42,640
Processing														
primary	tons										50	200	600	2,000
secondary	tons													
final	tons													
Marketing:														
domestic														
in-shell														
formal	tons													2,000
informal	tons	400	500	600	700	800	900	1,000	1,100	1,200				
shelled														
formal	tons													
informal	tons													
exports														
in-shell														
formal	tons	5,995	10,400	10,500	9,414	16,409	18,250	3,650	21,200	36,000				31,640
informal	tons					2,000	3,000	5,000	7,000					1,000
shelled														
formal	tons										50	200	600	2,000
informal	tons													
PRICE														
producer	US$/t	190	220	290	180	200	150	140	290	310				450
domestic														
in-shell														
formal	US$/t													495
informal	US$/t	238	275	363	225	250	188	175	363	388				0
shelled														
formal	US$/t													4,000
informal	US$/t													0
exports														
in-shell														
formal	US$/t	860	1,033	851	755	708	695	825	752					700
informal	US$/t					275	206	193	399	426				545
shelled														
formal	US$/t						6,063	5,440	5,252	5,423				5,000
informal	US$/t													0

VALUE													
producer			US$m	1,330	1,980	2,900	1,800	3,890	4,212	4,222	9,350	10,639	19,188
domestic													
	in-shell												
		formal	US$m										990
		informal	US$m	95	138	218	158	200	169	175	399		0
	shelled												
		formal	US$m										8,000
		informal	US$m										
	Total			95	138	218	158	200	169	175	399		8,990
exports													
	in-shell												
		formal	US$m	5,156	10,743	8,936	7,108	11,618	12,684	3,011	15,942		22,148
		informal	US$m					550	619	963	2,791		545
	shelled												
		formal	US$m										10,000
		informal	US$m										
	Total			5,156	10,743	8,936	7,108	12,168	13,303	3,974	18,734		32,693

FRUIT	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
OLUME														
Production	tons							63,070						
Mangos	tons							58,070						
Bananas	tons					3,000	4,000	5,000						
citrus	tons													
pineapple	tons													
Processing														
primary	tons													
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons							1,342						
Mangos	tons							613						
Bananas	tons							240						
citrus	tons							489						
pineapple	tons													
informal	tons													
exports														
formal	tons						250			75				
Mangos	tons			19	38		85	19	19	36				
Bananas	tons													
citrus	tons													
pineapple	tons													
informal	tons						9,038							
imports														
formal	tons													
informal	tons						876							

2. CASHEW	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons	7,000	9,000	10,000	10,000	19,450	28,080	30,160	32,240	38,000				42,640
Processing														
primary	tons										50	200	600	2,000
secondary	tons													
final	tons													
Marketing:														
domestic														
in-shell														
formal	tons													2,000
informal	tons	400	500	600	700	800	900	1,000	1,100	1,200				
shelled														
formal	tons													
informal	tons													
exports														
in-shell														
formal	tons	5,995	10,400	10,500	9,414	16,409	18,250	3,650	21,200	36,000				31,640
informal	tons					2,000	3,000	5,000	7,000					1,000
shelled														
formal	tons										50	200	600	2,000
informal	tons													
PRICE														
producer	US$/t	190	220	290	180	200	150	140	290	310				450
domestic														
in-shell														
formal	US$/t													495
informal	US$/t	238	275	363	225	250	188	175	363	388				0
shelled														
formal	US$/t													4,000
informal	US$/t													0
exports														
in-shell														
formal	US$/t	860	1,033	851	755	708	695	825	752					700
informal	US$/t					275	206	193	399	426				545
shelled														
formal	US$/t						6,063	5,440	5,252	5,423				5,000
informal	US$/t													0

VALUE													
producer			US$m	1,330	1,980	2,900	1,800	3,890	4,212	4,222	9,350	10,639	19,188
domestic													
	in-shell												
		formal	US$m										990
		informal	US$m	95	138	218	158	200	169	175	399		0
	shelled												
		formal	US$m										8,000
		informal	US$m										
	Total			95	138	218	158	200	169	175	399		8,990
exports													
	in-shell												
		formal	US$m	5,156	10,743	8,936	7,108	11,618	12,684	3,011	15,942		22,148
		informal	US$m					550	619	863	2,791		545
	shelled												
		formal	US$m										10,000
		informal	US$m										
	Total			5,156	10,743	8,936	7,108	12,168	13,303	3,974	18,734		32,693

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FRUIT	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
OLUME														
Production	tons							63,070						
Mangos	tons							58,070						
Bananas	tons					3,000	4,000	5,000						
citrus	tons													
pineapple	tons													
Processing														
primary	tons													
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons							1,342						
Mangos	tons							613						
Bananas	tons							240						
citrus	tons							489						
pineapple	tons													
informal	tons													
exports														
formal	tons						250			75				
Mangos	tons			19	38		85	19	19	36				
Bananas	tons													
citrus	tons													
pineapple	tons													
informal	tons						9,038							
imports														
formal	tons													
informal	tons						876							

CE											
producer	US$/t										
Mangos	US$/t							150			
Bananas	US$/t							206			
citrus	US$/t							178			
pineapple	US$/t										
domestic											
formal	US$/t										
Mangos	US$/t										
Bananas	US$/t										
citrus	US$/t										
pineapple	US$/t										
informal	US$/t										
exports											
formal											
Mangos	US$/t			1940	1780	2000	2000	2150	2720		
Bananas	US$/t										
citrus	US$/t										
pineapple	US$/t										
informal	US$/t										
imports											
formal	US$/t										
informal	US$/t										
ALUE											
producer	US$m										
Mangos	US$m							8,687			
Bananas	US$m										
citrus	US$m										
pineapple	US$m										
domestic											
formal	US$m										
Mangos	US$m							92			
Bananas	US$m							49			
citrus	US$m							87			
pineapple	US$m										
informal	US$m										
exports		0	0	0	0	0	0	0			0
formal											
Mangos	US$m			37	68	0	170	41	52		
Bananas	US$m										
citrus	US$m										
pineapple	US$m										
informal	US$m						1,530				
imports		0	0	0	0	0					0
formal	US$m										
informal	US$m						1,670				

3. FRUIT		Overall Economic Score		
Supporting Commerce	General	0	5	7
	Specific	0	6	7
Supporting Services	General	3	4	6
	Specific	0	3	8

Definition:
Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business
Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:
- 0 to 2 little or no support
- 3 to 4 some support
- 5 medium support
- 6 to 7 good support
- 8 to 10 excellent support

4. VEGETABLES	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons	229	660	2,582	4,035	4,721	5,014	6,929	7,744					127,000
Processing														
primary	tons													82,550
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons							6,929						125,000
informal	tons													
exports														
formal	tons													100,000
informal	tons													
imports														
formal	tons													142,450
informal	tons													
PRICE														
producer	US$/t	184	89	77	94	42	109	94	107					100
domestic														
formal	US$/t	217	329	326	361	300	324	290						300
informal	US$/t													
exports														
formal	US$/t													320
informal	US$/t	239	362	359	397	330	357	319						
imports														
formal	US$/t	181	274	272	301	250	270	273						270
informal	US$/t													
VALUE														
producer	US$m	42	59	198	378	200	545	651						12,713
domestic														
formal	US$m	0	0	0	0	0	0	2,009						37,500
informal	US$m													
exports														
formal	US$m													32,000
informal	US$m	0	0	0	0	0	0	0						
imports														
formal	US$m	0	0	0	11,638	10,821	16,110	21,650						38,462
informal	US$m													

4. VEGETABLES

		Overall Economic Score		
Supporting Commerce				
	General	0	5	7
	Specific	0	6	7
Supporting Services				
	General	3	4	6
	Specific	0	3	8

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

- 0 to 2 little or no support
- 3 to 4 some support
- 5 medium support
- 6 to 7 good support
- 8 to 10 excellent support

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5. FORESTRY	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	m3							2,200,000						
Processing														
primary	tons													
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons													
primary														
secondary														
final														
informal														
fuelwood	m3							1,500,000						
charcoal	m3													
exports														
formal														
logs	tons	2,015	4,020	3,079	3,080	5,975	5,420	5,201						
sawed wood	tons	1,787	787	911	970	3,009	122	204						
others	tons	141	170	57	180	158	208	215						
informal														
wood	m3													
charcoal	m3													
imports														
formal	tons													
informal	tons													
PRICE														
producer	US$/t													
domestic														
formal	US$/t													
informal	US$/t													
exports														
formal														
logs	US$/t		333	250	172	216	214	210						
sawed wood	US$/t		200	238	299	306	410	343						
others	US$/t			5,263	1,111	1,266	962	465						
informal														
imports														
formal	US$/t													
informal	US$/t													

VALUE									
producer	US$m						0		
domestic									
formal	US$m								
informal	US$m								
exports									
formal									
logs	US$m	1,340	770	530	1,290	1,160	1,090		
sawed wood	US$m	157	217	290	920	50	70		
others	US$m		300	200	200	200	100		
informal									
imports									
formal	US$m								
informal	US$m								

5. FOREST	Overall Economic Score		
Supporting Commerce			7
General	0	5	
Specific	0	6	7
Supporting Services			
General	3	4	6
Specific	0	5	8

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

0 to 2 little or no support
3 to 4 some support
5 medium support
6 to 7 good support
8 to 10 excellent support

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. FISH	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production total	tons					125,769	112,776	106,173	93,204					
artisan	tons				10,000	10,000	15,000	15,000	47,500					
formal	tons				5,400	7,990	4,800	2,200	3,500					
informal	tons				4,600	2,010	10,200	12,800	44,000					
licenced - international	tons					115,769	97,776	91,173	45,704					
shrimp	tons								2,500					
Demersals	tons													
Pelagicos	tons													
Cephalopodos	tons													
Processing														
primary	tons				680	1,490	2,250	3,000						
secondary	tons													
final	tons													
Marketing:														
domestic								8,000	8,035					
formal	tons													
informal	tons													
exports														
formal		430	111	370	680	1,490	2,250	230	920					
frozen shrimp	tons	176	83	173	280	450	360	110	20					
frozen fish	tons	254	19	186	400	1,020	1,890	30	830					
others	tons			11	0	30	0	90	70					
licenced	tons					114,769	96,776	91,173	45,704					
informal	tons				3,000	3,000	8,000	8,000	40,500					

PRICE									
international									
shrimp	US$/t							4,500	
Demersais	US$/t							1,200	
Pelagicos	US$/t							1,500	
Cephalopodos	US$/t							2,800	
artisan									
formal	US$/t								
informal	US$/t								
Processing									
primary	US$/t								
secondary	US$/t								
final	US$/t								
Marketing:									
domestic									
formal	US$/t								
informal	US$/t								
exports									
formal	US$/t								
frozen shrimp	US$/t	4,000	5,000	7,000	6,044	4,166	6,363	4,000	
frozen fish	US$/t	1,000	714	500	599	561	595	614	
others	US$/t								
informal	US$/t								

VALUE									
international	US$m								
shrimp	US$m							11,250	
Demersais	US$m								
Pelagicos	US$m								
Cephalopodos	US$m								
artisan									
formal	US$m								
informal	US$m								
Processing									
primary	US$m								
secondary	US$m								
final	US$m								
Marketing:									
domestic									
formal	US$m								
informal	US$m								
exports									
formal	US$m								
frozen shrimp	US$m	332	865	1,960	2,720	1,500	700	80	
frozen fish	US$m	19	133	200	611	1,060	18	510	
others	US$m								
informal	US$m								

6. FISH				
	Overall Economic Score			
Supporting Commerce				7
General	0	5		
Specific	0	6		7
Supporting Services				
General	3	4		6
Specific	0	3		8

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

0 to 2 little or no support
3 to 4 some support
5 medium support
6 to 7 good support
8 to 10 excellent support

I. RICE

1. HISTORY

Rice has been and is the most important subsistence crop in Guinea-Bissau. Rice cultivation is practiced by nearly all of the 100 thousand households that make up the rural population of Guinea-Bissau and is consumed at almost every meal by the majority of the population.

Guinea-Bissau and Liberia are the two West African countries with the highest per capita rice consumption (approx. 105 kg per year). Thus, rice production is not only an economic issue but has considerable social, cultural and political implications.

1.1. Production

Rice production has increased by less than 1% per year over the last 40 years, up from approximately 100 thousand tons in 1953 to around 125 thousand tons in 1993. The war and the change in the economic system (going from a colonial mercantile economy to a command economy), during this period negatively impacted on the production of rice, thus, the increase of only 25 thousand tons.

There are three different rice production systems in Guinea-Bissau: "bolanha salgada", or salt water flats rice; " Pam-Pam" - sequeiro, or dry land cultivation; and "bolanha doce" or fresh water rice production.

"Bolanha salgada", or salt water rice flats cultivation, on reclaimed salt water mangrove swamps, has increased from 6.7 thousand hectares in 1988 to about 12 thousand hectares in 1993. Production has grown from 19.7 thousand tons in 1988 to approximately 21.6 thousand tons in 1993. However, productivity has decreased by 39% over the last 5 years from an estimated 2,940 kilos per hectare to 1,800 kilos per hectare .

"Sequeiro", or dry land rice cultivation, is normally planted in very fragile sandy soils. This system, associated with slash and burn type agriculture, accelerates harsh ecological damage. The area under dry land rice cultivation has increased from 15.1 thousand hectares in 1988 to about 24.0 thousand hectares in 1993. Production has increased from 27.5 thousand tons to about 35.9 thousand tons over the same period. However, productivity has declined over 18% within this period to an estimated 1,497 kilos per hectare.

"Bolanha Doce", or fresh water rice, is produced mainly on alluvial soil of rivers beds and flood plains, especially the Geba River Basin. It is also produced in the humid valleys of the interior. Fresh water rice is cultivated mostly by commercial farmers during the rainy season. These areas are normally on low lands. Water control and management in this system are not major constraints. The area under cultivation has gone from 19.4 thousand hectares in 1988 to 30.4 thousand hectares in 1993. Production has increased from 41.1 thousand tons to 60.2 thousand tons over the same period. Productivity has fallen about 7% to a little less then 2,000 kilos per hectare. One cause of the decline in productivity per hectare since 1990 has been the discontinuance of the use of improved seed varieties and fertilizers. Seeds and fertilizers had been made available to small farmers through an "in kind" credit program operated by DEPA. With the ending of the program and credit services, small farmers reverted to using seeds they produced, which as time passed, became weakened by cross-breeding with local varieties.

1.2 Processing (Husking)

Husking is done manually primarily by women. There are currently no operational rice mills in the major producing areas in the country . A large rice mill with a capacity of more than 20 thousand tons per year was installed in Bissau but has been closed since the late 1970's.

In 1984, 35 husking machines were installed in the south of the country, partly financed by the Church Eucumenic Council, the Quaker Service and Oxfam Belgium. The machines had a total husking capacity of 10 thousand tons of rice per year. Some of these machines still operate but most are idle due to the lack of spare parts. There is another rice mill in Bafata which has a capacity of more than 20 thousand tons per year.

1.3 Marketing

a) Domestic

Farmers have historically bartered rice for goods. The majority of production has been designated for the national consumer market. The trade has been concentrated in urban areas with storage facilities. Rice shipped to Bissau from the south was husked in Bissau and sold to the local urban consumer.

Domestic prices (minimum prices) at the producer levels were fixed jointly by the Ministry of Commerce and Industry and the Ministry of Rural Development and Agriculture (MRDA).

b) International

Guinea-Bissau has imported rice since 1960. (The first recorded information shows rice imports at 3,400 tons for 1960-64 and 20,810 tons for 1970-74.) These imports have grown from 41.0 thousand tons in 1986 to an estimated 75.7 thousand tons in 1993, an average annual increase of 10.8%.

1.4 Commerce

Nationally produced rice has been traded among individual producers rather than groups. There were not any organized trade agents to carry out these activities.

Rice has been the main item in barter trading especially for the cashew nut trade. Rice in this role has added liquidity to the rural economy. Rice has itself served as a liquid asset equal to the national money or, in some cases, preferable to it.

1.5 Services

In the past, rice was shipped by boats to Bissau for marketing. The government did provide some services, for example, pest control in the rice fields. From 1974, the Ministry of Agriculture had agricultural representatives in several zones of the country to aid in providing services to farmers, including improved seeds and fertilizers. After 1990, these services were no longer available.

2. CURRENT

2.1 Production

Rice production for 1994 is estimated at 126.6 thousand tons. This is an increase of 0.5% over 1993 and 1.3% over 1986. There is a slight increase estimated for the total area of rice cultivation. Practically every rural household grows some rice for their own consumption and a majority have excess for commercial trade or sale.

2.2 Processing (Husking)

Milling resources for rice are more than adequate for marketing current and anticipated domestic production. The operating rice milling capacity of the industry includes approximately 35 very small village-level mills in the two southern regions of the country; a new privately owned, intermediate-sized mill at Bafata; and a publicly owned, 53 year old industrial-sized mill in Bissau. Together, the 35 small mills have the capability of processing about 10 thousand tons of paddy per year. The other two mills could annually process more than 20 thousand tons. Since sales of paddy into the rice marketing channel have not amounted to more than 10 thousand tons in recent years, the existing capacity exceeds processing needs.

2.3 Marketing

a) Domestic

In Guinea-Bissau, rice is consumed by nearly everyone. In 1992, 121 thousand tons of rice was consumed. Rice is imported to be partially used to trade for cashew and can represent 80% of the value of cashews sold nationally. Presently, at the producer level, an important group of traders buy the paddy rice and milled rice. The rice is stored and then sold to wholesalers. They, in turn, mill the rice and sell it to retailers who sell it to the consumers. Only 10 thousand tons of the 123 thousand tons of paddy rice produced was sold into the commercial market.

b) International

Guinea-Bissau imports most of its rice from China, Thailand, and Pakistan. The imported rice is usually of low quality.

In 1992, 75.7 thousand tons of rice was imported. There is an import tax of 15% on rice. While there is no tax on domestic rice, the import tax raises the price on all rice thereby helping the local producers.

There is an active informal cross border trade in rice estimated at 13 thousand tons and valued at $3.3 million for the 1990/1991 agricultural year. 218 tons of rice were re-imported during the same period.

2.4 Commerce

The least efficient component of the entire rice marketing system is the assembly stage of traditionally grown rice. In the area around Catio, assembly merchants purchase small quantities of rice from numerous small-scale producers and thus "assemble" the grain into lots that can be more efficiently handled. Because of the small scale of their operations, these merchants require high gross margins estimated at approximately 35%.

2.5 Services

The major deficiency of the system is the lack of operating capital to purchase rice offered by the producers. The distribution of available credit flows primarily through a very limited number (less than four) individual wholesale merchants.

Storage facilities and milling services can be rented. The grain storage resources of the system are somewhat inadequately distributed. The small, village-level mills, as well as the rice mill at Bafata, do not have adequate storage capacities to store the quantity of grain that would insure that the mills operate at capacity throughout the year.

Transportation resources, which also can be rented, are more than adequate for marketing current and anticipated domestic production.

3. POTENTIAL

3.1 Production

The potential for rice production depends on several factors: land, labor, and capital.

There are ample unused areas of salt water flats as well as humid valleys, rivers beds, and flood plains for "bolanha" rice expansion. There are also abundant areas available for dry land rice. The difference between dry land rice and "bolanha" rice (both salt and fresh water), is that dry land rice is not a permanent crop but an itinerant slash and burn activity that is the cause of serious ecological damage.

The overall national average of a rice producing area is about 0.6 hectares. Given present technology and capital this can not easily be changed. This means that growth of the area under production will be mostly a function of population growth.

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The amount of labor that is designated to rice is a function of the relative returns on labor compared to returns on other options available for that labor. Presently, it takes an estimated 90 days of labor to produce 2,000 kilos of rice on a hectare. The value of that rice for the producer is estimated at $214 or $107 per ton times 2 tons. This calculates to roughly $2.38 per day of labor. Other activities such as harvesting cashew nuts have a higher value per day of work. It takes about 50 days of labor to harvest 1,000 kilos of cashew from about 1 hectare. The value of the nuts to the producer is presently $310 per ton. This gives a return of $ 6.20 per day, 161% higher return than rice.

It has been shown in several projects that production can be increased from current average levels of less than 2 tons to 4 or more tons per hectare in "bolanha salgada" and "bolanha doce" cultivation through use of improved seeds. The increase could be even greater if fertilizer were applied.

3.2 Processing

Milling resources for rice are more than adequate for marketing current and anticipated domestic production. A possible exception is in the Tombali region.

3.3 Marketing

a) Domestic

The government should implement policies that enhance the competition level within the assembly stage of the rice marketing system. This could be done by adopting policies which serve to attract private firms to enter this activity. Such policy changes might include those which create an improved environment for credit institutions which could offer credit to merchants capable of pledging the required collateral.

Increased marketing efficiency could be enhanced by policies that allow the development of alternative marketing methods. This implies that government should not impose marketing patterns such as the regulation requiring millers to buy from assembly merchants.

b) International

Given adequate financial resources and a liberalized internal policy environment, the domestic rice marketing system can compete with imported rice. Under these circumstances, protection from imported rice, in the form of importation fees or tariffs, is not needed for domestic rice to compete successfully with imported rice.

There is a large and active informal cross border trade in rice. This trade is both profitable and has growth potential. Rice exports to the neighboring countries could become one of Guinea-Bissau's major export earning activities with gross values at several million dollars per year. The elimination of legal and regulatory barriers to rice imports and rice re-exports would facilitate this growth.

3.4 Commerce

As the cashew trade grows, less rice will be grown and there will be an increase in the demand for rice for food.

3.5 Services

A credit system for operating capital to purchase available supplies of rice offered by producers by the assembly merchants would enhance the efficiency of the assembly process and lower cost. This would translate into high producer prices (given that the local consumer price is a function of the imported price of rice).

4. CONSTRAINTS

TC - 1 POLICY

4.3.1 Marketing

a) Domestic

Government policy of administrative controls and limitations of volumes of rice imports is a constraint for rice marketing.

The Government import tax on rice restricts consumption and lowers disposable income, especially for lower income people.

b) International

One constraint on international marketing, is the Government restrictions on cross border trade.

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An additional constraint is the lack of a "draw-back" facility by which re-exported rice would receive back the value paid on import taxes.

Government allowing of (dumping) imported donated grains (wheat) for humanitarian purposes lowers the demand of domestic production of grains and lowers the price to all national producers.

TC - 2 LEGAL AND REGULATORY ENVIRONMENT

4.3.2 Marketing

a) Domestic Marketing

Tolls collected by Local Administrations raise marketing costs. Tolls were established by Government Decree Nr. 9, of 1/25/43 and subsequently readapted by Decree Nr. 1.656, of 8/8/64 to tax coconut, palm oil, groundnut, honey, beeswax, leather, wood and rice. These tolls are only applicable to the movement of goods in and out and cannot be gathered in the administrative areas where they transit. Although it is said that those tolls are not collected anymore, the truth is that they were not formally abolished.

b) International Marketing

The current system of taxing exports of traditional products is contradictory, uncertain, and inaccurate. Government Decree Nr. 08, of 5/4/87 which regulates this matter, establishes that all export duties on commercial products are abolished (art. 1), but establishes, at the same time, that exports of traditional products are taxable, if international price levels permit substantial gains from the exportation of that product (art. 3).

It is obvious that export duties were not abolished. The problem is that there is a total "arbitrariness" of Government decision concerning taxation; the products under taxation and the amount of taxation.

Considering the current practices of re-exportation of rice, it will be advantageous to approve these activities, and establish, at the same time, the drawback against taxes paid.

4.5.2 Services

The high cost of commercial deeds and documents constitutes a constraint to the formalization of contracts, such as loan contracts for financing commercial activity or transport. Likewise, this can also be found in the registration of agreements, particularly the registration of collateral, such as mortgages, required by banks for granting of loans. These agreements constitute security for the parties. Unless formalized, there is an increase in the risk for commercial transactions, while formalization lowers the risks but increases the transaction costs.

TC - 3 JUDICIAL AND ADMINISTRATIVE ADJUDICATION

4.4.3 Commerce

The celebration of notarized contracts, i.e., in the presence of the Notary, constitutes additional security for the illiterate citizen. It is also the only proper way to enter into written agreements, for often the law only considers the written document as evidence. The existence of only one Public Notary Office, in Bissau, limits recourse to the Notary for celebration of agreements (i.e. including contracts of societies, i.e. constitution of commercial societies). In case of conflict and judicial claim, the absence of a written agreement can constitute a difficult problem of evidence both for the parties and Courts.

Another significant constraint to the development of business is high legal costs, generally, exacerbated by the deficient functioning of Courts, which is reflected in the backlog of cases and low confidence in the Courts.

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Another significant constraint to the development of business is high legal costs, generally, exacerbated by the deficient functioning of Courts, which is reflected the backlog of cases and low confidence in the Courts.

Yet another serious constraint is the absence of and knowledge about recourse at the Public Administration level for acts committed by public officials. Within the Judicial Branch there is a complete absence of courts which can hear cases regarding the decisions or acts of the Public

Administration. The Tribunal de Contas could fulfill this role if its scope were broadened and its capacity were strengthened.

TC-4 PRIVATE SECTOR

4.1.4 Production

Rice production is limited primarily because of competition for labor. The returns to labor for other activities such as cashew and mango production is much higher than it is for rice. Despite expanding areas of rice production, a constraint on increasing overall production has been the drop in production per hectare due to lack of improved variety of seeds and fertilizers.

4.2.4 Processing

High cost of processing is due to the economics of scale. This, in turn, is caused by lack of credit availability so that assemblers and millers can acquire and hold larger stocks. This would lower their costs of operation and processing.

There is also a lack of rice processing machines in the major rice producing areas in the country.

4.4.4 Commerce

Rice is first a subsistence activity for farmers, and then a means of exchange. As the country grows economically, the use of rice as a liquid asset is being replaced by currencies. The government restriction of trade both in importation and re-exportation has forced the rice market to go underground (informal). This has increased costs, lowered efficiencies of scale, and made merchants subject to forced illegal payments to public officials. Cross border exportation of rice, at more than $3.4 million, is Guinea-Bissau's second most important export after cashew. This activity should be formalized and its full value captured into the official monetary system. Also, this trade should be encouraged as a major earner of formal exchange and a producer of additional national wealth.

4.5.4 Services

The absence of credit for working capital for assemblers and millers so that they can buy and hold more efficient volumes for stocking and processing is a constraint.

1. RICE	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons	125,000	141,942	88,383	105,859	118,834	123,564	123,612	119,657	126,574				127,000
Processing														
primary	tons	81,250	92,262	57,449	68,808	77,242	80,317	80,348	77,777	82,273				82,550
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons	117,373	122,262	85,449	97,505	109,510	127,665	143,286	130,047	124,017				125,000
informal	tons													
exports														
formal	tons							0						100,000
informal	tons	5,000	8,000	9,000	10,000	11,000	12,000	13,000	14,000	15,000				
imports														
formal	tons	41,123	38,000	37,000	38,697	43,268	59,348	73,720	66,270					142,450
informal	tons							218						
PRICE														
producer	US$/t	101	89	77	94	42	109	94	107	104				100
domestic														
national	US$/t	217	329	326	361	300	324	290	368	104				300
imported	US$/t	217	329	326	361	300	324	343	436	430				
exports														
formal	US$/t													320
informal	US$/t	271	411	407	451	375	405	290	460	130				
imports														
formal	US$/t	181	274	272	301	250	270	286	260	280				270
informal	US$/t							290						
VALUE														
producer	US$m	12,648	12,696	6,770	9,920	5,031	13,438	11,620	12,788	13,164				12,713
domestic														
formal	US$m	25,451	40,215	27,850	35,160	32,866	41,379	41,553	47,857	12,898				37,500
informal	US$m													
exports														
formal	US$m													32,000
informal	US$m	1,355	3,289	3,667	4,508	4,127	4,862	3,270	6,440	1,950				
imports														
formal	US$m	7,431	10,416	10,049	11,638	10,821	16,110	21,650	10,821	10,821				38,462
informal	US$m							55						

1. RICE					
		Overall Economic Score			
Supporting Commerce					7
	General	0	5		
	Specific	0	6		7
Supporting Services					
	General	3	4		6
	Specific	0	3		8

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

0 to 2 little or no support
3 to 4 some support
5 medium support
6 to 7 good support
8 to 10 excellent support

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II. CASHEW

I. HISTORY

Cashew nuts have been Guinea-Bissau's most important agricultural product since independence both in terms of new production and increased exports. Cashew production traditionally has been concentrated in the northwest, but plantings have become widespread throughout the country. This has been partially encouraged by the reduction in the export tax on raw cashew nuts from 47% to 20%.

1.1. Production

Cashew raw nut production has grown at a compounded yearly average rate of 21.8%, or from an estimated three-year average in 1983-85 of 6,233 tons to a three-year average in 1991-93 of 30,160 tons (see Table 1). Production for 1993 was estimated at 32 thousand tons. The total value to the producers over the same period has grown from an estimated $1.2 million to $5.8 million over the last three years. That is an increase of close to 5 times. Producers' income for 1993 was estimated to be almost double this or $ 9.3 million. The area occupied by cashew has grown at an estimated 15.5% yearly average rate since 1983, that is, from approximately 8 thousand hectares in 1983 to over 25 thousand hectares in 1992. This represents about 7% of the total area under cultivation in the country and around 2% of the total arable area.

1.2 Processing

Guinea-Bissau does not produce shelled cashew kernels for exportation nor does it have any operating shelling industries. It also does not have any facilities for false fruit processing. A local trading group, "GETA/Bissau S.A.", has installed a highly mechanized shelling facility with a capacity of 2,000 tons per year (24 hours per day for 288 days per year), but it is still in the experimental phase. The Palestinian (PLO) ambassador also has a mechanized shelling facility that is not yet operating.

A fruit processing plant, "Titina", in Bolama utilized cashew, but has been shut down for years. An agricultural association of the Co village ("tàbanca") in Bula sector, formed mainly by women, has a small fruit juice operation that processes small amounts of the cashew false fruit.

Table 1. **Cashew Raw Nut Production and Area**
GUINEA-BISSAU BASIC CASHEW DATA

Year	Area	Prodt./Producer		Prices	Value*	Exports	Prices	Value
	ha	kg/ha	tons	US$/ton	US$1,000	tons	US$/ton	US$1,000
1983	7,973	589	4,700	226	1,063	2,000	600	1,200
1984	8,939	671	6,000	167	999	8,000	605	4,840
1985	11,784	679	8,000	179	1,432	6,622	727	4,814
1986	14,629	478	7,000	189	1,323	5,995	860	5,156
1987	17,475	515	9,000	224	2,012	10,441	1,033	10,783
1988	20,320	492	10,000	288	2,884	9,918	851	8,444
1989	23,165	432	10,000	182	1,822	9,409	755	7,108
1990	23,832	816	19,450	203	3,954	16,410	708	11,611
1991	24,499	1,146	28,080	150	4,199	15,670	695	10,892
1992	25,166	1,198	30,160	145	4,362	3,650	825	3,010
1993*			32,240	291	9,397	21,200	752	15,940
1994*			34,320	308	10,560			

*estimates
Sources: Banco Central Guine-Bissau, um novo comeco; MDRA, Anuario Estatistico 1987,93/94

Throughout the country the majority of false fruit is home processed into wine by women. Some commercial farmers ("ponteiros") have distilleries and buy cashew false fruit, juice and/or wine to make a type of alcohol ("aguardente").

1.3 Marketing

a) Domestic

Up until 1993, the Ministry of Commerce and Industry, the MRDA, with the major businessmen and traders fixed the domestic price of cashew. They also set the price for rice which constitutes the major means of exchange for cashew nuts.

b) International

Cashew raw nut exports have gone from virtually nonexistent in the 1960's to become Guinea-Bissau's most important export. Cashew raw nut exports have grown at a compounded yearly average rate of 11.8% from a three-year average in 1983-85 of 5,542 tons to a three-year average in 1991-93 of 13,507 tons. The average value over the same

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period has gone from \$3.6 million to \$9.9 million, or at a 13.5% compounded yearly average. In 1993, exports reached an estimated 21.2 thousand tons and had a value of \$15.9 million.

The Government of Guinea-Bissau (GOGB) has set minimum prices for exportation as well as imposing export taxes. National legislation stipulates that only companies with volumes over 300 tons qualify for export licenses. Furthermore, they are required to make cash deposits as a guarantee of their export tax payments. The government has also imposed an additional tax on cashew nuts that are not exported within the same calendar year of production. This tax was imposed in 1992 and was the cause of a serious dispute between the government and exporters.

1.4 Commerce

The major foreign traders of Guinea-Bissau cashew nuts have been Nabisco, Sterling Merit Ltd. of London, Woodhouse Drake & Correy of Geneva, and some Indian buyers .

All of the raw cashew nuts exported from Guinea-Bissau have gone to India for processing. The trade is conducted through commercial banks using letters of credit. Rice is imported by the local traders to be exchanged for the nuts. The rice trade is also done through commercial banks and can have credit clauses of up to 180 days after delivery.

1.5 Services

The transportation infrastructure of Guinea-Bissau has been both adequate and a stimulus to the expansion of production. As roads were paved and transportation costs lowered, new areas have been developed for nut production.

Besides the services offered by private companies including clearing agents and some minimal technical assistance provided by rural development projects of the MDRA, there has been no significant services offered to the producers. Production management practices, such as spacing for plantings, have been done irregularly based on producers' own initiatives rather than from technical assistance .

The Government, through the MDRA, has been providing a fumigation service for the exporters.

2. CURRENT

2.1 Production

Production for 1994 is estimated at 34.3 thousand tons, a 6.5% increase over 1993 production. The area presently occupied by cashew is estimated at 28.6 thousand hectares. This is an increase of 1,700 hectares over the pervious year. Approximately 90% of Guinea-Bissau's cashew raw nut production comes from 37.0 thousand small traditional village producers, mainly in the regions of Gabu (18.7%), Oio (16.6%), Cacheu (17.0%), Bafata (15.0%), and Biombo (12.5%). Comparatively, the "ponteiros" produce approximately 10% of the present crop.

2.2 Processing

There are two pilot projects to test the economic and social viability of local shelling of cashew nuts. TIPS/USAID has a pilot project to train 100 people in decentralized shelling, cashew nut processing management, business administration, and marketing (see TIPS Work Plan TC 4, Output C, Sub-output 2). The production of the project is intended for the international market. Additionally, UNDP is supporting a small entrepreneur in cashew nut shelling. The production is aimed at the urban consumer markets of both Guinea-Bissau and its neighboring countries.

2.3 Marketing

a) Domestic

The harvesting and selling of cashew nuts is done primarily by women. Containers of nuts, weighing from 10 to 20 kgs, are carried on the women's heads to selling stations. The women, moreover, are the main processors of false fruit into wine, which is then mostly sold to the local (male) market. Women also handshell some of the production for local urban markets and home consumption.

As production has grown so has the entire commercial chain, from exporters to regional and local buyers.

This year, the government has not set a producer price for cashew (the result of a TIPS direct recommendation to the GOGB). The National Agricultural Producers Association (ANAG), on its own initiative, announced that the price of a kilo of cashew was equal to a kilo of rice. This price relationship has been widely accepted throughout the country as a minimum. The Ministry of Commerce and Industry and the Ministry of Finance are satisfied with the results in terms of apparently higher producer prices and a more efficient flow of product for exportation.

The cashew market is highly integrated with an efficient network which is well structured and covers the entire country. The major commercial buyers have branches, or delegations, throughout the country and buy directly from the producer or from other intermediaries such as small businessmen or independent agents (entrepot system).

b) International

Cashew nuts represent by far the most important source of export income for Guinea-Bissau. The relative importance ranges from a recent low of 47% in 1992 to an estimated 85% in 1993.

Exportation for 1994 is estimated to increase to between 25 and 30 thousand tons. 10 thousand tons have already been shipped and the total value of this year's exportation could be up to $20 million.

A small percent of the raw cashew nut is sold to neighboring countries; these same nuts are eventually exported from the Gambia. Cross border exports are done primarily in order to avoid the export tax; the volume of this trade is unknown.

2.4 Commerce

There has been an increase in the number of buyers, including independent agents. This has helped raise competition and consequently the producers' price. This year an increased volume of nuts was bought with currency as opposed to rice barter trading. This would seem to be an indication that producers have surpassed a certain food subsistence need level and are able to buy other consumer goods.

2.5 Services

The country has benefited from newly paved roads, for example, the roads between Bissau/Bambadinca/Buba and Bissau/Prabis/Biombo. The improved road system has no doubt decreased the transportation cost thereby raising producer prices. The region in the north has the best road system, and it is also the most important area of cashew cultivation.

The ports of Bolama, Catio, Sao Joao, Bedanda, Pecixe Island, and Sao Vicente play an important role in the transportation of part of the crop.

Price information is disseminated through both formal (radio) and informal (bus and truck drivers, businessmen, and other producers) channels.

TIPS/USAID supports a market information system (SIMA) produced by the National Chamber of Commerce (CCIA) and ANAG. This service provides prices of several products, including cashew nuts, in both local currency and the current rice exchange rate. The prices from the major commercial cities are published daily.

In recent years, the private sector has expanded its storage capability as production increases.

The Ministry of Agriculture currently provides technical assistance in the areas of insect and pest control and preventive infestation treatments by fumigation.

3. POTENTIAL

3.1 Production

Guinea-Bissau has tremendous opportunity to become an important world producer of cashew nuts. The country could be producing between 40 thousand and 50 thousand tons of raw cashew nuts by 1998. There is ample suitable land for expansion and the country could easily increase its area under cultivation by 10 thousand hectares by 1998. This would mean at least an additional 10 thousand tons in the future. Cashew trees grow well in poor soil and fertilizers and pesticides are not necessary. Present productivity is higher than in most other countries (over 1000 kilos per hectare as compared to 300 kilos per hectare in Brazil) and productivity is rising. Also, nationally, cashew has one of the highest returns on labor and is at least three times that of rice, approximately \$6 per day versus approximately \$2 per day; (rice is the country's most important crop, both in terms of area under cultivation and total volume).

3.2 Processing

Presently, exports of raw cashew nuts have a unit value of approximately \$700 per ton, while the market price for shelled cashew kernels is over \$5,000 per ton. Shelling of cashew nuts can be either an artisan activity or a highly mechanized industry. Guinea-Bissau has low labor costs, a large pool of under-utilized labor at the village level, and high cost per capital. Given these factors, decentralized home artisan shelling would seem to have a comparative advantage over highly mechanized industrial shelling and to make the most economic and social sense. It also has the advantage of increasing family income in one of the world's poorest countries; the World Bank estimates the national average income to be between $200 and $300 per person per year. Moreover, processing of cashew nuts can increase the value of exports and foreign earning by almost $10 million per year given present production, and even more so as national production increases. Guinea-Bissau's present estimated production is about 6% of the world's production. Processing cashew nuts in Guinea-Bissau will not increase the world supply of kernels but only change their origin from India, where Guinean nuts are presently shelled, to Guinea-Bissau, where they are produced.

It is estimated that there are presently over 36 thousand family units producing cashew nuts and that their average production is less than 800 kilos per family. Present average income from cashew nuts is less than $300 per year per family and approximately $9.3 million for the rural sector as a whole. Decentralized shelling can add an additional $3.2 million to the rural economy or an increase of about 35%. The added income potential per family from decentralized shelling cashew nuts can be up to $4 per day.

3.3 Marketing

a) Domestic

As the cashew economy increases, better organization of agricultural associations and of different agents involved in cashew marketing (farmers, assembly agents, exporters) can and will improve the entire marketing system.

b) International

The nuts of Guinea-Bissau are of good quality and are competitive in the international market. The country can both substitute India in the direct sale of its own cashew kernels and also increase its market share as production grows. It will be important that merchants and exporters be aware of market forces such as international prices, quality standards, and importers' requirements.

3.4 Commerce

As the size of the cashew nut crop grows there will be more competition for buying and those merchants that have the lowest cost, pay the highest producer price, and provide the best service will have an advantage.

3.5 Services

Since cashew nuts are not a perishable good, handling, transportation, and storage risks, while important, are less critical.

As more roads are repaired and paved, transportation costs will go down and increase the incentive for expanded production in both existing regions and new areas.

Moreover, as production increases, producers, dealers, exporters, and others will earn more income and there will be a greater opportunity for the private sector to provide increased services and support. There will also be increasing pressure on the government to provide better port facilities and improved rural extension services.

4. CONSTRAINTS

TC - 1 POLICY

4.1.1 Production

The export tax on cashew directly lowers the producer income and lowers the amount s/he is able to invest on new production. It is the single most restrictive policy for investment and development of this country and probably responsible for holding exportation to half of its potential. This policy also lowers the disposable income of the rural population with the consequential lowering of demand and economic activity.

4.2.1 Processing

The export tax based on value penalizes exportation of processed cashew kernels. Basically, the tax is not only on the raw nut but also on the labor, packing materials, and any other needs for exportation.

4.3.1 Marketing

The government fixing of minimum pricing on exportation has distorted the market and given the foreign importers a marketing advantage over local exporters.

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4.5.1 Services

There is no research or extension services provided by the government on cashew planting or management. This results in inefficiencies, higher costs, and lower production for the country.

TC - 2 LEGAL AND REGULATORY ENVIRONMENT

2.1.2 Production

The Rules concerning Land Tenure and Land Concession, approved by the Government Decree Nr. 43.894, of 9/6/61 (currently in force, with changes approved by the Government Decree Nr. 47.167, of 8/26/66), will govern land questions until approval of the Land Tenure Law. The Rules are poorly disseminated and not well known. Some studies show that the Law has been arbitrarily applied i.e., the concession of land beyond the limits approved by the law. There is general insecurity and confusion in the legal system about land tenure and use. This feeling was accentuated by the Government Decision of 8/12/92 (Fiscal and Disciplinary Rules on Land Tenure), which states in the prologue, that the Law 4/75, of 5/5 (the law that establishes that all land is propriety of State) replaces Decree Nr. 43.894, of 9/6/61 (Rules on Land Tenure and Land Concession). This Decision was designed to fill the gap in this area, while waiting for the approval of a new Land Tenure Law, but it is far from doing so.

2.3.2 Marketing

International

The current system of taxing exports of traditional products is contradictory, uncertain, and inaccurate. Government Decree 08, of 5/4/87, which regulates this matter, abolishes all export duties on exportable products (art. 1), but establishes, at the same time, that exports of traditional products are taxable, if international price levels permit substantial gains from the exportation of that product (art. 3). This is why cashew exports suffer an additional tax under this Decree. Cashews are subject to a 10% surtax if not exported in the year they were harvested. (Decree Nr. 63, of 12/30/92).

Another constraint is that cashews cannot be exported in lots below a certain minimum. The minimum is determined by the Minister of Commerce and Industry, (based on Decree 22, of 8/13/86) rather than by market realities. This restriction limits access of many potential exporters and promotes development of export monopolies.

2.5.2 Services

The high cost of commercial deeds and documents constitutes a constraint to the formalization of contracts, such as loan contracts for financing commercial activity or transport. Likewise, this can also be found in the registration of agreements, particularly the registration of collateral, such as mortgages, required by banks for granting of loans. These agreements constitute security for the parties. Unless formalized, there is an increase in the risk for commercial transactions, and transaction costs are therefore increased to lower the risk.

TC -3 JUDICIAL/ADMINISTRATIVE ADJUDICATION

3.4.3 Commerce

The celebration of notarized contracts, i.e., in the presence of the Notary, constitutes additional security for the illiterate citizen. It is also the only way to enter into written agreements, for often the law only considers the written document as evidence. The existence of a Public Notary Office, in Bissau, limits recourse to the Notary for celebration of agreements (i.e. including contracts of societies, i.e. constitution of commercial societies). In case of conflict and judicial claim, the absence of a written agreement can constitute a difficult problem of evidence both for the parties and Courts.

Another significant constraint to the development of business is high legal costs, generally, exacerbated by the deficient functioning of Courts, which is reflected in the backlog of cases and low confidence in the Courts.

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Another significant constraint to the development of business is high legal costs, generally, exacerbated by the deficient functioning of Courts, which is reflected by the backlog of cases and low confidence in the Courts.

Yet another serious constraint is the absence of and knowledge about recourse at the Public Administration level for acts committed by public officials. Within the Judicial Branch there is a complete absence of courts which could provide recourse to adjudicate decisions or acts of the Public Administration.

TC - 4 PRIVATE SECTOR

4.1.4 Production

The major constraint to investment and increased production is the low producer price caused by the government export tax.

4.2.4 Processing

It is not yet known what processing technology is best for Guinea-Bissau. There is a need for pilot projects to test both capital and labor intensive systems as well as centralized and decentralized systems.

4.3.4 Marketing

International

There are no exporters with experience in exportation of processed cashew kernels.

4.4.4 Commerce

Agricultural producer associations are still in their nascent stage of organization, and thus unable to successfully carry out any commercial activity.

4.5.4 Services

The absence of credit remains an important constraint to the development of the production and commercial sectors.

Training and technical assistance to businessmen and producers is needed to enhance private sector skills and capabilities.

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There is no research or extension services provided by either the government, private sector, or producer associations in cashew plantings and management, resulting in mismanagement, particularly in spacing and pruning, resulting in lower productivity, higher costs, and lower net returns to the producer.

2. CASHEW	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons	7,000	9,000	10,000	10,000	19,450	28,080	30,160	32,240	34,320				42,640
Processing														
primary	tons										50	200	600	2,000
secondary	tons													
final	tons													
Marketing:														
domestic														
in-shell														
formal	tons													2,000
informal	tons	400	500	600	700	800	900	1,000	1,100	1,200				
shelled														
formal	tons													
informal	tons													
exports														
in-shell														
formal	tons	5,995	10,400	10,500	9,414	16,409	18,250	3,650	21,200					31,640
informal	tons					2,000	3,000	5,000	7,000					1,000
shelled														
formal	tons										50	200	600	2,000
informal	tons													
PRICE														
producer	US$/t	190	220	290	180	200	150	140	290	310				450
domestic														
in-shell														
formal	US$/t													495
informal	US$/t	238	275	363	225	250	188	175	363	388				0
shelled														
formal	US$/t													4,000
informal	US$/t													0
exports														
in-shell														
formal	US$/t	860	1,033	851	755	708	695	825	752					700
informal	US$/t					275	206	193	399	426				545
shelled														
formal	US$/t						6,063	5,440	5,252	5,423				5,000
informal	US$/t													0

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VALUE													
producer			US$m	1,330	1,980	2,900	1,800	3,890	4,212	4,222	9,350	10,639	19,188
domestic													
	in-shell												
		formal	US$m										990
		informal	US$m	95	138	218	158	200	169	175	399		0
	shelled												
		formal	US$m										8,000
		informal	US$m										
	Total			95	138	218	158	200	169	175	399		8,990
exports													
	in-shell												
		formal	US$m	5,156	10,743	8,936	7,108	11,618	12,684	3,011	15,942		22,148
		informal	US$m					550	619	963	2,791		545
	shelled												
		formal	US$m										10,000
		informal	US$m										
	Total			5,156	10,743	8,936	7,108	12,168	13,303	3,974	18,734		32,693

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III. FRUITS

1. HISTORY

During colonial time and the period between 1974 and 1987 the development of fruit production, commerce, and services was very limited due to the lack of production technology, access to markets, and processing facilities.

1.1 Production

Traditionally, the bulk of fruit production, such as bananas, citrus, pineapples and mangoes, was mainly located in the South and in old orchards developed during colonial times in the eastern regions of Bafata and Gabu. By 1953, when fruit production was mainly a backyard activity, it was estimated that there were only 320 thousand banana trees, 221 thousand mango trees, and 112 thousand papaya trees in Guinea-Bissau. The estimated area for these fruits was about 3.8 thousand hectares.

1.2 Processing

There was some traditional fresh fruit processing into lemon juice and vinegar as well as cashew wines and liquors. Small scale drying of mango slices was also done. These processing methods were rudimentary and could handle only small quantities of fruit. Some industrial processing of jam and juice from mangoes and cashew fruits was done by Fábrica Titina Silá in Bolama. This agro-industry was in operation from the late 1970's to the early 1980's and had a yearly capacity of 1 million liters of juice and 250 tons of jam.

1.3 Marketing

a) Domestic

The domestic market was poorly supplied with fruit because of low production and difficulty accessing production sites resulting from poor road infrastructure. Some old colonial orchards were used to produce market fruit but on a very small scale. After independence, fruit beverages, juices, and jams from Titina Silá were produced, although not regularly, for all national markets. However, substantial quantities of fruit spoiled due to the difficulty in marketing and lack of processing facilities.

b) International

Fruit exports, to Europe in particular, were almost non-existent as the colonialists had not promoted commercial fruit production to the extent they had promoted peanut production for exports.

1.4 Commerce

Fruit commerce, as stated above, suffered from low production and difficult access to markets. The direct sale of bananas, mangoes, papayas, and citrus fruits in urban areas was mainly done by the orchard owners.

1.5 Services

As most of fruit production and marketing was conducted by orchard owners, support services were either very limited or non-existent.

2. CURRENT

2.1 Production

Beginning in 1987, production substantially increased as a growing number of "ponteiros" and small farmers planted mangoes, cashews, citrus, pineapple, and other fruit as a source of income. By 1992, the area under fruit production was estimated at about 15 thousand hectares and annual fruit production by "ponteiros" alone was estimated at over 3 thousand tons, especially citrus, mangoes, and bananas. In 1992, total mango production was estimated at 58 thousand tons, including 2.5 thousand tons of exportable varieties. From 1990, annual melon production, a very specialized agricultural practice, ranged from 200 to 400 tons.

Fruit production is now a widespread activity throughout the country. Bananas, citrus fruits, and pineapple are produced mainly in the South (Cacine and Bedanda) and in the Bafata Region (Bafata, Bambadinca and Xitole); papaya and grapefruit in Farim; and citrus and citrus products, such as lime vinegar, in Cacheu, Sedengal and Olossato. Mangoes and melons are presently produced in large scale in the areas surrounding Bissau, by "ponteiros", for exportation to Europe.

2.2 Processing

Fruit processing facilities are almost nonexistent. As a result, most of the fruit produced that is not absorbed by local markets nor consumed on the farm spoils, often unharvested. Juice and vinegar from limes, and wines and liquors made from cashew false fruit continue to be the predominant traditional fruit processing operations. There is also a small scale fruit preserve and juice industry in Co, Cacheu Region, although of limited capacity. Lack of knowledge of fruit processing restricts fruit marketing.

2.3 Marketing

a) Domestic

The production and sale of fruit is a good source of additional income to the small traditional farmers, the "ponteiros", as well as to merchants, including female merchants ("bideiras"). Domestic fruit marketing continues to rely heavily on these intermediaries who sell fruit directly to urban markets, Bissau being the principal fruit market. The intermediaries earn as much as 30 to 50% on the sale of fruit from local producers. Local producers of highly perishables, such as mangoes and bananas, sell most of their fruit at low farm gate prices to avoid risks inherent to transporting the fruit to Bissau. In addition to transportation problems, producers lack business contacts and are unfamiliar with urban markets and consumers' tastes and preferences. In the South, producer associations have been established to help reduce marketing risks for their members by promoting transport services, fruit production diversification, and assuring the minimum farm gate prices for their produce.

The retail price of mangoes is between $0.80 and $1.50 per kilo and a kilo of melon is about $0.80. The retail prices per kilo of bananas, papayas and pineapples are about $0.80, $1.50 and $2.00, respectively.

b) International

In 1991, fruit exports to the neighboring countries, Senegal, the Gambia, and Guinea-Conakry, included 132.6 tons of mangoes, 871.9 tons of oranges and 186.6 tons of bananas. These exports are made by merchants who transport fruit to urban, regional and export markets as a response to better prices. They also import fruit, including mangoes, avocados, pineapples, and mandarins from neighboring countries, either taking advantage of seasonal fluctuations or irregularities in fruit supply, or unmet domestic urban market demands of particular fruits. Merchants from Senegal and Guinea-Conakry sometimes buy fruit directly from Guinea-Bissau production sites by the truckload.

Mango exports to Europe in 1991 were 250 tons, mostly brought from Guinea-Conakry. In 1993, fruit exports to Europe included mangoes, melons, and papayas. Mango exports increased from 18 tons in 1993 to 36 tons in 1994. There were about 200 tons of melons exported in 1993. Most of this fruit was exported to Portugal.

2.4 Commerce

The fruit marketing system in Guinea-Bissau is a Multivalent System where producers and small merchants, licensed and unlicensed, are the principal players in the distribution of fruits from production sites to markets in response to market demands. However, this system has not developed mature support systems such as transportation, storage, and credits. The fruit marketing system has not developed all of these services due to its high risk nature and its yet small size.

Currently, fruit commercialization has substantially increased. Easier access to the South allows merchants to buy fruit from there and sell to other domestic markets. In addition to a few fruit stands and trucks that sell fruits, the intermediaries and "bideiras" continue to be the principal fruit sellers. However, fruit commerce is hindered by the unpredictability of wholesale fruit supplies. Fruit wholesalers are often unable to provide domestic hotels and urban enterprises or foreign buyers with a timely supply of fruit. Quantity, quality, and variety are additional supply problems.

2.5 Services

Fruit commercialization has increased as a result of increased production due to improvements in production technology services and transport and road infrastructures. Services, such as fruit collection, packaging and export promotion to support fruit commercialization are either nonexistent or still in their nascent stage of development. As a result, the commercialization of highly perishable fruit, such as mangoes, although highly profitable, presents potential risks for small farmers and fruit exporters. Cold storage is available and currently underutilized at the Guipal plant in the Bulola area just 0.5 km from Bissau's port entrance. Diesel generators are installed at the plant for the frequent city power outages.

Services providing grafts for mangoes and citrus are available from state orchards ("granjas") and some private commercial farms. Grafting techniques and identification of exportable mango varieties for increased production and exports have been recently promoted through TIPS financed technical assistance.

3. POTENTIAL

3.1 Production

Guinea-Bissau's climate and soil conditions are favorable to most fruit production. Land is available, particularly uplands, that is suitable for production of most fruit. There is an estimated 414 thousand trees of local mango varieties. The production capacity of these trees is about 16.6 thousand tons per year. More importantly, in the long run, is that many of these trees can be converted into producing exportable varieties. This could be especially important for small farmers as a major income source.

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There are other fruits that are or can be produced in Guinea-Bissau for the export markets. These fruits include pineapples, papayas, bananas, and melons.

3.2 Processing

There is potential for processing fruit as production grows and as the supply of non-marketable fresh fruit gets larger. Also, there is ample room to improve the traditional processing and transformation systems. Improvements could lower costs, raise producers' incomes, and lower consumer prices.

3.3 Marketing

a) Domestic

Availability of storage facilities for fruit preservation would reduce the spoilage risk for highly perishable fruit and extend the periods of fruit commercialization since domestic fruit marketing is mostly seasonal and of short duration. Although domestic markets present low consumption capacity for some expensive fruit, such as pineapples and papayas, their consumption could be increased with higher productions and lower prices.

b) International

It is estimated that there are 124 thousand trees of varieties that have or will have exportable mangoes. The potential exportable crop for 1997 is projected to be 1.8 thousand tons.

The existing stands of local varieties of mango trees that can be converted into exportable varieties offer an inexpensive opportunity to increase mango exports in a relatively short time. Other fruits whose large scale production could create opportunities for exportation to European markets are pineapple, papaya, and melons. There is a current demand in European markets for these fruits.

3.4 Commerce

Low cost due to high fruit quantities, especially certain mango varieties, pineapples, papayas and melons, in the markets would increase national fruit consumption.

3.5 Services

Better storage facilities would help prevent fruit spoilage and minimize the risk in fruit commercialization. Improved transportation services could increase fruit commercialization. Services to provide production know-how, fruit collection and packaging, market information (domestic and international) and credit would promote fruit production and exports.

4. CONSTRAINTS

TC - 1 POLICY

4.3.1 Marketing

The government restriction on cross border trade creates inefficiencies of scale, increased costs, and subjects the sellers to forced illegal payments to public officials. It also maintains the trade in the hands of small scale producers/merchants. Cross border trade is important and could increase greatly if the activity was legalized and simplified.

There is a need to simplify and lower the cost of formal exportation.

TC - 2 LEGAL AND REGULATORY ENVIRONMENT

4.1.2 Production

The rules concerning Land Tenure and Land Concession, approved by the Government Decree Nr. 43.894, of 9/6/61, (currently in force, including changes approved by the Government Decree Nr. 47.167, of 8/26/66) will govern land questions until approval of the Land Tenure Law. The Rules are poorly disseminated and not well known. Some studies show that the Law has been arbitrarily applied, i.e. the concession of land beyond the limits approved by the law. There is general insecurity and confusion in the legal system about land tenure and use. This feeling was accentuated by the Government Decision of 8/12/92 (Fiscal and Disciplinary Rules on Land Tenure), which states, in the prologue, that the Law 4/75, of 5/5 (the law that establishes that all land is propriety of State) replaces Decree Nr. 43.894, of 9/6/61 (Rules on Land Tenure and Land Concession). This Decision was designed to fill the gap in this area, while waiting approval of the new Land Tenure Law, but it is far from doing so.

4.3.2 Marketing

The current system of taxing exports of traditional products is contradictory, uncertain, and inaccurate. Government Decree Nr. 08, of 5/4/87 which regulates this matter, establishes that all export duties on commercial products are abolished (art. 1), but establishes, at the same time, that exports of traditional products are taxable, if international price levels permit substantial gains from the exportation of that product (art. 3).

The truth is that export duties were not abolished. What exists, is a total "arbitrariness" in Government decisions concerning taxation, the products to be under taxation and the amount of taxation.

4.5.2 Services

The high cost of commercial deeds and documents constitutes a constraint to the formalization of contracts, such as loan contracts for financing commercial activity or transport. Likewise, this can also be found in the registration of agreements, particularly the registration of collateral, such as mortgages, required by banks for granting of loans. These agreements constitute security for the parties. Unless formalized, there is an increase in the risk for commercial transactions, while formalization lowers the risks but increases the transaction costs.

TC - 3 JUDICIAL AND ADMINISTRATIVE ADJUDICATION

4.3.3 Marketing

Bureaucratic obstacles to exportations by road constitute the major constraint due, on one hand, to the centralization in Bissau of the Ministry of Commerce and Industry's responsibility for licensing, and, on the other hand, to the absence of coordination between different services that control the movement of people and goods through terrestrial borders. The results often are arbitrary and inconsistent decisions concerning controls (i.e. Ministry of Commerce and Industry, Customs, and Police).

4.4.3 Commerce

The celebration of notarized contracts, i.e., in the presence of the Notary, constitutes additional security for the illiterate citizen. It is also the only proper way to enter into written agreements, for often the law only considers the written document as evidence. The existence of only one Public Notary Office, in Bissau, limits recourse to the Notary for celebration of agreements (i.e. including contracts of societies, i.e. constitution of commercial societies). In case of conflict and judicial claim, the absence of a written agreement can constitute a difficult problem of evidence both for the parties and Courts.

4.5.3 Services

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TC - 4 PRIVATE SECTOR

4.1.4 Production

There is a low level of production management for the major export crops, specifically mangoes. More importantly, there is a lack of knowledge of the varieties of those mangoes that are exportable and the means by which they can be converted into commercial exportable products. The majority of the "improved" varieties of mangoes currently under cultivation, Kent, Keitt, and Palmer, are not the most marketable types on the European market.

Furthermore, there is a lack of knowledge of other specific fruits which are exportable, especially to the European market, such as papaya and melons. These other fruit production activities could take advantage of the production capacity of existing commercial fruit producers, small farmers, and women producer groups.

4.3.4 Marketing

There is a low level of business skills for both producer/sellers and merchants. This is especially true for specific export operation skills. There is also only a small number of people who are trained or experienced exporters of fruits.

4.5.4 Services

Services such as cleaning, selection, grading, packing, and storage need to be developed in order to promote the expansion of fruit export, especially for mangoes.

Transportation, either by sea or by air, is a major constraint for the exportation of fruits to Europe. There is currently only one flight per week from Bissau to Lisbon on Air Portugal (TAP). Space is both limited and expensive. "Regular" sea shipment is limited currently to two companies, Portline and Transinsular. The former provides service from Bissau's port to Lisbon on a monthly basis and the latter provides service to Rotterdam every 3 weeks.

3. FRUIT	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons							63,070						
Mangos	tons							58,070						
Bananas	tons					3,000	4,000	5,000						
citrus	tons													
pineapple	tons													
Processing														
primary	tons													
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons							1,342						
Mangos	tons							613						
Bananas	tons							240						
citrus	tons							489						
pineapple	tons													
informal	tons													
exports														
formal	tons													
Mangos	tons			19	38		85	19	19					
Bananas	tons													
citrus	tons													
pineapple	tons													
informal	tons													
imports														
formal	tons													
informal	tons													

PRICE										
producer	US$/t									
Mangos	US$/t							150		
Bananas	US$/t							206		
citrus	US$/t							178		
pineapple	US$/t									
domestic										
formal	US$/t									
Mangos	US$/t									
Bananas	US$/t									
citrus	US$/t									
pineapple	US$/t									
informal	US$/t									
exports										
formal										
Mangos	US$/t			1940	1780	2000	2000	2150	2720	
Bananas	US$/t									
citrus	US$/t									
pineapple	US$/t									
informal	US$/t									
imports										
formal	US$/t									
informal	US$/t									
VALUE										
producer	US$m									
Mangos	US$m							8,687		
Bananas	US$m									
citrus	US$m									
pineapple	US$m									
domestic										
formal	US$m									
Mangos	US$m							92		
Bananas	US$m							49		
citrus	US$m							87		
pineapple	US$m									
informal	US$m									
exports		0	0	0	0	0	0	0		0
formal										
Mangos	US$m			37	68	0	170	41	52	
Bananas	US$m									
citrus	US$m									
pineapple	US$m									
informal	US$m									
imports		0	0	0	0	0	0	0		0
formal	US$m									
informal	US$m									

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3. FRUIT

	Overall Economic Score		
Supporting Commerce			
General	0	5	7
Specific	0	6	7
Supporting Services			
General	3	4	6
Specific	0	3	8

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

- 0 to 2 little or no support
- 3 to 4 some support
- 5 medium support
- 6 to 7 good support
- 8 to 10 excellent support

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IV. VEGETABLES

1. HISTORY

Traditionally, Guinea-Bissau has not been a producer of vegetables, although there is a small but growing production sector. In general, the women of the Mancanha, Balanta, Fula and Mandinga ethnic groups have been the producers. Vegetables are grown during the dry and cooler seasons of the year, from mid October to the end of March. Mancanha women, who tend to dominate the urban production and marketing vegetable sector, gained their edge in the sector when they went to Senegal to avoid the fighting during the war.

1.1 Production

In the Green Belt Agricultural Sector, production has increased from 42 hectares in 1986 to 244 hectares in 1993 and production has gone from 229 tons to 7,744 tons over the same period. This has been an increase of 479% in area and a 3,287% increase in production (including such vegetables as lettuce, cabbage, carrots, peppers and tomatoes). Total vegetable production is substantially greater as a result of production by women's associations from the northern and eastern regions, as well as independent women producers who are not included in the Green Belt Project.

1.2 Processing

There were no processing facilities for vegetables in the country. There is some knowledge, among women, of conservation and/or transformation of some traditional vegetables, for example, hot peppers. Some agricultural extension projects of the MDRA have utilized appropriate technology for onion drying and processing tomatoes into paste.

1.3 Marketing

a) Domestic

As most of the vegetable production was practiced in small urban area plots, nearly all of the vegetable produce was sold in the urban markets. As production increased, the local urban markets could no longer consume the total production.

b) International

There has been informal export trade to the neighboring countries Senegal and Guinea-Conakry from local markets on the national borders. Also, various vegetables, such as cabbage and carrots, are imported from Senegal during the rainy season. Pepper is also imported in small quantities from

Guinea-Conakry. From 1990 to 1991, traditional rural farmers sold to Senegal and Guinea-Conakry 186 tons of pumpkin and smaller quantities of tomatoes and peppers.

1.4 Commerce

Commerce is almost exclusively dominated by "bideiras", who either sell their own production or buy from producers. The women wholesalers use buckets and bowls of unknown capacity as weighing measures. The produce is generally sold in small quantities (piles) at varied prices. Vegetables of wide consumption have been those vegetables used in cooking as seasonings, such as tomatoes, onions, peppers, and traditional vegetables, such as Hibiscus sabdariffa ("baguichi"), okra and garden eggs ("djagatu"). These vegetables are sold in urban and rural markets and are consumed on a regular basis by Guineans of all income levels.

1.5 Services

Private transportation and weekly river boats are the major means of transportation of production to the major consumer centers. Locally, ox or donkey carts are utilized to transport the product to village markets or to small informal roadside stands.

Traditionally, women had to provide themselves with most of the production inputs, such as hoes, buckets, and irrigation tools. Land was used for vegetable production after being used for cereal production, or intercropped with fruit trees.

2. CURRENT

2.1 Production

It is estimated that presently there are more than 15 thousand women producing vegetables on approximately 400 hectares, or an average of less than 30 square meters per producer. Tables 1 and 2 show vegetable production and areas under cultivation for the Green Belt Project of Bissau over an eight year period.

Table 1. Vegetable Production (Tons) 1986 -1994

Species	86/87	87/88	88/89	89/90	90/91	91/92	92/93	93/94
Lettuce	10.14	36.55	191.10	565.27	937.65	1749.37	2324.42	2528.78
Cabbage	3.94	37.20	52.64	141.37	189.09	110.55	166.86	193.25
Carrot	9.59	2.50	18.20	84.58	138.26	62.62	166.74	239.30
G. Pepper	7.05	5.17	83.25	184.55	86.86	105.96	180.94	205.73
Tomato	91.77	218.43	1420.32	1265.05	1308.49	1163.19	1493.70	1676.08
Others	106.16	360.19	816.48	1794.39	2060.83	1822.32	2596.71	2900.38
Total	**228.65**	**660.04**	**2581.99**	**4035.21**	**4721.18**	**5014.01**	**6929.37**	**7743.52**

(Source: Ministério do Desenvolvimento Rural e Agricultura; S.A.A.B. Projecto de Cintura Verde)

Table 2. Surface areas (ha) under Vegetables Cultivation 1986 -1994

Species	86/87	87/88	88/89	89/90	90/91	91/92	92/93	93/94
Lettuce	3.39	4.58	9.10	25.93	44.65	46.90	58.30	61.20
Cabbage	1.36	6.21	3.63	9.24	12.24	6.62	9.27	10.34
Carrot	1.37	0.25	0.91	3.88	7.09	2.62	5.73	7.81
G. Pepper	2.35	1.26	5.03	8.13	7.12	5.79	8.60	9.52
Tomato	13.11	24.27	40.35	60.41	36.55	32.15	38.30	41.02
Others	20.65	54.14	61.41	94.50	96.62	78.63	102.69	114.54
Total	**42.23**	**90.71**	**120.43**	**202.09**	**204.27**	**172.71**	**222.89**	**244.43**

(Source: Ministério do Desenvolvimento Rural e Agricultura; S.A.A.B. Projecto de Cintura Verde)

Vegetables are also produced in the rural zones of the eastern and northern regions of Guinea-Bissau. Area of vegetable production by "ponteiros" is only about 9 ha, which represents 0.12% of their total production area.

2.2 Processing

Processing facilities for vegetables are almost nonexistent or, if available, difficult to access. An agricultural association of the Co "tabanca", in the Bula sector, has a small canning factory for tomato paste production (in addition to fruit juice and jam processing). This facility, financed by the Dutch government, is not able to accommodate the local market for tomato processing.

2.3 Marketing

a) Domestic

The domestic market is growing as production increases. The international community, centered in Bissau, is a source of demand in addition to the changing eating habits of the local population. Prices are set by the market and can be very volatile, with sudden and high price increases due to irregular supply changes. Theses changes can occur as a result of irregular transportation services to the production sites, production seasonality, and to a lesser extent, the lack of developed marketing skills by producers and merchants.

Mancanha women, who continue to be the principal producers and marketing agents in the vegetable sector, train their relatives and other non-Mancanha women in production and marketing techniques, know market channels, and build up commercial links in order to assure production and supply of high quality vegetables. The major local vegetable markets are comprised of Bandim and the Central Markets in Bissau, and various rotating, non-daily markets ("lumos") in Mafanco in the east region, and Olossato and Bissora in the north. These "lumos" attract Mancanha women from Bissau.

Domestic markets have greatly expanded as women's groups in rural areas produce vegetables in large quantities and transport the production to the urban centers, mainly to Bissau markets. Lettuce, tomatoes, and cabbage are grown in the Bissau area, and to a lesser extent, the traditional vegetables "baguichi" and okra.

b) International

The cross border trade is growing as production increases. Pumpkins, tomatoes, and peppers are exported to the neighboring countries. The flowers of "Baguichi" (Hibiscus sabdariffa), grown on the northern borders, and of no national value, are often exported to Senegal for industrial processing into juice or beverages. Some scarce or not locally produced vegetables, including cabbage, kale, parsley, beets, carrots, green peppers, large okra, meat tomatoes and eggplants, are also imported from Senegal.

Green beans are the only vegetables formally exported to Europe. In 1993, approximately 14 tons of green beans were exported to Portugal.

2.4 Commerce

Mancanha women dominate the vegetable market, both buying and selling as retailers and wholesalers, and doing most of the cross border trade. Inherent profits are substantial due to high market prices. As a result, vegetable commerce is very intensive and market-oriented. In the month of January, when local vegetable production is at its peak, most of the highly perishable vegetables present potential spoilage risks due to the lack of storage or preservation facilities. The vegetable marketing system is predominately a multivalent system, similar to the fruit marketing system.

2.5 Services

The Ministry of Agriculture has supported the development of vegetable projects including the Green Belt Project in Bissau and the Swedish-funded P.D.R.I.-1 in Bula. Additionally, various NGOs, for example, RADI and ICAP in Farim, and the Quaker Service in the east support vegetable production. These projects provide training, increased accessibility to seeds, irrigation material, fertilizers, and pesticides.

Cold storage facilities are not widely accessible to vegetable producers and sellers.

Mancanha women and several women's associations provide informal credit, transportation, and marketing services.

3. POTENTIAL

3.1 Production

Guinea-Bissau has tremendous potential for vegetable production, both for domestic consumption and exports. There are both available land and favorable climate for vegetable production. Most importantly, there are the human resources, the women who have proven their abilities to produce and market vegetables efficiently. Improved production, through better technology, could increase the amount of vegetable exportation, as well as allow for year round production.

3.2 Processing

The potential for processing vegetables increases as production increases.

3.3 Marketing

a) Domestic

The domestic market will grow as production increases, prices fall, eating habits change, and vegetable consumption increases.

b) International.

Increased vegetable production will promote cross border trade and intensify vegetable commercialization. European markets offer opportunities for exports of green beans and other vegetable varieties not yet locally produced.

3.4 Commerce

With the involvement of newly-created women producers' associations in vegetable production and marketing and the improvement of road and transportation facilities, commerce will develop as consumption increases with lower prices.

3.5 Services

Several NGOs are committed to support rural communities involved in vegetable production.

4. CONSTRAINTS

TC - 1 POLICY

4.3.1 Marketing

The government restriction on cross border trade creates inefficiencies of scale, increased costs, and subjects the sellers to forced illegal payments to public officials. It also maintains the trade at the hands of small scale producers/merchants. Cross border trade is important and could increase greatly if the activity was legalized and simplified.

There is a need to simplify and lower the cost of formal exportation. Currently, there is a 5% export tax which is a significant constraint for formal vegetable exportation.

TC - 2 LEGAL AND REGULATORY ENVIRONMENT

4.1.2 Production

The rules concerning Land Tenure and Land Concession, approved by the Government Decree Nr. 43.894, of 9/6/61, (currently in force, including changes approved by the Government Decree Nr. 47.167, of 8/26/66) will govern land questions until approval of the Land Tenure Law. The Rules are

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poorly disseminated and not well known. Some studies show that the Law has been arbitrarily applied, i.e. the concession of land beyond the limits approved by the law. There is general insecurity and confusion in the legal system about land tenure and use. This feeling was accentuated by the Government Decision of 8/12/92 (Fiscal and Disciplinary Rules on Land Tenure), which states, in the prologue, that the Law 4/75, of 5/5 (the law that establishes that all land is propriety of State) replaces Decree Nr. 43.894, of 9/6/61 (Rules on Land Tenure and Land Concession). This Decision was designed to fill the gap in this area, while waiting approval of the new Land Tenure Law, but it is far from doing so.

TC - 3 JUDICIAL AND ADMINISTRATIVE ADJUDICATION

4.3.3 Marketing

Bureaucratic obstacles to exportations by road constitute the major constraint due, on one hand, to the centralization in Bissau of the Ministry of Commerce and Industry's responsibility for licensing, and, on the other hand, to the absence of coordination between different services that control the movement of people and goods through terrestrial borders, that is often arbitrary and juxtaposed (i.e. Ministry of Commerce and Industry, Customs and Police).

TC - 4 PRIVATE SECTOR

4.3.4 Marketing

There is a low level of business skills for both producers/sellers and merchants. This is especially true for specific export operation skills. There is also only a small number of people who are trained or experienced exporters of vegetables.

4.5.4 Services

There is a low level of production management for the exportation of vegetables. Additionally, there is a lack of knowledge of specific vegetables which are exportable especially to the European market, such as green beans.

4. VEGETABLES	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	tons	229	660	2,582	4,035	4,721	5,014	6,929	7,744					127,000
Processing														
primary	tons													82,550
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons													125,000
informal	tons													
exports														
formal	tons													100,000
informal	tons													
imports														
formal	tons													142,450
informal	tons													
PRICE														
producer	US$/t	184	89	77	94	42	109	94	107					100
domestic														
formal	US$/t	217	329	326	361	300	324	290						300
informal	US$/t													
exports														
formal	US$/t													320
informal	US$/t	239	362	359	397	330	357	319						
imports														
formal	US$/t	181	274	272	301	250	270	273						270
informal	US$/t													
VALUE														
producer	US$m	42	59	198	378	200	545	651						12,713
domestic														
formal	US$m	0	0	0	0	0	0	0						37,500
informal	US$m													
exports														
formal	US$m													32,000
informal	US$m	0	0	0	0	0	0	0						
imports														
formal	US$m	0	0	0	11,638	10,821	16,110	21,650						38,462
informal	US$m													

4. VEGETABLES				
	Overall Economic Score			
Supporting Commerce				7
General	0	5		
Specific	0	6		7
Supporting Services				
General	3	4		6
Specific	0	3		8

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

0 to 2 little or no support

3 to 4 some support

5 medium support

6 to 7 good support

8 to 10 excellent support

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V. FORESTRY

1. HISTORY

Guinea-Bissau has valuable forest resources. The forest area covered about 2.5 million hectares (ha) in 1978, including approximately 1.0 million ha of savanna and 800 and 200 thousand ha of open and dense forests respectively. The remaining 500 thousand ha comprised areas occupied by mangroves, palm trees, and evergreen forests along rivers. However, there has been tremendous pressure on forest resources for agriculture, timber and fuel wood exploitation. As a result, by 1990 there was a substantial decrease in forest areas, corresponding to approximately a 30% decrease in dense forest and a 60% decrease open forest. The forest continues to be used by rural communities as an important source of medicinal plants, diverse fruits, honey, and fiber.

1.1 Production

The estimates of wood production showed an increase in timber cutting from 559 thousand cubic meters in 1986 to 2.0 million cubic meters in 1992. Domestic fuelwood consumption, in 1992, was about 1.5 million cubic meters.

In 1985, the annual production of timber was estimated at 50 thousand cubic meters. This timber exploitation mainly involved the most commercially valuable species which resulted in their over exploitation. It was recommended that the logging rate not exceed 14 to 16 thousand cubic meters per year in order to be sustainable. However, the current harvesting rate far exceeds this recommendation.

1.2 Processing

The number of private industries and lumber mills increased with economic liberalization in 1986. By 1992, there were twelve mills located throughout the country, processing 7.5 thousand cubic meters of sawed wood annually. Most of the mills use old equipment and obsolete technology.

Traditional uses of wood include charcoal production and the utilization of palm wood for house and canoe constructions and carvings.

1.3 Marketing

a) Domestic

Wood consumption was estimated at approximately 1.4 million cubic meters in 1992, including wood processed by the mills. Charcoal, fuelwood, and wood for house construction are the main uses of wood products by rural communities.

b) International

Most of the log and sawed wood is exported to Portugal, Germany, Italy, and Cape Verde. The volume of wood exported, including log and sawed wood, increased from 3.9 thousand tons in 1986 to 9.2 thousands in 1990. The average log export increase for the last five years is about 26.6%. The increase for sawed wood exports during the same period was about 19.6%.

In 1990, 215.1 tons of sawed wood was exported informally across the border to Senegal and the Gambia. 260 tons of charcoal and 2.0 tons of palm wood, mainly used for house construction, was exported to Senegal in the same year.

1.4. Commerce

The exploitation and commercialization of logs and sawed wood has been done by both state and private industries. These industries own adequate means of transportation to take their product to Bissau for export. Bissau's port has docking capabilities to accommodate ships. The quality of the wood is controlled by a national department. In 1991, an export tax for logs, paid to the Ministry of Commerce, was 20 % of the FOB value per cubic meter.

1.5. Services

Services, including transportation, are adequate. The majority of state industries benefit from international technical and financial support.

2. CURRENT

2.1 Production

Total wood production by the timber industry was approximately 2.2 million cubic meters in 1992. Fuelwood production was about 1.5 million cubic meters. In 1991, log and sawed wood production was only about 600 thousand cubic meters.

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2.2 Processing

There are twelve lumber mills in the country. Socotram, the State owned logging and processing company, controls three of these industries. The remaining mills are privately owned and managed. The national capacity of sawed wood is about 17 thousand cubic meters per year. The lumber mills operate with very old equipment and use obsolete technology.

2.3 Marketing

a)Domestic

There is high demand for lumber, which is used for house construction (palm wood) and furniture. In addition, charcoal and fuelwood are produced for the most part in rural areas and then sold on the urban market. The demand for charcoal is high, and subsequently, charcoal is intensively sold throughout the country. Wood prices are fixed by the State, through Socotram.

b) International

Licensed firms control most of the marketing channels for wood exports up to the point of transshipment. Although most of the exports go through Bissau's port, some wood is sold directly to the Senegalese and Gambians from the production sites. Socotram officially prohibits wood sales from production sites in order to meet its export quotas. Most of production site sales are made by small informal enterprises, particularly for furniture manufacturing and charcoal production.

The total volume of logs and sawed wood exported decreased by 5% from 1991 to 1992. The export price of logs decreased by 2%, whereas the price of sawed wood increased by approximately 9%.

2.4 Commerce

Tropical hardwoods and other timber is mostly produced and marketed through an Entrepot Marketing System. Private or State lumber enterprises survey forested areas often with the assistance of residents of the local communities. Concession rights from the MRDA are required before any trees are cut down. Most of the wood is exported through Bissau, although some of the wood is channeled into the local or regional market to meet local demand.

However, to a lesser extent, wood can be classified by the Multivalent Marketing System for informal enterprises or individual merchants. This partly explains the reason why wood is expensive in the domestic market. Wood derivatives or forest products, such as charcoal, by-products from wood shops, and honey, are marketed through the Multivalent System either locally or to neighboring countries. Charcoal is either marketed by the producer himself or sold to a charcoal assembler who is responsible for paying the transportation costs and forest clearance fees.

Unofficial and small-scale wood production does occur. Custom officials often play a role in this system, as wood obtained from these sources, is sold in Senegal or the Gambia. Custom officials also sell confiscated wood.

2.5 Services

Timber industries are able to adequately provide for transportation and storage services. Charcoal is usually transported to urban markets through private vehicles.

The MDRA is responsible for the control of timber cutting. Neither MDRA nor private industries are involved in reforestation activities.

3. POTENTIAL

3.1 Production

Increased production should be restricted since reforestation is not being done and most of the forests are overexploited.

3.2 Processing

The current lumber mills are old and obsolete. There is tremendous potential to process the exported wood, mostly logs, if the mills were equipped with new equipment and better technology. The carpentry sector offers opportunities to increase processed wood production and sales by increasing their operation, management and technological capacities. Value-added products increase income from exports and domestic marketing and reduce the deforestation rate.

3.3 Marketing

a) Domestic

There is a potential to improve domestic marketing of products from processing industries and small furniture producing wood shops.

b) International

Good export markets exist for forest products. The potential exists to increase value-added product exports to neighboring countries, as well as to European markets.

3.4 Commerce

Sale of finished wood products which have a higher unit value should be encouraged. Finished furniture could be exported to neighboring countries as well as produced to meet the local demand.

3.4 Services

Storage and transportation facilities can also be improved. Quality control of wood products can increase producer benefits from domestic marketing activities.

4. CONSTRAINTS

TC - 1 POLICY

4.1.1 Production

There is no national policy for the regulation of charcoal and fuel wood consumption and production.

The sustainable rate of harvesting needs to be determined in order to ensure that this natural resource is not depleted.

There is no national policy on the sustainable use of forests.

A national policy is needed on the ownership of forest natural resources, for example, creating national forests.

4.2.1 Processing

A policy should be developed which would provide incentives and/or disincentives for the exportation of logs, sawed wood, or finished products. This policy should include exportation on the international market, as well as cross-border trade.

4.3.1 Marketing

a) Domestic

A policy on the use of charcoal and firewood for commercial firms in Bissau is needed in order to conserve this natural resource. (This is not a suggestion for the restriction of family consumption or consumption outside the Bissau area.)

b) International

Incentives are needed for the exportation of finished products, and restrictions are needed for the exportation of the raw material.

Commerce

The commercial system has to be opened up to increase cross-border trade in finished products and restrict the trade of the raw material.

TC - 2 LEGAL AND REGULATORY ENVIRONMENT

4.1.2 Production

Information indicates that the tax levied on each cut tree is very low. Better use might be encouraged through legislative incentives and sanctions.

4.2.2 Processing

Log exports greatly exceed the exports of processed wood. There are no legislative incentives to encourage exportation of value-added wood products. Likewise, there are no taxes or other sanctions on log exports which might encourage local processing. The absence of a legislative framework for such incentives and disincentives could be viewed as a constraint to better revenues from this resource.

4.3.2 Marketing

International Market

Article 16 of the Forest Taxation Rules (Decree Nr. 27/1991, of 4/11) clearly establishes an export monopoly for holders of wood cutting concessions, thus denying access to the export market for potential exporters who do not cut the wood.

TC - 3 JUDICIAL AND ADMINISTRATIVE ADJUDICATION

4.1.3 Production

The inability of the MRDA to enforce the application of the Forest Law (Decree Nr. 04/A, of 10/29/91), particularly the procedures for cutting, clearing (including root extraction), and reforestation is a constraint.

TC - 4 PRIVATE SECTOR

4.2.4 Processing

The processing constraints are lack of skills to meet market demands particularly in the cross-border trade of finished products and other wood products. Also, there is a lack of equipment, capital, and skills for the processing of veneers of other finished products, such as door and window frames.

4.3.4 Marketing

International

Guinea-Bissau needs to open up the market to cross-border trade of finished wood products.

4.5.4 Services

Better technology is needed to produce products, such as furniture, for cross-border trade and for the international market.

5. FORESTRY	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
VOLUME														
Production	m3							2,200,000						
Processing														
primary	tons													
secondary	tons													
final	tons													
Marketing:														
domestic														
formal	tons													
primary														
secondary														
final														
informal														
fuelwood	m3							1,500,000						
charcoal	m3													
exports														
formal														
logs	tons	2,015	4,020	3,079	3,080	5,975	5,420	5,201						
sawed wood	tons	1,787	787	911	970	3,009	122	204						
others	tons	141	170	57	180	158	208	215						
informal														
wood	m3													
charcoal	m3													
imports														
formal	tons													
informal	tons													
PRICE														
producer	US$/t													
domestic														
formal	US$/t													
informal	US$/t													
exports														
formal														
logs	US$/t		333	250	172	216	214	210						
sawed wood	US$/t		200	238	299	306	410	343						
others	US$/t			5,263	1,111	1,266	962	465						
informal														
imports														
formal	US$/t													
informal	US$/t													

VALUE									
producer	US$m						0		
domestic									
formal	US$m								
informal	US$m								
exports									
formal									
logs	US$m	1,340	770	530	1,290	1,160	1,090		
sawed wood	US$m	157	217	290	920	50	70		
others	US$m		300	200	200	200	100		
informal									
imports									
formal	US$m								
informal	US$m								

5. FOREST	Overall Economic Score			
Supporting Commerce				7
General	0	5		
Specific	0	6		7
Supporting Services				
General	3	4		6
Specific	0	3		8

Definition:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

The scoring system is as follows:

- 0 to 2 little or no support
- 3 to 4 some support
- 5 medium support
- 6 to 7 good support
- 8 to 10 excellent support

VI. FISHERIES

I. HISTORY

Guinea-Bissau's fisheries resource is one of the richest of the West African coast. This is the result of a combination of factors, including the collision of cold and warm Atlantic waters off the southern Guinean coast, the effluence of nutrients from several large rivers into coastal waters, abundant wetland mangrove forests along the coast extending into associated inland estuarine waters 20 to 40 kms inland which have high biological productivity, and finally, an island group which extends the coastal shelf 60-70 miles seaward.

Fishing was not a traditional occupation for Guineans, but rather a part-time activity by persons whose main livelihood was farming. Senegalese, Guinea Conakrean and other African fishermen fished in Guinean waters and this did not change with independence. They continue to fish in Guinean waters, usually without licenses, delivering their catches to home ports abroad.

Post-independence Guinea-Bissau lacked the necessary funding and technical skills to engage in fishing in the industrial zone. Therefore, the government opted for a policy of allowing foreign fleets to fish the off-shore industrial fishing zone. License fees which provided revenues to the treasury became the main return for the country. Concurrently, efforts were made to develop domestic small scale fishing in the artesanal zone, usually with donor funding. In some cases, donor funding was a trade-off for waivers of license fees for industrial zone licenses for fishermen from the donor country. The Soviet-sponsored Estrela do Mar state owned joint venture was one such attempt which was to conduct both fishing and processing.

The Swedish assistance program pioneered development projects to assist local fishermen, mainly through cooperatives. Other donors including USAID, FAO and the EEC supported artesanal fishing projects. None of these prospered due to several factors, the main ones being that marketing and prices were controlled by the state. Low domestic prices coupled with higher prices in neighboring countries created incentives for fishermen to avoid local controls and sell catches to Senegalese fishermen who in turn took the catches to Senegal for sale.

Thus a pattern of foreign dominance of industrial zone fish production and, albeit to lessor extent, foreign participation in artesanal zone fishing was established and continues today. Guinea-Bissau's maritime law enforcement has been weak, enabling foreign fishermen to fish illegally in Guinea industrial and artesanal zones with small risk of being penalized.

1.1 Production

Guinea-Bissau has **two distinct fishing zones**, each with different licensing and production systems: (1) an **industrial zone**, i.e., that part of the 200 mile EEZ outside the territorial 12 mile limit; and (2) the **artesanal zone**, comprising rivers, estuaries, and all waters extending up to 12 miles beyond the Bijagos islands.

1.1.a Industrial Zone

Exploitation of industrial zone fishing stocks is done almost entirely by foreign fishing fleets. Consequently Guinea-Bissau's revenues from industrial zone fishing are almost totally from license sales, which in 1990 made up 43% of Guinea-Bissau's foreign exchange earnings. This declined to about 30% in 1993.

Estimates of annual industrial zone seafood catch levels during the 1980's ranged from 160,000 to 200,000 tons. However, catches declined to about 116,000 tons in 1990 and 46,000 tons in 1993. Until 1992, about 150-200 boats were involved in industrial zone fishing each year. Since then, the number of licensed boats has declined to about 100.

TABLE 1
INDUSTRIAL ZONE CATCHES
1990-1993
(in tons)

YEAR	1990	1991	1992	1993
Fish*	96,551	82,249	74,712	34,466
Crustaceans	4,686	4,512	8,296	4,437
Cephalopods	14,532	11,015	8,165	6,801
TOTAL	115,769	97,776	91,173	45,704

Source: Dept of Statistics, Ministry of Fisheries
*No breakdown is currently available concerning the amounts of pelagic and demersal species in the total.

TABLE 2
ESTIMATED GROSS SALES VALUE OF INDUSTRIAL ZONE CATCHES*
1990-1993
(in millions U.S. $)

YEAR	1990	1991	1992	1993
Fish	144.8	123.3	112.1	51.7
Crustaceans	21.1	20.3	37.3	19.9
Cephalopods	29.0	22.0	16.3	13.6
TOTAL	194.9	165.6	165.7	85.2

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*Note: Estimates are based on Table 1 tonnage at following prices: Fish, $1500 p/t, Crust. $4500 p/t, Cephalopods $2000 p/tn.

TABLE 3
LICENSE REVENUES
1987-1993
(in millions U.S. $)

Year	1987	1988	1989	1990	1991	1992	1993
License Revenue	6.0	5.6	5.7	22.86*	13.49	13.49	10.78

Source: Banco Central da Guinea-Bissau

*Note: The increase in license revenue in 1990 over previous years was due to the change in setting fees rather than an increase in the number of vessels licensed.

The statistics in the tables above show that, both the number of vessels fishing and catches in the industrial zone declined during 1990-1993.

1. 1. b Artesanal Zone

Guinea-Bissau's artesanal zone extends 12 miles beyond the outer perimeter of the Bijagos Islands, which is 40-60 miles from the mainland in some places. Although it is supposed to be reserved for local fishermen, numerous fishermen from Guinea Conakry, Senegal and, to lessor extent, Mali and other countries are also active in it. Except in a few areas, fishing by large vessels in this zone is risky or impossible due to uncharted sandbars and rock outcroppings.

The number of Guinean fishermen grew from about 3,000 during the early 1980s to over 8,000 by 1993. A census poll in 1993 showed that of the 8,218 fishermen polled, 65% or 5,341 considered fishing as their main occupation. At the time, 1,975 fishing pirogues were reported. Of those, 467 were motorized.

Until 1993, the Ministry of Fisheries' artesanal catch statistics reflected only those catches registered as landed in Guinea-Bissau, and uncertain estimates of informal sector and "illegal" catches by foreigners. In 1993, the Fisheries Ministry began a more systematized system of recording statistics on catches in the artesanal zone. Table 4 shows unofficial statistics provided by PESCARTE of (a) Total Estimated Catch from the Artesanal Zone, including the estimated and unreported catch of foreign fishermen operating in Guinean artesanal waters (Senegal, Guinea-Conakry, Ghana, etc); and (b) that part of the total catch officially landed in Guinea-Bissau. No statistics are available for category (c) involving subsistence fishing catches which enter the informal market.

TABLE 4
ARTESANAL ZONE CATCHES
(in tons)
1989-1993
(tonnage data provided by PESCARTE)

Catch Category	1989	1990	1991	1992	1993
(a) Total Estimated Catch, both legal & illegal fishing	10,000	(10,000)**	15,000	(15,000)**	47,500*
(b) commercial urban landings***	5,400	7,990	4,800	2,200	3,500
(c) subsistence	n/a	n/a	n/a	n/a	n/a
(d) Est. Value of total catch (a) in U.S. $ millions ****	10.0	10.0	15.0	15.0	47.5

* The much larger estimated catch for 1993 in Table 4 does not necessarily mean that foreign fishing activity increased that year.

** Data for 1990 and 1992 are not available; therefore, previous year's data was used for those years.

*** Declining statistics in this category does not necessarily mean that less artesanal zone fish were delivered to the Guinea-Bissau market. It probably means that the informal market took a larger and completely unreported share of the catch.

**** A price of US. $ 1000 per ton, rather than the European market prices used for industrial zone catches, has been used as the price for this catch as nearly all of it is either sold in neighboring countries or the domestic market where prices are much lower than in Europe.

1.2 Processing
Almost all of the processing, i.e., freezing and packing, of the industrial zone catch has been done aboard vessels and taken directly to foreign markets. However, some processing of artesanal zone and small scale industrial zone catches has been done locally. During the late 1970s and 1980s, several state/foreign joint venture companies such as Estrela do Mar (ex-USSR), GUIALAP (a Guinean/Algerian company, now inoperational), a cooperative at Cacheu, a Swedish-sponsored cooperative on Bubaque Island, and an Italian joint-venture (Pesca Artesanal de Bolama) were established. Although some of these firms

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still exist, none of them flourished due to various reasons, including controlled prices for sale in the domestic market, weak management, high energy costs, and inadequate supplies of fish landed in Bissau. In recent years, informal operators and fishermen's associations, principally in the southern part of the country, have started an industry of smoking and drying fish for informal internal and export markets.

No canning or other processing industries have been established.

1.3 Marketing
Guinean involvement in marketing of seafood has been confined to (1) the portion of the total catch which is landed in Guinean ports as reflected in Table 4 under "b. Commercial Urban Landings" (about 3,500 tons), (2) fish obtained by the government from foreign fleets (1035 tons in 1993), and (3) the unknown quantity from artesanal and subsistence fishing which enters the market (some estimates indicate this quantity has risen from 7 thousand in 1990 to 20 thousand in 1993).

a) Domestic
Guinean consumption of seafood has been low in the past, but is growing. A 1992 report, based on a F.A.O. study, indicated that per capita consumption of fish was about 7 kg. More recent estimates place per capita consumption at about 25 kg. Guineans classify fish into three categories: (1) Prime Quality--this category is mainly export and "hotel" quality; (2) Second Quality; and (3) Third Quality. Most fish entering the domestic market are "third quality" fish. Few Guineans can afford shrimp or the "first category" export quality fish.

b) International
Historically, international marketing of most of the industrial zone catch has been done by foreign fishing enterprises which take their catches to foreign sales points, such as Las Palmas, European, Russian, and Asian ports, without entering Guinea-Bissau. Export of the relatively small part of the overall catch which is landed in Guinea-Bissau, prior to 1990 was done mainly by several state joint-venture companies. In recent years they have been joined by several private, mainly joint-venture, firms.

The pattern is much the same for artesanal zone catches. An undetermined quantity is sold directly abroad by foreign and some local fishermen, completely bypassing Guinean markets, processing and official export channels. "Export quality" seafood reaching Bissau is done by a few local firms which have storage and processing facilities.

Data on this export trade is shown in Tables 5, 5(a) and 5(b).

TABLE 5
FORMAL SECTOR SEAFOOD EXPORTS*
(in tons)

	1989 Tons	1990 Tons	1991 Tons	1992 Tons	1993 Tons
Frozen Shrimp	280	450	360	110	20
Frozen Fish	400	1,020	1,890	30	830
Other	0	30	0	90	70
TOTAL	680	1,490	2,250	230	920

TABLE 5(a)
FORMAL SECTOR SEAFOOD EXPORTS*
(U.S. $ value in millions)

	1989 $millions	1990 $millions	1991 $millions	1992 $millions	1993 $millions
Frozen Shrimp	1.96	2.72	1.5	0.70	0.08
Frozen Fish	0.20	0.61	1.06	0.06	0.51
Other	0	0.01	0	0.09	0.11
TOTAL	2.16	3.34	2.56	0.85	0.70

TABLE 5(b)
PRICES RECEIVED FOR FORMAL SECTOR SEAFOOD EXPORTS*
(U.S. $ value per ton)

	1989	1990	1991	1992	1993
Frozen Shrimp	7000	6044	4166	6363	4000
Frozen Fish	500	598	561	2000	614
Other	0	333	0	1000	1571
Av. Price p/tn in $	3176	2242	1138	3696	760

* Source: Banco Central da Guinea-Bissau: Situação Economica e Financeira, 1° Semestre/94.

Comparison of the official export data in Table 5 with the total catch levels for 1993 shown in Table 1, shows that only 920 tons of a total catch of about 93,000 tons (industrial zone 45,704 tons plus artesanal zone 47,500 tons) from Guinean waters enters Guinea-Bissau's export market.

The relatively high prices received for shrimp exported from Bissau (Table 5(b)) compared with average prices for industrial zone shrimp ($4,500) is probably due to the fact that local fishermen with small boats catch shrimp in "pockets" in the south, unreachable by large trawlers, which have large size shrimp. Industrial trawlers work

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primarily in the "Pinga Pinga" area in the north which has large quantities of small shrimp. The relatively low prices received for fish may be due to the larger proportion of second, rather than prime category fish entering Guinea-Bissau's export market.

In addition to the formal exports reported above, some informal cross-border trade in fish developed and grown over the years.

1.4 Commerce
Until 1990, domestic prices were set by the government based on species and size. Price controls acted as disincentives for domestic commerce in seafood, as fishermen tended to sell their catches informally to foreign markets. Since 1990 and the removal of price controls, local commerce, both wholesale and retail, in seafood has been growing, but remains almost entirely in the hands of informal operators, called "bideiras" (most of whom are Muslim women). A few local firms also engage in buying seafood, using refrigerated trucks, from artesanal fishermen in Bissau and regional landing points. They in turn, sell local quality fish to bideiras for retail sale. The bideiras usually have no refrigeration facilities. Therefore, the quantities they buy from producers or wholesalers are limited to the amount they can sell in a day.

A more detailed description of the commerce in seafood is contained below in 2.4.

1.5 Services
Historically, services for fishing vessels in Guinea-Bissau have been non-existent or weak. A state firm, GUINAVE, provided repair services for vessels, but ceased overall operations and efforts to privatize it are underway, without much progress. The industrial fleets carry their own packing supplies aboard. Some supplying and refueling for industrial vessels has been provided in Bissau port. Services for small scale artesanal operators historically were provided by donor-financed projects, i.e., provision of equipment, fuel, and credit.

2. CURRENT

2.1 Production
The 1993 total registered catch from the industrial zone was 45,704 tons and an **estimated** 47,500 tons was captured in the artesanal zone, for a total of 93,204 tons. Guinean-owned or joint-venture boats registered catches of only 78 tons from industrial zone fishing. Most of the 3,500 tons of registered artesanal zone catches (Table 4 b. Commercial/Urban Landings) was presumably from local fishermen.

Annual shrimp catches average about 5,300 tons. Fisheries Ministry statistics show a slight decline in shrimp catches since 1990, with the exception of 1992 for which a high catch was registered. It should be noted, however, that representatives of the private fishing industry insist that 1990 and 1993 were better years than 1992. They also argue that historically shrimp catches run in cycles of 3 to 4 years and that to identify real trends it would be necessary to examine records for at least ten years. Unfortunately, such records do not exist for Guinea-Bissau. Most of the shrimp caught in Bissau EEZ waters in 1992 were small (sizes 6 and 7 and SRs), selling at U.S. $3,500 per ton (SRs, used for paste,

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sell for less). The predominance of catches of small shrimp seems to indicate that the resource is under pressure from over-fishing.

In 1993, Russia remained the leader in registered industrial zone catches with over 19,000 tons, most of which was pelagic species. The Peoples Republic of China was second with nearly 14,000 tons, followed by Italy (7,000 tons), Portugal (2,600 tons), Spain (1,800 tons), Morocco (1,066 tons), Sierra Leone (1,004 tons), Senegal (969 tons, not including artesanal zone catch), and Korea (849 tons). Portuguese, Italian and Spanish vessels concentrate principally on shrimp.

The principal Guinean fishing firms are PRAIA MAR, GUINE-PESCA, SOCIEDADE MISTA DE PESCA EXTRELA DO MAR, AND SOCIEDADE MISTA DE PESCA GUINEO-FRANCESA. These firms engage in fishing as well as buying and processing.

An unknown, but large, amount of the artesanal zone catch is caught by foreign fishermen and sold abroad. Reportedly, at times during the past year about 400 boats from Guinea Conakry were observed in Guinea-Bissau's southern waters and a large, but unknown, number of Senegalese boats currently fish in the artesanal zone. Local observers believe that a portion of Senegal's fish exports originate in Guinea-Bissau's waters. The principal reason for dominance of foreigners (Senegalese, Guineans from Conakry, Sierra Leoneans, and Malians) is that they have traditional technical skills and access to financial and technical resources not available to Guineans.

Guinean government and private sector observers believe that during the past year an increase in illegal fishing has occurred. They report an increase in unlicensed fishing in the industrial zone and, secondly, more frequent illegal incursions by industrial zone vessels into the artesanal zone.

2.2 Processing

Since 1990, new private firms including those named under 2.1. above (some are former state enterprises which have been privatized or partially privatized), have started operations.

Sopeixe, in Cacheu, which was originally financed as a cooperative by USAID and later the EEC, has cold storage facilities (5 °C), an ice-maker (5 tons a day), stores, and market space and delivers about 1-5 tons of fish, mostly catfish, to Bissau each week. The Bolola complex has an under-utilized freezing and storage capacity.

Some local fishing enterprises, mainly cooperatives and associations, smoke or dry fish which are then either sold into the domestic market or sold informally to neighboring countries.

2.3 Marketing

a) Domestic

If current estimates of a per capita consumption of seafood of about 25 kg per year are correct, then about 25 thousand tons of fish and other seafood are entering the domestic market each year. At $1000 per ton this would indicate that $25 million of seafood was consumed in Guinea Bissau during 1993 (At $500 per ton the value would be $12.5 million). These statistics are highly questionable, but contradicting data are not available. In any event, during the past four years a significant increase in seafood consumption has occurred. Only about 3,500 tons of this amount is officially recorded as landings in Guinea Bissau. Of the latter, 1035 tons in 1993 was fish which foreign fleets (Chinese--PRC) delivered to the Ministry of Fisheries which in turn, sold the fish to bideiras (Muslim women who specialize in fish sales). Most wholesale and all retail sales of seafood is done by bideiras.

Local commerce is mainly in "category three" fish, and some "category two". To the limited extent that "prime" quality fish enters Guinean commerce, it either is exported or sold to hotels and the international community. The purchasing power of most Guineans does not enable large scale local demand for prime quality fish or shrimp.

Price controls were removed in 1990. Prices fluctuate, depending upon the time of the year and supply. The retail price of prime quality fish, such as barracuda, ranges from GP 25,000 to 35,000 per kg, whereas that of second class fish ranges from GP20,000 to 25,000 and third quality is GP10,000 to 15,000 per kg. (GP 13,350 equals $1.00)

Prices to the producer are much lower than retail prices. Producer prices for prime fish run from GP10,000 to 15,000 kg. This is partly due to the fact that fish is a perishable product and producers do not have refrigeration facilities and they must sell their catches soon after reaching port or risk having it spoil.

Another reason for low producer prices is the Ministry of Fisheries' practice of selling fish at low rates into the wholesale market. These sales are of fish provided under agreement with China (PRC) that catches from part of its fleet will be delivered in return for waiver of license fees. In 1993, 1035 tons, or 4% of total local consumption, were sold by the Fisheries Ministry at the following wholesale prices:

-- First (prime) quality GP 8,000 kg (U.S. $0.66 or $660 p/ton)

-- Second quality GP 7,000 kg (U.S. $0.58)

-- Third quality GP 6,000 kg (U.S. $0.50)

The bideiras who buy fish at these prices sell the product to consumers at free market prices.

b) International

Virtually all of the industrial zone catch (about 46 thousand tons in 1993) is sold directly into foreign markets without being landed in Guinea Bissau. Official exports of seafood in 1993 amounted to 920 tons with a value of U.S. $700,000. These exports are conducted by about four local joint-venture firms. The product exported is that part of the artesanal catch which is brought to Guinean ports and which is of prime export quality. In addition, Guineans are increasingly engaged in exporting dried and smoked fish to neighboring countries. A USAID-sponsored study of informal cross border trade ("O Mercado

Fronteiriço e a Balançã Comercial da Guine-Bissau, Aug. 1993), reported informal exports of slightly more than 3 tons of fresh fish to Senegal and 60 tons of dried fish, with an estimated value of U.S. $400,000 during 1991/92. According to the report, about 75% of this dried fish went to Senegal and the rest to the Gambia. Unknown quantities of dried and smoked fish are also being sold by local fishermen to the Guinea Conakry market. This is usually accomplished by sales to Guinea Conakry fishermen who take these fish home with their own catches. Air shipment of fresh fish (which sell in Europe at three times the price of frozen fish) to Europe has been tried, but to date has not proven cost-effective.

Producer prices for shrimp sold internationally range from U.S. $ 3,500-6,500 per ton, depending upon species and size.

2.4 Commerce

An F.A.O. study in 1992 estimated that per capita consumption was 7 kg. However, a recent estimate by F.A.O. technicians estimated the amount to be 25 kg. If the latter were true, it would indicate that much of the total artesanal zone catch is entering the domestic market for consumption. Most of the wholesale commerce and all of retail sales of seafood is done by informal sector bideiras who offer their products from stalls in markets and peddle seafood on the streets and to offices of the international community.

Bideiras do not have refrigeration facilities. Therefore, they purchase from fishermen only the quantity they can sell in a day. The few firms with freezer capacity also buy some seafood. Some of them have small refrigerated trucks which visit regional ports to buy from fishermen. Their main interest is in Prime and second quality fish and shrimp which they can freeze and export; however, they do buy and transport to urban centers some category three fish which they sell to bideiras for retail sales. The firms with refrigeration facilities have advantages in seafood commerce. In periods when the supply is high, these firms buy quantities of fish at low prices, freeze them, and hold them until the market supply is low, then sell them at high prices.

The commercial system for Guinean sea products may be summarized as follows:

i. Sale abroad of industrial zone catches: This system is foreign-dominated by the export of "European market" seafood direct to foreign markets, bypassing completely the Guinean export system. Guinean benefits are confined to license revenues.

ii. Sale abroad of part of the artesanal zone catch: Although some Guinean fishermen participate in these sales abroad, most of it is done by foreign fishermen who deliver artesanal production of fresh, smoked and dried fish to markets in neighboring countries.

iii. Local firms purchase catches from artesanal fishermen and (1) process and export "European" quality product, (2) sell to hotels, and/or (3) sell fish to bideiras for retail sale.

iv. Bideiras purchase from producers and perform both wholesale and retail sales oriented toward local markets.

v. Domestic commerce in frozen fish off-loaded in Bissau by foreign industrial zone vessels under agreements with the GOGB (1035 tons in 1993). These fish are sold wholesale by the Ministry of Fisheries to bideiras at set prices. The bideiras sell them at market prices.

For a detailed description of these systems, see the market structure study sponsored by USAID ("Guinea-Bissau's Informal Economy and Its Contributions to Economic Growth", by E. L. Crowley, Dec. 1993).

2.5 Services

Currently, repair services for medium and large fishing vessels are not available in Bissau. Bissau does not have a "fishing" pier for exclusive use of fishing vessels (although one is planned). Consequently boats sometimes must wait for space to dock at the commercial pier. Storage capacity is available in Bissau where foreign and/or domestic fishing firms could store (and/or freeze and store) seafood awaiting export. Since 1990 some local buying/processing firms have begun activities and can offer freezing and packing services. However, most of the seafood landed in Guinea Bissau for the domestic market is sold fresh, dried or smoked. Therefore, current storage facilities are not fully utilized. Gasoline for outboard motors used by some pirogues is expensive (PG 9,500 or about U.S. $0.70 a liter). Industrial zone vessels have their own ice-making and packing facilities on board and, as indicated above, do not off-load catches in Bissau. Packing cartons, etc, are brought from home ports abroad.

Vessels can obtain fuel and minor repairs (there are two local radar repairmen). but most vessels obtain these services elsewhere. Port costs reportedly are higher than in Dakar and Banjul. Refueling services are adequate; however, boat captains are reluctant to visit the port for this service alone. The result is that they often buy fuel at sea from roving sales tankers or call at other ports where they can not only obtain fuel, but obtain other services and off-load catch for sale or re-shipment. Thus, most of industrial fleet vessels go to the Las Palmas, Dakar or even European ports for major servicing activities.

Artesanal zone fishermen rely principally on local services for repairs and supplies. Most nets and other supplies must be imported. Donor-financed projects for project-linked associations and cooperatives continue to provide some services, including credit, for local fishermen.

Sea transportation of frozen seafood exports from Bissau is irregular and more costly than from other regional ports. For this reason, many of the medium-size industrial vessels deliver their catches to Las Palmas for sale. Larger vessels freeze their catches and hold them aboard until they return to their home port or other sales destinations at the conclusion of their season in Guinean waters.

3. POTENTIAL

3.1 Production

Reports produced during the 1980s generally estimated that the annual industrial zone catch "potential" was between 200,000 and 280,000 tons, of which the catch in high value (foreign market) species, including shrimp, was between 150,000 and 170,000 tons annually. The value of such tonnage would be between $120 and $150 million. Although during the 1980s, catches may have been possible at those levels or higher, Fisheries Ministry statistics now show declining catches of industrial zone fish catches during the period 1990-1993. The catches of shrimp and cephalopods during this same period, while showing slight declines, held fairly steady. There are several possible explanations for the drop in registered catches, including:

- A decline in fish stock due to over-fishing.

- A reduction in the number of licensed vessels fishing in Guinean waters. (From about 160-180 in 1990 to 108 in 1993). Reportedly the number of vessels of the former Soviet fleet has dropped.

- The new system of higher license fees set in 1990 may have reduced the number of applications for licenses. However, the decline in the number of licensed vessels is not as sharp as the drop in catch tonnage.

- Some observers state that the decline in the number of licenses and reported catches has been accompanied by an increase in unlicensed vessels and unreported catches.

Current information suggests that the most important of the above explanations for the decline in tonnage of catches is the decline in fisheries stocks. That would contribute to the reduction in the number of vessels.

Fisheries Ministry statistics on shrimp catches, although showing a slight decline since 1990, indicate that shrimp stocks remain fairly steady. The statistics show 1992 as an exceptionally good year. The migratory nature of some local shrimp species offers a certain protection. Shrimp reproduce in the estuaries and mangrove coastal areas and migrate to the industrial zone as they mature. Except for the "brown" shrimp of the northern coastal waters, which according to private sector representatives, is being depleted due to Chinese (PRC) netting shrimp larvae while fishing for other fish, shrimp do not appear to be in a significant decline. Their breeding grounds remain largely undisturbed. Also the shrimp's relatively short life cycle, 15 to 18 months, indicates that much of the stock can be harvested or be lost anyway.

A TIPS fisheries consultant (who will return in November 1994 to continue work) has developed preliminary proposals, based on recent catch reports, that for the next year or two Guinea-Bissau should set an upper limit of 60,000 tons on the industrial zone catch and, within that overall limit, set quotas on certain species which are the object of targeted fishing. He also has made preliminary recommendations concerning how the Guinean fishing industry can be developed to increase its share of both industrial and artesanal zone catches. An essential corollary to these measures is improvement of surveillance and enforcement capacity.

Artesanal zone fish stocks do not appear to have diminished. However, no one seems to know whether the estimated 47,500 tons of seafood caught in 1993 is a sustainable level of harvest. Some observers are worried that increased fishing pressure, including that by industrial zone vessels' "pirate" fishing in the artesanal zone, will soon diminish that resource also.

A USAID-sponsored study ("Cacheu River Estuary Shrimp/Prawn and/or Oyster Resource Production Potential Assessment") estimates that for shrimp, annual resources in the coastal waters of the Cacheu River would permit a harvest of 1,000 to 1,200 tons a year, and in the estuarine waters of the Cacheu Rivers an additional 600-700 tons per year could be taken. These resources are not being exploited and cannot be exploited by current traditional artesanal fishing canoes and pirogues. Some of these resources are migratory, moving between the industrial area and breeding grounds in the mangrove zone, but most are lost as a consequence of their short life cycle.

Available information seems to indicate that industrial fisheries stocks are being over-fished, but have not collapsed. However, urgent actions should be taken to determine sustainable yields in both zones. With proper management and controls, better enforcement, and changes in licensing procedures, Guinea-Bissau's fishery can continue to produce high levels of seafood. It could become a much greater source of employment and generator of local income if policy changes were adopted to channel even 30% of the total annual catch, currently directly sold abroad, into Guinean market and export facilities. This would expand all sectors of the local fishing industry. Such a shift might be accomplished by providing preferences and incentives to the local fishing industry and to foreigners who invest in joint-ventures, including shore-based facilities.

3.2. Processing

Changes in licensing and control systems which would offer advantages/incentives for industrial and artesanal zone fishermen to land their catches in Guinean ports would lead to expansion of the local processing industry. To accommodate such a shift in industrial zone catches, much of this expansion would have to be financed by foreign capital. The lack of domestic liquidity and credit facilities currently precludes rapid expansion based on domestic financing. Even if the major part of artesanal zone catches were directed into local markets, the positive impact on local processors would be significant, particularly for those engaged in smoking and drying fish.

An expansion of local industry in smoking and drying fish for the domestic market and export to neighboring countries is already underway. However, licensing and enforcement measures similar to those applied to industrial zone fishing is required to achieve rapid expansion of these activities. The measures taken should be designed to attract Senegalese and Guinea Conakrean involvement with Guineans in local processing. These foreign operators have technical skills and greater experience which can be passed to Guineans.

3.3. Marketing

a) Domestic

As incomes rise and eating habits change greater demand for seafood will develop in Guinea-Bissau. Greater production channelled through Guinea-Bissau would lead to expansion and improvement of marketing systems. Inevitably, the number of firms with freezer capacity would increase and a greater portion of the trade in seafood would move into formal marketing channels, decreasing the dominance of bideiras in marketing.

b) International

Demand for prime and some second quality fish, plus crustaceans and cephalopods is strong in European markets. As indicated earlier herein, most of the seafood produced in Guinean waters now enters the international market without being landed in Guinea-Bissau. Changes in licensing policy and incentives for channeling seafood catches into Guinea-Bissau's ports have the potential to enable local fishermen and exporters to increase significantly their participation in marketing of the country's seafood production. The number and size of domestic-based export firms, including those with foreign participation would increase in response to a larger supply of fish channelled into the country.

3.4 Commerce

Rising incomes and gradually changing consumption habits will increase local demand and commerce in fish products. Elimination of government sales of fish into the wholesale market at reduced prices--the benefits of which are not passed on to the consumer--would tend to cause wholesalers to pay higher prices to producers. This would increase supply to the domestic and export market. A larger volume of commerce in fish products would encourage firms to improve and expand refrigeration and storage facilities. It would also increase the frequency of buyers' agents visits to regional fishing landing points. Removal of the government from the marketing system would increase the level of private commerce in fish products.

The key to major expansion of domestic commerce as well as the entire fisheries industry would be changes in overall policies which serve to channel a much greater volume of the total catch from Guinean waters into Guinean ports for a combination of processing and domestic and export sales. Not only would the local fishing industry be strengthened, but also a much larger volume of seafood would enter domestic channels for local consumption.

3.5 Services

Road transportation services have been improved in recent years and will continue to improve, due to a World Bank project which will improve feeder roads in the interior. New ferries, provided under EEC financing, will soon improve agents' capability to transport fresh fish from interior ports such as Cacheu in the north and Cacine in the south to urban markets. Improved storage and processing services will inevitably accompany expanded local and export commerce in seafood products.

A new fishing port, financed by Taiwan, is planned. This will provide some stimulus to the local fishing industry. However, port costs and inefficiencies must also be reduced to make port calls by fishing fleets more attractive and competitive with neighboring countries' ports.

Skill training for employees of processing and commercial firms will be needed as expansion in commerce occurs. Expansion of SIMA's daily price information to include fish products would provide producers, buying agents and consumers with information needed to facilitate in seafood commerce.

4. CONSTRAINTS

The main constraints on development of a Guinean fishing industry are rooted in the policies originating in the immediate post-independence period which established a pattern of foreign domination of fishing. Constraints on changing this policy include dependence upon license fees for foreign exchange revenues, bilateral fishing agreements with donors in which fishing concessions are conditions for development assistance, weak fisheries management capacity including inability to assess the fisheries stock or accurately monitor catch levels, and weak maritime zone enforcement. A lack of capital and credit have limited the ability of local fishermen to invest in the technology and equipment, including industrial fishing vessels, necessary for medium and large scale fishing. As a result of the foregoing conditions, over 90% of the total seafood catches from Guinean waters is sent directly abroad without passing through local processing, marketing and export facilities. Some of the foregoing constraints could be eliminated or at least reduced by policy changes accompanied by an action plan which places high priority on developing a national fishing industry.

TC - 1 POLICY

The **main policy constraint** on developing a local fishing industry is a licensing policy which allows nearly all of Guinea-Bissau's seafood harvest to be captured by foreign fishermen and directly sold abroad without being landed in Guinea-Bissau. This has a negative impact on (1) development of local private production capacity and (2) local shore-based processing, larger scale marketing and exporting, commerce and service industries related to the fisheries sector. Details concerning the impact of this policy on each activity are provided below.

4.1.1 Production

Policy constraints on development of Guinean national fishing production include:

-- Sales of licenses to foreign fishermen without requirements or incentives for bringing catches to Guinean ports for export.

-- Absence of policies giving reduced industrial zone license rates to Guinean or joint-venture vessels or companies maintaining shore facilities in Bissau. Present policies require local firms to pay the same industrial license fees as do foreign owned and foreign based vessels.

- Lack of a consistent enforcement policy and capability to prevent fishing by unlicensed vessels and vessels engaging in illegal fishing practices which damage the sustainability of fisheries stocks.

- Policy decisions reflected in bilateral assistance agreements which offer preferential concessions, including waivers of licensing fees, to certain foreign countries' fishing vessels.

- Government sales of seafood from foreign vessels into the wholesale market at low prices, thus undercutting local producers.

- Policy of not establishing catch limits endangers long-term sustainability of fishery stocks, reducing the incentive to invest in Bissau-based fishing operations;

- Absence of policy providing incentives for conserving the fisheries resource. Current policy incentivates fishermen to maximize catches.

- Inadequate understanding on the part of some government officials concerning the economics of the fisheries industry, fisheries resource management and conservation, of how policies impact on the fishing industry.

4.2.1 Processing

One reason that adequate processing facilities have not developed is that the low volume of fish brought to Guinea-Bissau has not provided incentives for investment in improved and expanded facilities. In 1993 only 920 tons of a total estimated catch of 93,204 tons (industrial zone 45,704 tons plus estimated artesanal zone catch of 47,500 tons) was processed and exported from Guinea-Bissau. Unless a larger proportion of the annual catch is channeled to local ports, the processing industry will not be able to expand.

Thus, those policies which allow and even incentivate--fishing vessels can take catches tax free from Guinean waters to foreign sales outlets whereas fish products exported from Bissau are subject to a 5% export tax--direct sales abroad rather than channeling catches into on-shore processing and export facilities are impediments to development of a national processing industry.

4.3.1 Marketing

a) Domestic

With gradually rising incomes, demand for seafood products is rising. There are no direct policy constraints on domestic marketing of seafood.

b) International

The key policy-induced constraint affecting exports is the fact that current policy allows most of Guinean export quality seafood to be sold by fishermen directly into foreign markets and does not enter Guinea-Bissau's export market. The 5% export tax on seafood products also is a negative factor. Port costs for fishing vessels and freighters are higher in Bissau port than in neighboring ports. These constraints could be addressed through policy changes.

4.4.1 Commerce

The policies permitting fish products to be taken abroad without passing through Guinean commercial channels are a constraint on growth of commerce in seafood. Price controls have been removed. However, government intervention by selling catches obtained from foreign vessels (obtained in return for waiver of license fees) at low prices into the domestic wholesale market hinders the free functioning and development of commerce in fish.

4.5.1 Services

The policy which allows vessels to take catches directly to foreign ports reduces the demand for services to support fishing vessels and thereby impedes the development of adequate repair, maintenance and other services for fishing vessels.

TC - 2 LEGAL AND REGULATORY ENVIRONMENT

4.1.2 Production

Current policies concerning licensing are reflected in the statutes concerning issuance of licensing and fishing practices in both the industrial and artesanal fishing zones. Once decisions to change policies are made, changes in legislation should follow. The current absence of incentives in legislation which would encourage expansion of local fleets and encourage foreigners to enter joint ventures with local operators is a constraint on development of a national fleet. Current legislation concerning enforcement of fishing laws is inadequate.

4.2.2 Processing

Current legislation does not, by itself, constrain expansion of fish processing.
However, it provides no incentives for expanding the volume of seafood products brought to local ports for processing or for foreign investment in local processing facilities. As part of an overall change in fishing policy, legislation should address these issues.

4.3.2 Marketing

a) Domestic

The absence of legislation providing for adequate inspection and control of quality of imports and locally produced products, including fish, can lower consumer confidence in the quality and condition of the product. This is particularly relevant for perishable products such as fish which are sold on the streets by persons who have no refrigeration facilities.

b) International

A 5% export tax is levied on seafood exported from Guinea-Bissau, but not on catches taken directly from fishing grounds to foreign markets. This operates as a constraint on seafood exports. Overly bureaucratic regulations and legislation concerning documentation for exports are constraints or expanding exports.

4.4.2 Commerce

No specific legislation constraining commerce in fish products exists. However, current legislation and regulation affecting commerce in general, such as cumbersome procedures for registration of firms and the centralized nature of government functions act as constraints.

4.5.2 Services

There are no specific legislative constraints on provision of services to support the fishing industry.

TC - 3 JUDICIAL AND ADMINISTRATIVE ADJUDICATION

The lack of a reliable and efficient system for adjudication of commercial disputes is a generic constraint affecting the confidence of potential investors in all sectors of the economy, but particularly in the fisheries sector where investments usually must be large and the risks are high. This is a constraint affecting each of the activities listed below, with the possible exception of domestic marketing.

TC - 4 PRIVATE SECTOR

4.1.4 Production

As indicated earlier herein, an inadequate policy framework has created an environment which lacks incentives for the development of a local fishing industry. However, there are also other factors that impede expansion of local production. A lack of traditional fishing experience and technical skills hindered the development of a national fishing fleet capable of competing on even terms with foreigners, such as Senegalese and Guinea Conakry fishermen for artesanal zone seafood. This, plus the lack of capital and credit which would enable local operators to obtain expensive vessels and equipment has also hindered the development of a national industrial fishing fleet. Although donor projects have provided more training and support for artesanal fishermen than perhaps any other productive sector, there has been a lack of training Guinean participation in industrial zone production.

The lack of port facilities dedicated to servicing fishing vessels and providing storage for small scale producers is also a constraint on expanding production. High fuel costs (gasoline for outboard motors costs GP9500 ($.74) per liter).

Until recently, there was no national organization of fishing industry operators which could represent the producers' interests vis-a-vis government policy makers. Such an organization has been established, but it is still in the process of developing its capabilities and needs assistance in defining its role.

4.2.4 Processing

A major constraint on the development of processing facilities has been the lack of an adequate volume of seafood being brought to local ports for processing. The policy-related reasons for this have been described earlier. Lack of port facilities dedicated to servicing a fishing industry is another impediment to increasing volume of product brought to port and, thereby, increasing the demand for processing. Another related constraint on port calls is the sixty mile channel through which fishing vessels must travel to enter and leave port. Fishing vessels lose a day of fishing time coming in and a day returning to fishing areas.

High costs of electricity needed for freezing and processing are a significant constraint, reducing local competitiveness with the ports of Banjul and Dakar.

4.3.4 Marketing

a) Domestic

Transportation, collection and distribution systems impede marketing of a highly perishable product. Retail bideiras do not have refrigeration facilities and must sell their product, hence the volume they buy from producers or wholesalers is limited to the amount they can sell in a day.

Retail marketing is seafood is entirely conducted by the informal sector and quality control is a problem. Another constraint on marketing is the limited purchasing power of most of the population.

b) International

A few local firms have developed export capabilities and are engaged in exporting. Once again, the principal constraint to expansion of exports is the small volume of seafood which is landed for export markets. As in other areas of commercial activities, local seafood exporters lack knowledge of foreign markets, export and financing procedures and business practices.

Freight companies charge higher rates for shipments from Bissau than from other ports such as Banjul and Dakar. Port calls to Bissau by freighters are irregular, thus impeding exporters' ability to fulfill foreign marketing obligations in a timely manner.

4.4.4 Commerce

A combination of factors contribute to the low level of commerce in seafood. These include the low income level of the population, low domestic producer prices (partially caused by government sales at fixed low prices), higher prices in neighboring countries which diverts supplies from the domestic market. The current level of commerce does not encourage expansion of the number of agents buying from fishermen and the small number of agents contributes to a lack of domestic competition for local fishermen's catches. This too, acts as a disincentive for producers to sell to the domestic market. Other constraints include the lack of credit for investment in the local fishing industry. Technical assistance to guarantee quality control of seafood is not available. The local artesanal fishing association needs assistance in finding it proper role and providing services to members in the fishing industry.

4.5.4 Services

Refueling services in Bissau are adequate. However, the absence of a full and adequate range of services to support fishing vessels and an expanded local fishing commerce and industry is a constraint.

PRIMARY OBJECTIVE REPORT

	units	1986	1987	1988	1989	1990	1991	base-year 1992	1993	1994	1995	1996	1997	potential 1998
roduction total	tons					125,990	100,000	89,500	96,641					
artisan	tons				10,000	7,990	15,000	47,500	47,500					
formal	tons				5,400	7,990	4,800	2,200	3,500					
informal	tons				4,600		10,200	45,300	44,000					
licenced - international	tons					118,000	85,000	42,000	49,141					
shrimp	tons								2,500					
Demersais	tons													
Pelagicos	tons													
Cephalopodos	tons													
rocessing														
primary	tons				844	1,495	2,829	3,000						
secondary	tons													
final	tons													
larketing:														
domestic								12,500	12,500					
formal	tons													
informal	tons													
exports														
formal		430	111	370	844	1,495	2,829	3,000						
frozen shrimp	tons	176	83	173	177	445	360							
frozen fish	tons	254	19	186	450	1,019	1,387							
others	tons			11	217	31	0							
licenced	tons							75,000						
informal	tons				4,600	0	10,200	10,200	35,000					

international					
shrimp	US$/t			7,000	
Demersais	US$/t			1,200	
Pelagicos	US$/t			1,500	
Cephalopodos	US$/t			2,500	
artisan					
formal	US$/t				
informal	US$/t				
ocessing					
primary	US$/t				
secondary	US$/t				
final	US$/t				
arketing:					
domestic					
formal	US$/t				
informal	US$/t				
exports					
formal	US$/t				
frozen shrimp	US$/t				
frozen fish	US$/t				
others	US$/t				
informal	US$/t				

international		US$m				
shrimp		US$m				
Demersais		US$m				
Pelagicos		US$m				
Cephalopodos		US$m				
artisan						
formal		US$m				
informal		US$m				
rocessing						
primary		US$m				
secondary		US$m				
final		US$m				
arketing:						
domestic						
formal		US$m				
informal		US$m				
exports						
formal		US$m				
frozen shrimp		US$m				
frozen fish		US$m				
others		US$m				
informal		US$m				

ꞮIMARY OBJECTIVE REPORT

	Overall Economic Score		
Supporting Commerce			7
General	0	5	
Specific	0	6	7
Supporting Services			
General	3	4	6
Specific	0	3	8

on:

Supporting Commerce : retail, wholesale, trading, financial, brokerage and other business

Supporting Services: transportation, communication, information, extension, skill training, and other business services

oring system is as follows:

0 to 2 little or no support

3 to 4 some support

5 medium support

6 to 7 good support

to 10 excellent support

114

VII. GENERAL COMMERCE

Guinea-Bissau's general commerce is divided into two spheres, each with distinct implications for national development. One sphere is made up of mostly small-scale enterprises in both rural and urban areas, which needs to be supported and encouraged to develop. The second sphere is composed of large scale, nominally formal firms, which mostly operate informally by avoiding taxes and side stepping the legal procedures.

Working within these two spheres are basically two major, cross-cutting, competing types of marketing systems, with a number of variations forming a continuum rather than a dichotomy: the centralized, merchant-based entrepot type marketing system, and the decentralized, itinerant trader or multivalent type marketing system.

1. HISTORY

The Entrepot Type Marketing System

The entrepot system originated during the colonial period, continued through the first years after independence, and has begun to decline since economic liberalization. During the colonial period, the most prominent apical firms were Casa Gouveia and Ultramarina, although a few smaller private firms provided some competition. These firms competed among themselves for clients. The main strategy they employed was to advance merchandise to regular customers on credit. In return, clients agreed to pay their loans in pre-determined quantities of exportable agricultural produce.

After Independence, colonial enterprises, such as Casa Gouveia and Ultramarina, were nationalized under the Armazem do Povo and Socomin, taking over the same supply and marketing channels, and adopting the same lists of clients. The small merchants who were clients of state-run enterprises had clients of their own: producers. During both the colonial and post-independence period, small merchants in regional towns and administrative posts offered a variety of important services and consumer goods to attract producers to their shops. Merchants often required payment for all their goods and services in produce. These strategies not only made the services more accessible to rural producers but also brought merchants closer to the low farm-gate prices of production sites.

The Multivalent Type Marketing System
Variants of the multivalent marketing system pre-date colonial rule and link Guinea-Bissau to trans-Saharian and other neighboring trade networks. There are two types of networks which were particularly important historically: itinerant Muslim male trader ("djila") based inter-regional systems, and interlinked rotating market systems.

2. CURRENT

Today, the entrepot system continues to dominate the marketing of cashew and palm kernels. The Armazem do Povo has been partially privatized. Former functionaries were given the opportunity to purchase sales posts, in order to establish private businesses. Many of the large merchants today began as functionaries of these post-independence state enterprises. The entire system continues to rely heavily upon informal advances of consumer goods, to be paid in local produce mainly rice which can be traded at all levels and in all areas of the country.

As was the case through the colonial period and early after Independence, a significant portion of the firms within the entrepot system, which supposedly engage exclusively in formal sector activities, in reality participate extensively in the informal sector, interacting with producers, based upon informal exchanges, contracts, and codes of behavior.

The economic reforms and road improvements over the last five years have stimulated a drastic decline in the entrepot system, and a corresponding expansion of multivalent marketing systems. There are four reasons for the decline of the entrepot system. First, with the reduction on import restrictions, small merchants have lost their monopoly on consumer goods, which had been the source of appeal to producers. Instead, producers either engage in marketing themselves or choose to exchange their produce with middlemen who offer competitive prices or reduced transaction costs by purchasing closer to the production site. Second, small traders have more flexibility to acquire merchandise from a diversity of suppliers or to alter the areas in which they distribute their goods. Third, with less free market experience, licensed merchants are generally slower in acquiring basic market information. Finally, licensed merchants tend to have less freedom to alter prices, since they work with longer term contracts set at fixed rates and pay heavy licensing fees and informal transfers.

Presently, not only do participants in the entrepot system interface with those of the multivalent system, but actors increasingly move in and out of the various systems as the relative advantages of engaging in stable, hierarchical or flexible horizontal marketing relations change. One of the clearest examples of this overlap is the appearance of what may be called the new intermediary entrepot system. This type of system has developed in the last few years, as economic reforms have undermined the monopoly formerly held by larger patron firms and the licensed merchants of the entrepot type.

This new intermediate marketing type is the product of price liberalization and a more competitive environment, in which concerns for efficiency, value, and cost effectiveness are eroding patron-client relationships and the informal credit system based upon ties of indebtedness and gratitude.

3. POTENTIAL

Guinea-Bissau's rapidly expanding markets reflect a wider trend of a burgeoning informal sector. Many new actors are experimenting with marketing for the first time, testing new inventories, or exploring new markets. These new actors come from every walk of life, including rural producers, urban unemployed and dependents, former civil servants, current state employees, and their families. Informal sector activities are increasingly becoming a major source of full time or part time employment and income.

The number of consumers and producers, the distance they travel, and the quantity and array of goods sold, have increased dramatically in the last few years. This expansion is occurring on an unprecedented scale.

A number of specific factors appear to promote market expansion. Foremost is price liberalization which has created incentives for marketing agents to provide new goods, improve distribution networks, and experiment with quality. The supply of consumer goods to remote areas has greatly increased, raising the incentives for producers to commercialize their produce.

Another crucial factor is road improvement and the increased predictability of supply and demand that this affords. Better roads, have greatly motivated urban buyers to purchase their supplies at distant markets.

4. CONSTRAINTS

Several factors restrict market growth and require solutions before additional market expansion is possible.

One of the major problems is that many rural markets suffer from an insufficiency of cash. Rural producers sell their produce in order to acquire cash to buy consumer goods. When cash is not available, buyers are forced to barter, or when there is no cultural tradition for this or when equivalencies are difficult to establish, return home empty handed. This problem appears to be less pronounced in markets in border towns, where FCFA or Franc Guineen are used interchangeably with GP.

Another constraint is the lack of commercial agents, such as brokers and dispatchers.

Additionally, the rules and regulations governing general commerce are not clearly defined, especially in the areas of importation and exportation.

Perhaps one of the most significant constraints is the deficiencies in the functioning of state and formal sector institutions, partly due to lack of knowledge of the new economic system, which undermine economic growth. In theory, state and formal sector institutions, such as bank, import-export companies, and transport firms are modeled on western financial and trading procedures, and depend upon publicly legitimized sanctions. For marketing systems to function in a predictable fashion that can be analyzed using formal economic criteria, formal institutions supporting or influencing these systems need to function as they are designed. Neutral financial, judicial, and administrative institutions with monitored accountability and universally applied procedures are essential for economic growth.

In practice, then, ostensibly formal institutions in Guinea-Bissau operate along informal lines. Formal institutions are unable to function as designed because many of their procedures and structures, such as accounting and reporting, are ill suited to local conditions. The resulting transaction costs encourage both employees and clients of these systems to adopt informal modes of operation. Patronage ("cunhas"), informal transfers, and high transaction costs are guiding principles in the operation of banks, courts, administrative offices, and licensed private enterprises. This latent mode of operation has produced growing weakness in many formal trade and financial institutions.

Also the lack of improved processing and storage systems have great potential to promote market expansion, by allowing national produce to reach more distant markets.

VIII. GENERAL SERVICES

Several services are provided in order to facilitate the flow of marketed goods or add to their value, without producing or changing them. These services include: a credit/finance system, a transportation system, a storage system, and an information system.

1. HISTORY

General services in the private sector during the colonial period did not change after Independence This was because the economy was dominated by the biggest commercials enterprises: "Casa Gouveia and Ultramarina" in the colonial period and "Armazem do Povo and Socomin" after Independence. These state enterprises had their own transportation support services which included trucks and boats.

2. CURRENT

2.5 Services

a) Finance and Credit Systems

The informal sector, for the most part, does not use credit for its marketing activities. Similarly, licensed merchants are increasingly relying upon income from real estate, transport, and other services for working capital to sustain their businesses. For many small scale marketers, at least, calculating realistic profit margins, expenses, and interest rates, and the time required from repayment of loans is a difficult and unfamiliar undertaking. For these reasons, many marketers shy away from loans that do not fall within indigenous norms of social obligation and reciprocity.

Nevertheless, the extension of credit is widespread, although it assumes a variety of forms. With the exception of bank credit and the credit and saving services provided by several informal guilds, credit in Guinea-Bissau is provided through a diffuse set of relationships.

Kin based credit The most common loans in the country occur outside of formal financial institutions; among relatives, neighbors, friends, following traditional customs. Often these loans are given to a family member who wants to start a business. The most common social sanctions against nonpayment are public ridicule and future problems in acquiring credit.

Client-oriented credit Most informal marketing occurs through an advance of cash, goods, and/or services, from a money lender to a prospective client. The most common form of credit is the short-term loan of goods usually in relation to the entrepot system.

Bank credit Bank credit is simply inaccessible to the average small informal marketing agent, who has neither the money, possessions, procedural familiarity or connections required to obtain a bank loan.

b) Transport System

As a market support service, transport has a direct impact on market size and expansion. Transport systems influence the regularity in the supply of consumer goods. Of the four market support service systems discussed, transportation has perhaps undergone the most substantial expansion over the last years. For the most part, participants in both the entrepot and multivalent marketing systems rely upon the same transport agents and infrastructure to accomplish their activities. Types of transport vary, however, depending on whether they fulfill production, wholesale, retail, or distribution functions.

c) Storage System

Storage systems include the physical facilities required to keep goods, as well as the conditions, products, and services which facilitate longer term and quality maintenance of stocks. Marketing agents use the term "warehouse" to designate both facilities dedicated to long term storage and those which combine short-term storage with wholesale and retailing services.

Inadequate storage facilities, particularly cold storage, currently exist in Guinea-Bissau, especially in the rural regions.

d) Information System

Two sources provide price information to marketing agents in the country. The first is first-hand experience with prices in Bissau. A second source of price information is long distance traders who transmit regular news about market information in neighboring countries.

A market information system has been implemented with TIPS support through two private associations, CCIA and ANAG.

The Statistics Department of the MDRA also collects information on the prices of agricultural products.

3. POTENTIAL

The service sector in Guinea-Bissau is growing due to the increased economic activity and the demand for more and better transport, storage, and information services, since economic activity is growing and some rules of the game are being clearly defined.

4. CONSTRAINTS

The major policy constraints are the deficiencies in the functioning of formal public sector institutions which undermine economic growth.

Another policy constraint for general services is the Government's lack of investment in primary education and health.

A private sector constraint that needs to be addressed is the lack of basic business and accounting skills.

Another private sector constraint is the hot, unsanitary, and uncomfortable conditions of the markets.

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RESEARCH

I. RICE

Production

Conduct an economic study on rice farming systems including: a) production costs of the three cultivation systems: "bolanha salgada", "sequeiro", and "bolanha doce", and b) a comparative study on rice production between the major ethnic groups.

Processing

Conduct a study on different sizes and types of rice processing mills, specifically looking at location, centralized or decentralized, cost/benefit, efficiencies, scale, and return on investment.

Marketing

Within the general comprehensive study on cross border trade for the critical growth sectors (see general commerce), determine whether "bolanha" rice is exported in cross border trade (or is imported rice being exported).

II. Cashew

Production

Conduct a sector study on cashew economics, including policy constraints (i.e. effects of the export tax on planting and production), production costs, investment responses to cashew price changes and the cross elasticity between rice prices and cashew investments in plantings, and production projections for the next five years (currently being conducted).

Produce a desk survey of "traditional" small producers to identify existing producers associations, service providers, and support organizations, and to develop models of their production activities and commercial flows, in order to create a data base and publish a series of production profiles of the major groups.

Conduct an economic study on cashew management systems, in particular, plantings (spacing and thinning).

Conduct a study on the cashew commercial system from producer to consumer, including all of the commercial agents, their numbers, the services they provide, an estimation of their costs and margins, and the possibility of producers associations participating in commercial activities, including exportation.

III. FRUITS

Production
Conduct a study in the fruit sector to look at the producers: determine what they are currently producing and the potential to produce fruits (either current varieties, improved current varieties, or different varieties) for exportation to the European market.

Processing
Conduct a market study to determine the local demand for processed fruits, i.e. fruit juices. Additionally, determine if there is export potential for processed fruits; if so, determine which fruits could be marketable.

Services
Conduct a survey to determine Guinea-Bissau's existing capacity for packing and storage facilities (houses).

Research the cost of inputs for post harvesting products for fruits (ex. packaging boxes).

IV. VEGETABLES

Production
Conduct a study to identify producers in the vegetable area, determine what they are currently producing and the potential to produce vegetables (either current varieties, improved current varieties, or different varieties) for exportation to the European market.

Processing
Conduct a market study to determine the local demand for processed vegetables, i.e. tomato paste. Additionally, determine if there is export potential for processed vegetables; if so, determine which vegetables could be marketable.

Services
Conduct a survey to determine Guinea-Bissau's existing capacity for packing and storage facilities (houses).

V. FORESTRY

Production
Conduct an environmental impact study to determine the sustainable rate of harvesting.

Study alternative systems of concessions that guarantee the sustainable use of the forests and bio-diversity.

Marketing
Study the entire legal system of forest concessions and exportation of wood.

Conduct a study to determine various ways to lower or limit the local use of charcoal and firewood. (A possible solution may be to create a policy whereby charcoal and firewood use is restricted to family use and rural consumption only.)

Conduct a market study on wood products for both exportation and domestic use.

VI. FISHERIES

Production
Conduct a study to determine the sustainability levels of the fish stock needed to maintain this natural resource. (This study is currently being conducted by Kaczynski.) Analyze the existing data in both the industrial and artesanal zones to determine the sustainability level.

Marketing
Look at fish consumption in Guinea-Bissau. FAO statistics estimated per capital consumption in 1992 at 7 kg. A more recent study estimated consumption at 25 kg per capita. Determine where and how FAO is getting its data.

VII. GENERAL COMMERCE

Conduct an extensive economic study on cross border trade (both formal and informal) which will include: policy constraints, economic importance, volume and type of goods imported and exported, systems of operations, costs, and inefficiencies for the six critical growth sectors (cashew, rice, forestry, fisheries, fruits, and vegetables). Product projections will be made for a five year period.

Conduct a study on Bandim market in Bissau which will include policy constraints, economic importance, volume and types of goods sold, systems of operations, costs, distribution of space and stalls, taxation, other costs, service systems such as sanitation, water, garbage collection, electricity, security, and shelters.

Study the impact of current laws on commerce (both domestic and international).

The current tax system appears to act as a disincentive on exports and consequently on production and investment, while at the same time it is deficient in providing revenues to the treasury. This is a complex and politically sensitive area affecting not only the government but also interests of various donors. A study analyzing current tax policies and their impact on private T&I and government revenues should be conducted with the objective of identifying policy changes which would remove constraints on and provide incentives for increased private T&I while being politically feasible.

Not enough is currently known concerning policy factors which currently influence decisions of potential local and foreign investors. To fill this gap two studies should be carried out:

1) A research study, conducted with the collaboration of the Offices of Investment Support (GAI), to identify policy, bureaucratic, legal and other factors which influence positively or negatively decisions of firms/individuals to invest or not invest in proposed projects.

2) As a follow-up to the above research, conduct an analysis and develop recommendations for policy, legal and regulatory changes to improve the climate for investment.

To assess the impact of the changes in the judiciary system and the training for lawyers and magistrates during the past year and a half, a study will be conducted of the number of court cases nation wide, those involving T&I disputes, and the results thereof. The baseline for comparison will be a similar study of 1991/92 court cases which was conducted during 1993 and early 1994.

VIII. GENERAL SERVICES

Conduct a general cost study on international transportation of agricultural products, including both air and sea.

Produce a study on the impact of lack of credit on agricultural production and marketing.

Among the constraints on trade, including exports, are the irregular shipping services from Bissau port and the cost of shipping from Bissau. In some cases imports and exports are off-loaded in Banjul and Dakar and transported to Bissau by truck. Among the factors underlying this practice are policies affecting port costs and management. Similarly, the cost of port calls and the lack of a policy which provides incentives for industrial zone fishing vessels to use Bissau port constrains the development of the on-shore fisheries industry. Documentation of the problems concerning port usage is needed to provide a foundation for changes in policies bearing on port management and costs. A study should be conducted which analyzes and compares policies and costs of the ports in Banjul, Dakar, and Bissau. Particular emphasis should be given to give TIPS and policy makers an understanding of the impact of current port costs and management on international commerce and the fishing industry.

Available bank credit in Guinea-Bissau is almost entirely limited to short-term loans for commercial purposes and is provided to persons or firms which already have some money, possessions and connections needed to obtain a bank loan. Even for those possessing the foregoing assets, medium and long-term bank credit needed for investing in starting up small industries or businesses is not available. The only credit sources available for small informal operators is "kin-based" and "client based" credit which is also usually short-term and used mainly in commercial transactions. Some special donor "project-related" credit has also been provided. TIPS has conducted a study of current and past credit programs and their performance. This should be followed by a study of policy and fiscal changes needed to create an environment in which medium and long-term bank credit can become available for private sector operators.

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TIPS

WORK PLAN STATUS REPORT

SUMMARY

PERIOD

10/1/93 TO 12/31/94

TRADE AND INVESTMENT PROMOTION SUPPORT - TIPS

MMARY

.EPs BY MONTH - STATUS AS OF 9/30/94

	Status as of 9/30/94		93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12
Sub-Totals	Started	46	6	1	0	6	4	4	3	11	0	6	1	4	0	0	0
	To be started	25	0	0	0	0	0	0	0	0	0	0	0	0	9	16	0
	Due	79	1	0	2	3	5	3	8	1	12	2	6	3	6	3	24
	Completed	48	1	0	2	3	5	3	8	1	12	2	6	3	2	0	0
2																	
Sub-Totals	Started	26	0	1	0	1	1	2	5	0	5	3	0	8	0	0	0
	To be started	16	0	0	0	0	0	0	0	0	0	0	0	0	11	5	0
	Due	52	0	0	0	0	0	4	0	10	2	4	0	0	8	7	17
	Completed	22	0	0	0	0	0	4	0	10	2	6	0	0	0	0	0
3																	
Sub-Totals	Started	23	0	0	0	1	1	1	2	8	1	2	1	6	0	0	0
	To be started	14	0	0	0	0	0	0	0	0	0	0	0	0	13	1	0
	Due	47	0	0	0	0	0	0	2	7	7	2	2	2	8	8	9
	Completed	22	0	0	0	0	0	0	2	7	7	2	2	2	0	0	0
4																	
Sub-Totals	Started	39	0	1	0	0	11	2	2	5	2	5	5	6	0	0	0
	To be started	20	0	0	0	0	0	0	0	0	0	0	0	0	19	1	0
	Due	72	2	3	0	0	0	4	1	5	3	1	3	12	12	20	6
	Completed	34	2	3	0	0	0	4	1	5	3	1	3	12	0	0	0
.ALS																	
	Started	134	6	3	0	8	17	9	12	24	8	16	7	24	0	0	0
	To be started	75	0	0	0	0	0	0	0	0	0	0	0	0	52	23	0
	Due	250	3	3	2	3	5	11	11	23	24	9	11	17	34	38	56
	Completed	126	3	3	2	3	5	11	11	23	24	11	11	17	2	0	0
			10 93	11	12	1 94	2	3	4	5	6	7	8	9	10	11	12

TRADE AND INVESTMENT PROMOTION SUPPORT - TIPS

ARY

HNICAL INPUTS

	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12	Total Allocations Days
RM EXPATRIATE - (LTX)																
POL	23.00	5.79	6.79	10.37	16.29	22.12	19.12	21.68	22.85	20.10	31.90	47.40	38.98	24.90	12.42	323.67
LEG	8.00	0.00	0.00	0.00	6.08	16.95	12.95	14.25	13.92	13.92	24.15	36.99	42.98	30.98	12.50	233.67
PVT	22.00	0.00	0.00	0.00	17.61	34.09	24.93	34.93	31.18	26.09	27.89	45.89	49.61	26.64	16.14	357.00
	53.00	5.79	6.79	10.37	39.98	73.16	56.99	70.86	67.94	60.11	83.94	130.28	131.56	82.51	41.06	914.33
M LOCAL - (LTL)																
ECO	0.00	0.00	0.00	0.00	0.00	0.86	1.86	2.80	2.80	7.14	29.14	33.64	28.75	23.42	15.78	146.20
L&J	0.00	0.00	0.00	0.00	1.08	11.54	13.71	16.98	12.23	19.17	26.47	37.13	38.81	27.23	14.75	219.10
AGB	0.00	0.00	0.00	0.00	23.17	28.60	18.60	32.93	25.93	28.43	26.77	38.27	42.84	28.73	9.73	304.00
AGE	0.00	0.00	0.00	0.00	16.17	22.60	20.60	25.27	22.27	20.27	23.27	32.77	33.34	18.23	14.23	249.00
TRN	0.00	0.00	0.00	0.00	0.50	3.10	7.10	4.43	13.43	14.43	21.50	20.00	32.83	37.00	7.33	161.67
JAMANCA								15.00				11.25	11.25	11.25	11.25	60.00
	0.00	0.00	0.00	0.00	40.93	66.70	61.86	97.42	76.67	89.45	127.15	173.06	187.82	145.85	73.07	1139.97
	10 93	11	12	1 94	2	3	4	5	6	7	8	9	10	11	12	

	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12	Total Allocations Days
ERM EXPATRIATE - (STX)																
STX	39.50	25.50	18.00	32.67	43.67	21.67	16.67	26.17	27.17	27.00	28.00	0.00	18.00	66.00	48.00	438.00
STX	0.00	0.00	0.00	0.00	2.50	20.50	0.00	34.00	12.00	6.00	0.00	22.00	92.50	68.50	35.00	293.00
STX	0.00	0.00	0.00	0.00	0.50	1.10	2.10	25.10	1.10	1.10	0.00	0.00	4.00	9.00	0.00	44.00
STX	4.00	36.00	0.00	0.00	0.00	36.00	2.00	1.00	31.00	2.00	0.00	52.00	76.00	82.00	22.00	344.00
STX	43.50	61.50	18.00	32.67	46.67	79.27	20.77	86.27	71.27	36.10	28.00	74.00	190.50	225.50	105.00	1119.00
ERM LOCAL - (STL)																
STL	15.00	55.67	55.67	43.67	51.00	33.00	10.00	45.00	48.00	18.00	9.00	9.00	18.00	36.50	27.50	475.00
STL	0.00	26.67	26.67	26.67	51.67	63.67	26.67	67.00	24.00	33.00	9.00	90.00	116.25	90.75	63.25	715.25
STL	0.00	0.00	0.00	0.00	0.50	0.50	8.00	27.87	38.37	70.45	69.78	70.78	71.58	37.83	22.33	418.00
STL	4.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00	41.00	41.00	145.00	178.83	140.33	139.83	61.00	771.00
s STL	19.00	82.33	82.33	70.33	103.17	97.17	44.67	159.87	151.37	162.45	232.78	348.62	346.17	304.92	174.08	2379.25
	115.50	149.62	107.12	113.37	230.74	316.29	184.29	414.41	367.24	348.11	471.87	725.96	856.05	758.78	393.20	5552.55
	10 93	11	12	1 94	2	3	4	5	6	7	8	9	10	11	12	

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TRADE AND INVESTMENT PROMOTION SUPPORT - TIPS

SUMMARY

C. TRAINING

Status		#	Training Days	Trainees/Women	Estimated Cost ($)
TC1	TR-OS	6	88	20	$0
	TR-L	15	39	969/24	$0
TC2	TR-OS	2	33	13/3	$57,025
	TR-L	10	78	890/55	$18,500
TC3	TR-OS	4	15	15	$26,000
	TR-L	11	262	322/19	$70,525
TC4	TR-OS	2	20	12/3	$32,010
	TR-L	19	236	3587/628	$59,700
Sub-Total:	**TR-OS**	14	156	60/6	$115,035
Sub-Total:	**TR-L**	55	615	6178/956	$148,725
TOTAL:		69	771	6238/962	$263,760

TRADE AND INVESTMENT PROMOTION SUPPORT - TIPS

SUMMARY

D. COMMODITIES

Status		#	Total Cost
TC1	COM-OS	0	$0
	COM-L	0	$0
TC2	COM-OS	2	$12,000
	COM-L	0	$0
TC3	COM-OS	16	$62,836
	COM-L	0	$0
TC4	COM-OS	13	$24,600
	COM-L	4	$1,000
Sub-Totals	COM-OS	31	$99,436
Sub-Totals	COM-L	4	$1,000
Total:		35	$100,436

TRADE AND INVESTMENT PROMOTION SUPPORT - TIPS

SUMMARY

E. MISCELLANEOUS

Status		#	Total Cost
TC1	MISC-OS	0	$0
	MISC-L	0	$0
TC2	MISC-OS	2	$4,400
	MISC-L	0	$0
TC3	MISC-OS	10	$69,000
	MISC-L	0	$0
TC4	MISC-OS	1	$10,000
	MISC-L	3	$45,000
Sub-Totals	MISC-OS	13	$83,400
Sub-Totals	MISC-L	3	$45,000
Total:	**0**	**16**	**$128,400**

TIPS

WORK PLAN STATUS REPORT

TECHNICAL COMPONENT - 1

POLICIES AND IMPLEMENTATION STRATEGIES

PERIOD

10/1/93 TO 12/31/94

TIPS

WORK PLAN STATUS REPORT

TECHNICAL COMPONENT - 1

POLICIES AND IMPLEMENTATION STRATEGIES

PERIOD

10/1/93 TO 12/31/94

POLICIES AND IMPLEMENTATION STRATEGIES - TC 1

SUMMARY: OUTPUTS & SUB-OUTPUTS

OUTPUT 1A - IMPROVE UNDERSTANDING AND ACCEPTANCE

SUB-OUTPUT 1A 1: Policy Maker's Understanding of Market Economics, Constraints and Opportunities Improved

OUTPUT 1B - DEVELOP AND IMPLEMENT POLICIES

SUB-OUTPUT 1B 1: Ministry of Commerce and Industry - MC&I

SUB-OUTPUT 1B-2: Ministry of Rural Development and Agriculture - MRDA

SUB-OUTPUT 1B 3: Investment Policy and Support and Improved

SUB-OUTPUT 1B 4: Ministry of Fisheries

OUTPUT 1C: IDENTIFY AND ANALYZE CONSTRAINTS AND PRODUCE REPORTS AND WORK PLANS

SUB-OUTPUT 1C 1: Database Improved

SUB-OUTPUT 1C 2: Research Agenda

SUB-OUTPUT 1C 3: Identify Fisheries Sector Policy Constraints and Develop Reform Proposals

SUB-OUTPUT 1C 4: Workplan

POLICIES AND IMPLEMENTATION STRATEGIES - TC 1

ANNUAL REPORT: OUTPUTS & SUB-OUTPUTS

OUTPUT 1A - IMPROVED UNDERSTANDING AND ACCEPTANCE

Throughout most of the year the pre-election atmosphere described in the General Narrative to TC 1 prevailed. Guinea Bissau's first democratic multi-party elections for President and a 100 seat National Assembly were held July 3. The ruling Partido Africana para a Independencia da Guiné e Cabo Verde (PAIGC) won a majority of 62 seats in the Assembly. The PAIGC's presidential candidate, President Joao Bernardo Vieira, won a plurality and wnet on to win a majority in a run-off election on August 7. His inauguration took place on September 29, but a new cabinet has not yet been appointed. Significant changes will occur at the ministerial level; however, some of the officials with whom TIPS has been engaged in reform activities are expected to either retain their current jobs or shift to other cabinet posts. Therefore, in the new round of briefings planned with the post-election government, TIPS will be able to build upon the cooperation and understanding already developed through activities earlier in the year.

Activities under this Output were aimed at building understanding and acceptance of TIPS, its objectives, existing constraints and the kinds of reforms needed to increase T&I in the CGSs. Despite the pre-election atmosphere and the focus of most GOGB leaders on politics, rather than reform, TIPS succeeded in making its objectives and reform objectives known to the country's public and private sector leaders. An understanding of some constraints affecting private T&I has been developed, particularly among the leaders in target areas for policy change which were the focus of AEPs in TC 1.

The President endorsed policy changes concerning commercial policy which the Ministry of Commerce and Industry (MC&I) developed with TIPS support and has welcomed TIPS' policy work in the agriculture and fisheries sectors. TIPS, through its work with MC&I and discussions with the MC&I Minister, convinced the Minister of the negative impact on producers of the 10% surtax on cashew exports. The tax was not applied this year.

The Fisheries Minister has cooperated fully in TIPS' analysis of policy and other constraints affecting the sector and has agreed to proceed with development of proposals for reforms and an action plan. In MRDA, while full cooperation concerning TIPS involvement was achieved, the work with TIPS has been carried forward by senior technicians. Throughout 1994, due to the Minister's heavy involvement in the election, top level leadership was not prepared to undertake major policy changes. However, cooperation was forthcoming for work aimed at "re-dimensioning" and "down-sizing MRDA's role and functions.

Enthusiastic cooperation of the Justice Minister, the Chief Justice of the Supreme Court and their staffs was achieved for TIPS's work in TC 3 developing an independent and effective judiciary. TIPS did not focus much attention on the previous "lame-duck" National Assembly, but since the elections has begun discussions with the new Assembly's leadership to develop improved understanding of T&I matters and convey TIPS willingness to assist the Assembly and its staff. TIPS was able to enlist the support of the principal private sector leaders and organizations. Conferences organized with their cooperation provided the fora for speeches on policy issues by TIPS staff to audiences of both public and private sector representatives, and to a broader public through TV and extensive press coverage of the speeches.

SUB-OUTPUT 1A - POLICY MAKERS' UNDERSTANDING OF MARKET ECONOMICS, CONSTRAINTS AND OPPORTUNITIES IMPROVED

During its first two months of activity, TIPS briefed the President, Prime Minister, Ministers, Secretaries of State, senior technicians of key ministries, the Chief Justice of the Supreme Court, donor and NGO representatives, and private sector leaders including the Chamber of Commerce, Industry and Agriculture (CCIA), the National Association of Agriculture Producers (ANAG), and the National Association of Artesanal Fishermen (ANEP) concerning TIPS' objectives and activities. Nineteen such individual briefings were held during the period November 15, 1993 to January 15, 1994. Additional briefings of these and other relevant persons were conducted throughout the year, including 20 meetings with Ministers and three meetings with President Vieira. During these meetings TIPS communicated its perspective on policy issues such as the export tax on cashews, the need for establishing priorities in the Ministry of Rural Development and Agriculture, decentralization and de-bureaucratization of the Ministry of Commerce and Industry, and problems inherent in current policies concerning the fishing sector.

To reach broader audiences, public speeches, radio and newspaper interviews were held. Key TIPS expatriate and local technical staff contributed to this effort. The Project Coordinator delivered 14 speeches on various reform issues and TIPS' activities and objectives. One speech, delivered at the request of the National Election Commission identified common problems encountered in first-time multi-party elections.

Another important facet of work under this Ouptout (and under Output B as well) was the selection and support of participants for study tours and seminars which contributed to the participants understanding of how a private sector-driven economy best functions and the kinds of problems private firms face. The practice of forming mixed public and private sector working groups, conducting workshops, and working alongside of expatriate TIPS consultants and TIPS staff contributed significantly to evolution of officials' understanding of reforms and how to successfully implement reforms. Conferences, seminars and face-to-face working relationships with public officials helped develop support and acceptance for private sector oriented reforms and policies.

OUTPUT 1B - DEVELOP AND IMPLEMENT POLICIES

TIPS efforts in developing and implementing policy reforms this year focussed on priority areas identified in TIPS preliminary constraints analysis, those highlighted in USAID/Bissau's "Assessment of Program Impact 1993", and in early research undertaken under this year's workplan. Some of the work was of a start-up nature and influenced somewhat by the pre-election environment. Emphasis was placed on developing cooperation and full participation in target areas and identification of stakeholders and losers in specific reform areas.

In some areas such as commercial policy and legislation, TIPS was able to build on and accelerate momentum achieved under the USAID-sponsored Implementing Policy Change (IPC) project. In the area of commercial policy, major policy changes in policy leading to enactment of new legislation and the start of decentralization of MC&I organization and functions were achieved. Policy decisions were made to simplify and streamline procedures for registration of firms and obtaining licenses and permits and to decentralize MC&I functions and services to facilitate access and support private commercial operators in the interior. Plans for implementation are being developed. In the agriculture sector progress was achieved in defining MRDA priorities, rethinking the role of the Ministry in a private sector economy, and active work in identifying services that may be accomplished more effectively by the private sector. In the fisheries sector, full cooperation of the Fisheries Minister was achieved in support of TIPS work to analyze and develop major reform proposals.

SUB-OUTPUT 1B 1: MINISTRY OF COMMERCE AND INDUSTRY (MC&I)

TIPS work with MC&I built upon previous IPC work, including a 1993 analysis of and report on the Ministry's functions, organization, constraints on private sector activities and the nature of its relationships with private sector operators. TIPS followed up by conducting workshops throughout the country with public and private sector participation to publicize, verify and provoke full and open discussion of the report's findings and recommendations. These workshops were followed by a 3-day National Conference on Commercial Policy and Legislation under the sponsorship of the MC&I Minister, the Chamber of Commerce, Industry and Agriculture (CCIA) and TIPS. During the Conference four task force groups developed specific reform proposals. At this point TIPS TC 1 and TC 2 collaborated closely, with draft legislation being prepared for three packets of laws. TIPS worked closely with the MC&I Minister in building understanding and support for the reforms among members of the Council of Ministers, resulting in the enactment of the laws without amendment. A TIPS consultant prepared a follow-up action plan for implementation of the reforms. TIPS is engaged in follow-up implementation actions and plans to work toward additional reforms proposed by the National Conference, plus additional ones identified in the action plan.

SUB-OUTPUT 1B 2: MINISTRY OF RURAL DEVELOPMENT AND AGRICULTURE (MRDA)

When work with MRDA began in January, TIPS and its counterparts quickly recognized that major policy decisions would not be possible until after the elections and a new government was formed. The Minister recognized this and disengaged from active MRDA policy direction and devoted his efforts to the electoral process (Also he had a UN agency job offer which he intended to accept after the elections). As a result, TIPS focussed on working with senior MRDA technicians and private sector representatives in an analysis of MRDA functions and identification of actions which could by undertaken during the year. A paper "Ways to Implement Agriculture Sector Strategy" (the Vias...paper) was prepared identifying policy areas for subsequent action. Consensus was reached that certain MRDA functions might be privatized. Actions were undertaken to build support for a policy favoring the shift of some services to the private sector. The areas selected for exploration were seeds production and dissemination, veterinary, soils and water, and some extension services. This included study tours to countries with successful privatization efforts, workshops and TIPS participation in a National Conference on Livestock at which broad themes of the government's role in agriculture and proposals for privatization were debated. Feasibility studies were developed concerning privatization of MRDA's soils and waters and veterinary functions. A report, "TIPS and Agriculture Development Strategy", was produced outlining next steps in policy reform. Much progress has been made in focussing senior MRDA technicians and some private sector representatives on strategic thinking concerning the directions of future agriculture sector policy. MRDA's senior technicians, together with TIPS have established a firm foundation for policy discussions after the new political level leadership of the Ministry is appointed. Next steps in the process are planned for November 1994.

SUB-OUTPUT 1B 3: INVESTMENT POLICY AND SUPPORT IMPROVED

During February and March 1994 TIPS began following up earlier work by a USAID-sponsored consultant who did a survey on investment constraints on private T&I and the role of the Office of Investment Support (GAI). GAI is located physically in the Ministry of Finance, but is under the direction of the Secretariat of Plans. TIPS conducted a preliminary analysis of GAI's training needs and TIPS/IPC consultants prepared a brief paper proposing a reorientation of GAI's role from monitoring and control to active support of potential investors and currently active private sector operators in their interaction with government agencies. The Director of GAI accepted the proposals and re-oriented GAI's efforts. Notable among its achievements were the key role it played in helping informal sector leaders establish an association of small businessmen (AGUIPEC)--informal sector operators--which has become in six months the largest and most active association in the country. Although TIPS has continued informal discussions and counseling of GAI on an on-going basis, further formal support and decisions concerning training of GAI staff have been deferred until November 1994 when GAI's status under a new government should is determined. Also in November, work on investment and fiscal policy will be started with the Ministry of Finance.

SUB-OUTPUT 4: MINISTRY OF FISHERIES

Phase one of policy work with the fisheries sector was conducted under TC 1, OUTPUT C in the form of a study and report on constraints which made recommendations concerning the development of Guinea Bissau's national fishing industry. Follow-up on that work began in September under TC 1B 4 to develop a fisheries sector action plan with proposals for far-reaching reforms of policy.

OUTPUT 1C: IDENTIFY AND ANALYZE CONSTRAINTS AND PRODUCE REPORTS AND WORKPLANS

Work under this OUTPUT included data base compilation, research on policy constraints and opportunities, participation in conferences and workshops sponsored by the GOGB and donors, and development of TIPS workplans.

SUB-OUTPUT 1C 1: DATA BASE IMPROVED

Initial data base work was done by preparing a computerized index of the 500-plus reference documents in the USAID library. This was followed by a detailed document subject matter review of the documents. This subject matter of these documents is more accessible to TIPS consultants and others. Some research work started under the IPC project, such at that on court cases in 1991/1992, was included herein. The data on court cases provides a base line for evaluating progress under TC 3.

TIPS conducted a study of current and past credit programs in Guinea Bissau, as lack of medium and long-term credit has been considered a key constraint on expansion of private T&I. A bibliography on credit was developed, current and past credit programs were identified and analyzed. Specifically their impact, problems and constraints encountered were documented. This is the beginning of

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a TIPS effort to develop an environment, including policies, propitious for the development of institutions which will provide medium and long-term credit to private sector operators and investors. The report, which was the first thorough study of credit in Bissau, was widely disseminated to Guinean public and private sector leaders and donor agencies. It will be followed by efforts to identify and develop policies to facilitate development of credit institutions.

SUB-OUTPUT 1C 2: RESEARCH AGENDA

Priorities for research and analysis work were identified during the year. These included a study on credit, and less formal preliminary investigations which led to activities already implemented under other Outputs of the workplan. Future work planned includes a study of the overall taxation system with the objective of identifying and eventually removing constraints on and providing incentives for private T&I expansion. Another planned study is of comparative port costs in Bissau and neighboring ports. This is an issue which should be brought to the attention of policy-makers as currently Bissau's port is not competitive with the ports of Dakar and Banjul. This is a constraint on fishing vessels bringing their catches to Bissau for processing, export and the domestic market. It also is one reason for high freight rates for sea transport from Bissau.

As part of its effort to gather information and coordinate activities with other donors, TIPS participated frequently in conferences and workshops sponsored by the GOGB and other donors. These included two seminars on artesanal fishing, a MC&I/ONUDI conference on "Strategic Policy and Methods of Privatization", a conference on seed privatization, and World Bank/IMF debriefing sessions. Activities of this kind assist in broadening TIPS understanding of current issues and provide additional means of influencing the outcome and recommendations of endeavors funded by other sources.

Currently, TIPS is preparing an overall report on constraints and opportunities relevant for all TIPS technical components.

SUB-OUTPUT 1C 3: IDENTIFY FISHERIES SECTOR POLICY CONSTRAINTS AND DEVELOP REFORM PROPOSALS

Initial work on fisheries was included under TC 1C because the first phase involved primarily research. Because of the sensitive policy issues and numerous vested interests involved, the initial discussions with the Fisheries Minister were conducted by TIPS PC rather than an outside consultant. Once agreement was reached and full cooperation assured, a well-known fisheries consultant was engaged to begin the research work. During two visits, he conducted a document review of fisheries policies, Guinea Bissau's bilateral fishing agreements, obtained data on catches and licensing, enforcement of fishing laws, obtained private sector views on constraints and produced a preliminary report on findings with recommendations for changes in licensing policies. This was discussed in a public/private sector roundtable. Follow up work will be conducted under TC 1 B-4.

SUB-OUTPUT 1C 4: WORKPLAN

Much effort during the year was focussed on the task of putting the various AEPs into a workplan format that satisfied both TIPS management needs and the project's contractual obligations to USAID. Three alternate versions were developed.

POLICIES AND IMPLEMENTATION STRATEGIES TC1

SUMMARY

EPs BY MONTH STATUS AS OF 30/1/94

Status as of 9/30/94

UT 1A - IMPROVE UNDERSTANDING AND ACCEPTANCE

B-OUTPUT 1A 1: Policy Maker's Understanding of Market Economics, Constraints and Opportunities Improved

Activity	Status	Date
1A 1-a. Schedule and implement briefings of leaders	Completed	Jan-94
1A 1-b. Interviews on radio, TV and the press	Started	Jan-94
1A 1-c. Prepare and deliver speeches	Started	Jan-94
1A 1-d. Develop and disseminate a "Handout" paper	To be started	Oct-94
1A 1-e. Design, prepare and disseminate newsletter	To be started	Oct-94
1A 1-f. Second phase of briefings for leaders	To be started	Oct-94
1A 1-g. IDLI course on trade and investment law	Completed	Feb-94
1A 1-h. IDLI seminar on "Enterprises in Difficulty"	Completed	Apr-94
1A 1-i. ILI seminar on implementing and monitoring privatization	To be started	Oct-94
1A 1-j. Enabling environment conference	To be started	Oct-94
1A 1-k. Produce report on enabling environment conference	To be started	Nov-94

UT 1B - DEVELOP AND IMPLEMENT POLICIES

UB-OUTPUT 1B 1: Ministry of Commerce and Industry - MC&I

Activity	Status	Date
1B 1-a. Develop proposals for policy change	Completed	Feb-94
1B 1-b. Conduct regional workshops to validate proposals	Completed	Feb-94
1B 1-c. Conduct national conference on C&I policies and laws	Completed	Mar-94
1B 1-d. Foment decisions on first set of policy changes	Completed	Apr-94

Sub-Totals

	Total	93-10	93-11	93-12	94-1	94-2	94-3	94-4	94-5	94-6	94-7	94-8	94-9	94-10	94-11	94-12
Started	8		1		5	1	1									
To be started	4													3	1	
Due	14				1	3	1	1						2	2	4
Completed	6				1	3	1	1								

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POLICIES AND IMPLEMENTATION STRATEGIES TC1

Activity	Status	Date
1B 1-e. Develop plan for implementation of decentralization policy	Completed	Jun-94
1B 1-f. Produce report on decentralization of MC&I services	Completed	Sep-94
1B 1-g. Evaluate impact and status of MC&I policy changes	To be started	Nov-94
1B 1-h. Identify next steps in MC&I reform	To be started	Nov-94
1B 1-i. Produce report on evaluation and next steps	To be started	Nov-94
1B 1-j. Conduct roundtable on MC&I policy change	To be started	Nov-94

JB-OUTPUT 1B-2: Ministry of Rural Development and Agriculture - MRDA

Activity	Status	Date
1B 2-a. Create MRDA working group, begin analysis MRDA functions	Completed	Feb-94
1B 2-b. Survey of current donor roles in seed production/dissemination	Completed	Apr-94
1B 2-c. Produce report on seed production/dissemination	Completed	Apr-94
1B 2-d. Establish priorities for MRDA reform, including privatization	Completed	May-94
1B 2-e. Produce report with recommendations on priorities.	Completed	Aug-94
1B 2-f. Agriculture policy strategic planning seminar	Completed	Mar-94
1B 2-g. Senegal/Mali study tour re privatization livestock services	Completed	Jun-94
1B 2-h. Sponsor regional meetings on privatization of livestock services	Completed	Jun-94
1B 2-i. Co-sponsorship of national livestock policy conference	Completed	Jun-94
1B 2-j. Conduct feasibility studies on privatization of two MRDA functions	Completed	Aug-94
1B 2-k. Produce report on progress in reform areas identified in "Vias" paper, with	Completed	Aug-94
recommendations for next steps	Completed	Aug-94
1B 2-m. Study tour to Senegal and Burkina-Faso to observe rural extension experience.	To be started	Sep-94
1B 2-n. Participate in INPA-Sponsored seminar on privatization of seed industry.	To be started	Sep-94

Sub-Totals

	Total	93-10	93-11	93-12	94-1	94-2	94-3	94-4	94-5	94-6	94-7	94-8	94-9	94-10	94-11	94-12
Started	13				1		1		5		4		2			
To be started	4														4	
Due	20					1	1	2	1	4		4	1	2		4
Completed	16					1	1	2	1	4		4	1	2		

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POLICIES AND IMPLEMENTATION STRATEGIES TC1

Activity	Status	Date
1B 2-o. Begin dialogue with new *MRDA policy level officials*	To be started	Oct-94
1B 2-p. Hold regional workshops on government/private sector roles in agriculture, proposals for next steps, including privatization.	To be started	Oct-94
1B 2-q. Develop recommendations for hierarchy of MRDA policy and organization priorities.	To be started	Nov-94
1B 2-r. Hold roundtable, including private sector, donor, and MRDA representatives.	To be started	Nov-94
1B 2-s. Produce report on progress and next steps.	To be started	Nov-94
1B 2-t. Seek policy decisions and policy statement from MRDA	To be started	95
1B 2-u. Produce action plan to implement policy reforms.	*To be started*	95
B-OUTPUT 1B 3: Investment Policy and Support and Improved		
1B 3-a Analyze GAI's current role and training needs	Completed	Mar-94
1B 3-b. Explore feasibility/desirability of strengthening GAI	Completed	Apr-94
1B 3-c. Evaluate GAI's progress and post-election role	To be started	Nov-94
1B 3-d. Identify policy/legal constraints on private T&I	To be started	Nov-94
1B 3-e. Conduct roundtable on *GAI role and constraints*	To be started	Nov-94
1B 3-f. Produce report on results of work (c.d.e.)	To be started	Nov-94
1B 3-g Begin dialogue with post-election minister of finance	To be started	Oct-94
1B 3-h. Identify Min. Finance policy areas for reform and produce report	To be started	Nov-94
1B 3-e. Analyze GOGB code for foreign investment	To be started	95
1B 3-f. Produce report with proposals for revising code	To be started	95
1B 3-g. Hold roundtable on investment code and proposals	To be started	95
1B 3-h. Seek policy decision for revision of code	To be started	95
B-OUTPUT 1B 4. Ministry of Fisheries		
1B 4-a. Assist fisheries ministry develop action plan, including coastal zone management	To be started	Oct-94
1B 4-b. Conduct workshop/training concerning policy change fisheries management	To be started	Oct-94
1B 4-c. Assist fisheries ministry prepare policy/legislative proposals	To be started	Oct-94
1B 4-d. Hold roundtable with GOGB, private sector, and donors representatives	To be started	Nov-94
1B 4-e. Produce report	To be started	Nov-94
1B 4-f. Develop political support for policy/legislative reforms	To be started	Nov-94

Sub-Totals

	Total	93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
Started	1						1									
To be started	17													6	11	
Due	19						1	1							1	16
Completed	2						1	1								

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POLICIES AND IMPLEMENTATION STRATEGIES TC1

1C: IDENTIFY AND ANALYZE CONSTRAINTS AND PRODUCE REPORTS AND WORK PLANS

Activity	Status	Date
-OUTPUT 1C 1: Database Improved		
1C 1-a. Establish computerized document reference system	Completed	Jan-94
1C 1-b. Identify key information references and perform USAID library review	Completed	Jan-94
1C 1-c. Research on court cases 1991-92	Completed	Apr-94
1C 1-d. Produce report on court cases	Completed	Jul-94
1C 1-e. Study of impact of credit on investment	Completed	Jun-94
1C 1-f. Distribution of credit report	Completed	Jul-94
1C 1-g. Workshop on credit report	Completed	Jun-94
-OUTPUT 1C 2: Research Agenda		
1C 2-a. Identify investment constraints & analyze GAI role	Completed	Dec-93
1C 2-b. Conduct roundtable on investment constraints	Completed	Dec-93
1C 2-c. Produce report	Completed	Feb-94
1C 2-d. Produce a study of tax system	To be started	95
1C 2-e. Conduct a workshop on tax system	To be started	95
1C 2-f. Produce an action plan for reform of tax system	To be started	95
1C 2-g. Conduct study of comparative port costs in Bissau, Banjul, and Dakar.	To be started	95
1C 2-h. Conduct workshop on port costs and constraints	To be started	95
1C 2-i. Produce study with recommendation concerning port	To be started	95
1C 2-j Produce report on policy constraints and opportunities	Started	Sep-94

Sub-Totals

		93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
Started	10	6						3					1			
To be started	0															
Due	11			2	2	1		1		2	2			1		
Completed	10			2	2	1		1		2	2					

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POLICIES AND IMPLEMENTATION STRATEGIES TC1

-OUTPUT IC 3: Identify Fisheries Sector Policy Constraints and Develop Reform Proposals

IC 3-a. Consult with fisheries minister, obtain agreement for TIPS work on fisheries policy	Completed	Apr-94
IC 3-b. Identify candidates for fisheries working group	Completed	Apr-94
IC 3-c. Identify STX fisheries sector consultant	Completed	Apr-94
IC 3-d. Conduct document review of fisheries policies, international agreements, sector constraints and opportunities	Completed	Jun-94
IC 3-e. Obtain and analyze data on catches and licensing	Completed	Jun-94
IC 3-f. Identify existing domestic and foreign fishing activities	Completed	Jun-94
IC 3-g. Obtain private and public sector views on constraints	Completed	Jun-94
IC 3-h. Produce preliminary data and analysis paper	Completed	Jun-94
IC 3-i. Conduct data verification roundtable on industrial and artesanal fisheries	Completed	Jun-94
IC 3-j. Analysis of fisheries sector constraints and opportunities completed	Completed	Aug-94
IC 3-k. Produce report with recommendations for reforms	Completed	Sep-94
IC 3-l. Conduct roundtable on draft report	Completed	Aug-94

Sub-Totals

		93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
Started	12					3			6		2	1				
To be started	0															
Due	12							3		6		2	1			
Completed	12							3		6		2	1			

10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
93			94											

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POLICIES AND IMPLEMENTATION STRATEGIES TC1

-OUTPUT 1C 4: Workplan

	Status	Date	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
			93			94											
1C 4-a. Prepare and produce 10/93 to 09/94 "Work Plan"(first).	Completed	Oct-93															
1C 4-b. Produce 10/93 to 12/94 "Work Plan "(second)	Completed	Sep-94															
1C 4-c. Produce 10/94 to 04/96 " work plan " (third)	Started	Sep-94															

Sub-Totals

	Total	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Started	2						1						1			
To be started	0															
Due	3	1											1	1		
Completed	2	1											1			

TOTALS

	Total	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Started	46	6	1	0	6	4	4	3	11	0	6	1	4	0	0	0
To be started	25	0	0	0	0	0	0	0	0	0	0	0	0	9	16	0
Due	79	1	0	2	3	5	3	8	1	12	2	6	3	6	3	24
Completed	48	1	0	2	3	5	3	8	1	12	2	6	3	2	0	0
		93			94											

TRADE AND INVESTMENT POLICIES - TC 1

JMMARIES

CHNICAL INPUTS

	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12	Total Allocation Days
ERM EXPATRIATE (LTX)																
1 POL	19.00	4.79	5.79	8.70	14.04	16.62	13.95	15.87	15.87	13.87	13.87	23.79	25.17	16.17	10.17	217.67
2 LEG	4.00					4.21	4.21	2.21	3.21	1.71	2.71	5.21	5.00	4.50	3.00	40.00
3 PVT	4.00					0.57	1.90	1.90	2.90	0.57	1.57	4.07	6.50	2.50	4.50	31.00
al 3	27.00	4.79	5.79	8.70	14.04	21.41	20.07	19.99	21.99	16.16	18.16	33.07	36.67	23.17	17.67	288.67
ERM LOCAL (LTL)																
1 ECO							7.11	2.31	7.31	5.31	5.31	8.48	23.28	19.78	15.11	94.00
2 L&J								0.80	0.80	0.80	0.80	4.30	3.50	2.50	2.50	16.00
3 AGB						0.57	0.57	0.57	0.57	0.57	0.57	4.07	3.50	1.50	1.50	14.00
4 AGE						0.57	0.57	0.57	0.57	0.57	0.57	4.07	3.50	1.50	1.50	14.00
5 TRN						2.00	2.00		3.00	2.00		3.50	15.50	12.00	1.00	41.00
ıtal 5	0.00	0.00	0.00	0.00	0.00	3.14	10.25	4.25	12.25	9.25	7.25	24.42	49.28	37.28	21.61	179.00
	10 93	11	12	1 94	2	3	4	5	6	7	8	9	10	11	12	

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TRADE AND INVESTMENT POLICIES - TC 1

		93			94												Total Allocation
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	Days
TERM EXPATRIATE (STX)																	
1	Aquino							10.00	10.00	10.00							30.00
2	Cochat	7.50	7.50														15.00
3	Fluharty1													9.00	9.00		18.00
4	Garcia1				6.00	6.00											12.00
5	Garcia2					7.00	7.00										
6	Garcia3								7.00	7.00							
7	Garcia4														12.00	12.00	
8	Garcia5																
9	Gustafson1+2				16.00	16.00											32.00
10	Gustafson2						2.00										
11	J. Ellis	14.00															14.00
12	Kaczynski1								7.50	7.50							
13	Kaczynski2										9.00	9.00					
14	Kaczynski3													9.00	9.00		18.00
15	Leifert	4.00															4.00
16	Lippold		9.00	9.00													18.00
17	Monnerat1										9.00	9.00					18.00
18	Monnerat2														9.00	9.00	
19	Monnerat3																
20	Nasatir		9.00	9.00													18.00
21	Noble						2.00	3.00		1.00		1.00					7.00
22	Panagides1+2				10.67	10.67	10.67										32.00
23	Panagides3							2.00									
24	Panagides4										9.00	9.00					
25	Panagides5														9.00	9.00	
26	Panagides6																
27	T. Leifert	14.00															14.00
28	TBD														18.00	18.00	36.00
29	TRN					4.00		1.67	1.67	1.67							9.00
tal	29	39.50	25.50	18.00	32.67	43.67	21.67	16.67	26.17	27.17	27.00	28.00	0.00	18.00	66.00	48.00	295.00
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	
		93			94												

TRADE AND INVESTMENT POLICIES - TC 1

		93			94												Total Allocation
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	Days
ERM LOCALS (STL)																	
1	A. Barbosa		14.67	14.67	14.67												44.00
2	A. Mané				6.00	13.00	7.00		5.00	5.00					4.50	4.50	45.00
3	Albino							10.00	10.00								20.00
4	Djassi								4.00	4.00					4.00	4.00	16.00
5	Fonseca										9.00	9.00	9.00	9.00			36.00
6	Jamanca	4.00															4.00
7	J. Barbosa		17.50	17.50													35.00
8	Kassimo									5.00							5.00
9	M. Barroso		12.50	12.50													25.00
10	M. Embaló				6.00	13.00	7.00		5.00	5.00					4.50	4.50	45.00
11	M. Ribeiro				6.00	13.00	7.00		5.00	5.00					4.50	4.50	45.00
12	P.Sanhá	11.00	11.00	11.00	11.00												44.00
13	R. Fonseca					6.00	6.00		8.00								20.00
14	R. So					6.00	6.00		8.00								20.00
15	Santos									5.00							5.00
16	So									9.00	9.00			9.00	9.00		36.00
17	Turpin									5.00							5.00
18	Vieira									5.00							
19	TBD														10.00	10.00	20.00
al 19		15.00	55.67	55.67	43.67	51.00	33.00	10.00	45.00	48.00	18.00	9.00	9.00	18.00	36.50	27.50	470.00
56		81.50	85.95	79.45	85.04	108.70	79.22	56.99	95.41	109.41	70.41	62.41	66.49	121.95	162.95	114.78	1232.67

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IV. SUMMARY

C. TRAINING

Status	#	TRAINING AEP	CODE	Type	Training	Trainees	Starts	Where	Estimated Cost ($)	Respons
	1	1A 1-j.	TR-L	Conf.	3	110	Nov-94	GB/B		LAI
	2	1B 2-i.	TR-L	Conference	5	80	Jun-94	GB-B		LAI
	3	1B 1-b.	TR-L	workshop	5	70	Feb-94	GB-I		IPC
	4	1B 1-c.	TR-L	Conf.	4	200/24	Mar-94	GB-B		IPC
	5	1B 1-J.	TR-L	S-T	1	30	Nov-94	GB-B		LAI
	6	1B 2-h.	TR-L	workshop	5	40	May-94	GB-I		IPC
	7	1B 2-p.	TR-L	workshop	2	60	Oct-94	GB-I		AFC
	8	1B 2-r.	TR-L	Con/Table	3	80	Nov-94	GB-B		AFC
	9	1B 4-b	TR-L	Workshop	5	15	Nov-94	GB-B		AFC
	10	1B 4-d	TR-L	rd-table	1	40	Nov-94	GB-B		AFC
	11	1C 1-g.	TR-L	workshop	1	24	Jun-94	GB-B		AFC
	12	1C 2-b.	TR-L	workshop	1	55	Nov-93	GB-B		USAID
	13	1C 2-e.	TR-L	workshop	1	100	Jun-05	GB-B		AFC
	14	1C 2-h.	TR-L	workshop	1	40	Dec-94	GB-B		AFC
	15	1C 3-i.	TR-L	workshop	1	25	Jun-94	GB-B		TIPS
Sub-Totals	15				39	969/24			$0	
	1	1A 1-g.	TR-OS	Course	30	3	Jan-94	Italy		HRDA
	2	1A 1-h.	TR-OS	Seminar	20	4	Apr-94	Italy		HRDA
	3	1A 1-i.	TR-OS	Course	11	3	Nov-94	US		HRDA
	4	1B 2-f.	TR-OS	Seminar	5	3	Jan-94	Ivory Coast		HRDA
	5	1B 2-g.	TR-OS	Study Tour	10	4	Apr-94	Sengl/Mali		HRDA/LAI
	6	1B 2-m.	TR-OS	S-T	12	3	Oct-94	Sngl/B.Faso		LAI
Sub-Totals	6				88	20			$0	
Total	21				127	989/24			$0	

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TIPS

WORK PLAN STATUS REPORT

TECHNICAL COMPONENT - 2

TRADE AND INVESTMENT STATUTES AND REGULATIONS

PERIOD

10/1/93 TO 12/31/94

TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

SUMMARY: OUTPUTS & SUB-OUTPUTS

OUTPUT 2A - T&I STATUTES , REGULATIONS AND PROCEDURES DRAFTED

- SUB-OUTPUT 2A 1 - T&I Statutes
- SUB-OUTPUT 2A 2 - Commercial Laws
- SUB-OUTPUT 2A 3 - Code for Commercial Societies
- SUB-OUTPUT 2A 4 - Guinea-Bissau's Legislation

OUTPUT 2B - EXECUTIVE AND LEGISLATIVE DRAFT AND CODIFICATION

- SUB-OUTPUT 2B1 - Ministry of Justice Strengthened
- SUB-OUTPUT 2B 2 - People's National Assembly Strengthened

OUTPUT 2C - LAWS, REGULATIONS AND PROCEDURES DISSEMINATED

- SUB-OUTPUT 2C1 - Legislation Information Disseminated
- SUB-OUTPUT 2C 2 - Traditional Law Integration
- SUB-OUTPUT 2C 3 - Land Tenure Law
- SUB-OUTPUT 2C 4 - Legislation Reforms Disseminated

OUTPUT 2D- MONITORING AND OVERSEEING ADOPTION OF LAWS

- SUB-OUTPUT 2D 1 - Public Policy Formulation
- SUB-OUTPUT 2D 2 - Enacting Laws Process

TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

ANNUAL REPORT: OUTPUTS & SUB-OUTPUTS & AEP

OUTPUT 2A - T&I STATUTES, REGULATIONS AND PROCEDURES DRAFTED

Specific trade and investment statutes, regulations and procedures are being surveyed, catalogued, examined for possible changes, drafted or redrafted, codified and formally adopted.

SUB-OUTPUT 2A 1 - T&I STATUTES

Survey of Existing Laws

TIPS conducted a survey with GELD to identify and catalogue existing laws affecting critical growth sub-sectors. A situation report was produced (DONE).

Prioritize Changes in T&I Laws

TIPS produced a reference directory of T&I laws by area, and produced a list of constraints and conflicts in T&I laws (DONE).

SUB-OUTPUT 2A 2 - COMMERCIAL LAWS

Propose Changes in Commercial Laws I

TIPS surveyed needs for changes in Commercial Laws relating to MCI and conducted regional meetings to analyze constraints. TIPS conducted a National Conference to discuss and produce list of proposed changes. Approximately 800 individuals participated in regional meetings. The National Conference on Commercial Laws was attended by 190 people (including 40 women) over a three-day period. Speakers came from Portugal and Bissau, and discussed the historical evolution of Commercial Legislation in Guinea-Bissau, and GB's Commercial Societies legislation, among other issues (DONE).

New Commercial Laws I

In conjunction with a local working group, TIPS analyzed the recommendations of National Conference, selected priority legislation of the Ministry of Commerce and Industry to be changed, and produced and submitted draft bills to Ministry of Commerce and Industry. As a result, three new laws were approved by Government, changing laws on access to commercial activity; commercial establishments and pricing systems. (DONE)

New Regulations

TIPS conducted, with the working group, a review of draft bills on Instructions and Model Forms needed for the implementation of laws on Licensing of Trade Unities and Access to Trade Activity, and submitted drafts to the Minister of Commerce and Industry (DONE).

Propose Changes in Commercial Laws II

TIPS conducted meetings with the directors of Ministry of Commerce and Industry, Ministry of Justice, Ministry of Health and Ministry of Agriculture, to collect information to the draft Terms of Reference for drafting bills for laws covering Commercial Inspection, Economic Crimes, Public Health Infractions, and System Against Ordenance (DONE).

New Commercial Laws II

TIPS is producing and will submit to the Minister of Commerce and Industry (with a working group of the Ministries of Justice, Commerce and Industry, Finance, Health, Agriculture and Ministério Público) new laws on Commercial Inspection, Economic Crimes, Public Health Infractions, and System Against Ordenance (IN PROGRESS).

Dissemination of New Laws

TIPS is working on, and will disseminate, through TV, Radio and Media conferences, debates and interviews, with government and private sector representatives on new commercial laws and procedures concerning Commercial Inspection, Economic Crimes, Public Health Infractions and System Against Ordenance follow its approval (IN PROGRESS).

SUB-OUTPUT 2A 3 - CODE FOR COMMERCIAL SOCIETIES

Code for Commercial Societies

TIPS will conduct meetings with the Ministry of Justice to explore the needs for developing a Commercial Societies Code. Based on those meetings, TIPS will produce a study and prepare terms of reference for a Code of Commercial Societies, then design and conduct a workshop on the Code and will produce a list of proposed changes (TO BE DONE/95).

SUB-OUTPUT 2A 4 - GUINEA-BISSAU'S LEGISLATION

Research Existing Systems of Computerized Data Base

TIPS analyzed the existing Tolentino computerized reference system of legislation, conducted a study tour to Brazilian National Congress and visited private enterprises to see other available software and systems of computerized indexation and jurisprudence. Report on findings produced (DONE).

Data Base System for RGB Legislation

TIPS will select, based on the results of the study tour, appropriate software for a legislative data base, determine an appropriate system of indexation and procure appropriate hardware and software for installation. (TO BE DONE/94).

Trained Personnel on Indexation of Laws

TIPS will select and train appropriate staff of People's National Assembly, Ministry of Justice (GELD), Supreme Court of Justice, OAGB, in the indexation of law. (TO BE DONE/94)

OUTPUT 2B - EXECUTIVE AND LEGISLATIVE DRAFT AND CODIFICATION

Executive and legislative entities involved in drafting and codification are being prepared to sustain these tasks themselves after the project ends. Executive and legislative organs are receiving a minimum level of material support to function effectively.

SUB-OUTPUT 2B 1 - MINISTRY OF JUSTICE STRENGTHENED

Identify Ministry of Justice Material Needs

TIPS conducted meetings with officers of Ministry of Justice in order to identify material needs. A report was produced from which priorities will be defined for procurement. (IN PROGRESS)

SUB-OUTPUT 2B 2 - PEOPLE'S NATIONAL ASSEMBLY STRENGTHENED

Identify Legislative Needs

TIPS is working on meetings with People's National Assembly members and staff, in order to survey and identify priorities of training and material needs. Procurement plan will be produced (IN PROGRESS).

Support Legislative Strengthening

TIPS will design and execute a training plan on legislative bill drafting and on legislative administration and operation, in order to support strengthening of the People's National Assembly (TO BE DONE/94).

Legislative Process, Structure and Operation Learning

TIPS will organize and execute a three-week study tour of up to 10 key members of the new PNA, Executive Branch and Private Sector to learn basics of the legislative institution. The tour will include orientation at SUNY-Albany (based on the successful 1992 Brazilian Program) and travel to other relevant U.S. sites to better understand legislative structures and operations. (TO BE DONE/94)

OUTPUT 2C - LAWS, REGULATIONS AND PROCEDURES DISSEMINATED

Newly promulgated laws, regulations and procedures are being made clear and consistent, and are being widely disseminated.

SUB-OUTPUT 2C 1 - LEGISLATION INFORMATION DISSEMINATED

Communication with Constituents

TIPS is conducting meetings with legislative members to set up communication workshops that will enable them to better communicate with their constituents in order to gain support and wide acceptance of new T&I related laws. Further workshops will be planned and conducted as a result of these meetings. (IN PROGRESS)

Dissemination of Information on New Laws

TIPS is conducting meetings with "media" experts to discuss guidelines on how to disseminate information to the public in general, and in particular to *tabanca* residents, , on proposed draft laws and newly enacted legislation. Report will be produced (IN PROGRESS).

SUB-OUTPUT 2C 2 - TRADITIONAL LAW INTEGRATION

Traditional Law Integration

TIPS will conduct meetings with People's National Assembly, OAGB, members of the Judiciary and other Guinean institutions to discuss methods and approaches for disseminating information and obtaining feedback to achieve widespread understanding and acceptance by the traditional sector of the relevant aspects of the modern regulatory scheme. Report will be produced (TO BE DONE/94).

SUB-OUTPUT 2C 3 - LAND TENURE LAW

Conference on Land Tenure Law

TIPS will continue work on the draft land tenure law with existing working groups, including government officials and private sector participants, plus appropriate members of the newly-elected People's National Assembly. Issues and conflicting interests will be identified and discussed so that a strategy for enactment of the law can be developed, and public conferences held on these matters. As a preliminary approach of this activity, TIPS conducted a seminar on Land Tenure Law and Traditional Law, during two (2) days, with participation of approximately twenty technical people (6 women) (IN PROGRESS).

SUB-OUTPUT 2C 4 - LEGISLATION REFORM DISSEMINATED

Legal Reforms Dissemination

TIPS will support, with the Law School, the 3rd. Jornadas Jurídicas on Legal Reforms on Penal Law, Fiscal Law and Administrative Law (POSTPONED).

Seminar on "Enterprise Tax Policy"

TIPS will support, with the Ministry of Finance (Public Revenue Service), a seminar on "Enterprise Tax Policy", with participation of public and private sector representatives and produce recommendations on needs for legal changes (POSTPONED).

OUTPUT 2D - MONITORING AND OVERSEEING ADOPTION OF LAWS

Systems and approaches for monitoring and overseeing adoption of new laws are being put into place.

SUB-OUTPUT 2D 1 - PUBLIC POLICY FORMULATION

Public Policy

TIPS will work with the People's National Assembly to design and maintain a system for monitoring and overseeing the adoption of new laws. TIPS will also design and conduct a seminar for new members of the People's National Assembly, upper level staff of the Ministries and representatives of the private sector regarding analysis and formulation of public policy concerning T&I issues (TO BE DONE/94).

SUB-OUTPUT 2D 2 - LEGISLATIVE PROCESS

Legislative Process

TIPS will conduct a seminar on "how a bill becomes a law" with People's National Assembly, government entities and private sector representatives to present bill tracking techniques, i.e., "how-to" follow a bill, "how-to" present amendments to a proposed bill, and "how-to" achieve formal passage and ensure adoption of a bill (TO BE DONE/95)

TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

SUMMARY

EPs BY MONTH - STATUS AS OF 9/30/94

Status as of 9/30/94

IT 2A - T&I STATUTES, REGULATIONS AND PROCEDURES DRAFTED

B-OUTPUT 2A 1 - T&I Statutes

Item	Status as of 9/30/94	
2A 1-a. Survey of existing laws	Completed	May-94
2A 1-b. Catalogue of work accomplished	Completed	May-94
2A 1-c. Catalogue of statutes for situation report	Completed	May-94
2A 1-d. Produce a situation report	Completed	May-94
2A 1-e. Produce referenced directory of T&I laws	Completed	Jul-94
2A 1-f. Produce list of constraints and conflicts in T&I laws	Completed	Jul-94
2A 1-g. Prioritize needs for changes in current laws	Completed	Jul-94

B-OUTPUT 2A 2 - Commercial Laws

Item	Status as of 9/30/94	
2A 2-a. Survey needs for changes in commercial laws	Completed	Mar-94
2A 2-b. Hold regional conferences	Completed	Mar-94
2A 2-c. Hold national conference	Completed	Mar-94
2A 2-d. Produce list of proposed changes	Completed	Mar-94
2A 2-e. Produce analysis on the recommendations of national conference	Completed	May-94
2A 2-f. Select priority legislation for changes	Completed	May-94
2A 2-g. Produce and submit draft bills to Ministry of Commerce and Industry	Completed	May-94

Sub-Totals

	Total	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12
Started	12		1		1	1	2	4		3						
To be started	0															
Due	14						4		7		3					
Completed	14						4		7		3					

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TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

Activity	Status	Date
2A 2-h. Produce draft bills, instructions and model Forms needed to implement approved laws	Completed	Jun-94
2A 2-i. Submit final draft bill to Ministry of Commerce and Industry	Completed	Jun-94
2A 2-j. Hold meetings (with Ministries of Commerce and Industry, Justice, Health and Agriculture) to collect information for terms of reference for new laws on commercial activity	Completed	Jul-94
2A 2-k. Produce draft of terms of reference for laws covering commercial inspection, economic crimes and public health infractions and system against ordenance	Completed	Jul-94
2A 2-l. Produce draft bills on commercial inspection	To be started	Sep-94
2A 2-m. Produce draft bills on economic crimes and public health infractions	To be started	Sep-94
2A 2-n. Produce draft bills on system against ordenance	To be started	Sep-94
2A 2-o. Dissemination of laws passed on the TV	To be started	Jul-94
2A 2-p. Dissemination of laws passed on the Radio	To be started	Jul-94
2A 2-q. Dissemination of laws passed in the Newspaper	To be started	Jul-94

SUB-OUTPUT 2A 3 - Code for Commercial Societies

Activity	Status	Date
2A 3-a. Produce a study on commercial societies code	To be started	95
2A 3-b. Design and conduct a workshop on commercial societies code	To be started	95
2A 3-c. Produce list of proposed changes	To be started	95

Sub-Totals

	Total	93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
Started	5									2	3					
To be started	0															
Due	8									2				3		3
Completed	4									2	2					

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TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

--OUTPUT 2A 4 - Guinea-Bissau's Legislation

Activity	Status	Date
2A 4-a. Conduct a study tour to Brazilian National Congress on legislation data base	Completed	May-94
2A 4-b. Conduct visits to private entreprises in Brazil, on legislative data base	Completed	May-94
2A 4-c. Produce report on findings	Completed	May-94
2A 4-d. Produce proposal for data base system of legislation	To be started	Sep-94
2A 4-e. Determine system of indexation	To be started	Oct-94
2A 4-f. Establish data base system	To be started	Nov-94
2A 4-g. Select trainees for indexation of laws course	To be started	Nov-94
2A 4-h. Train personnel on indexation of laws	To be started	Nov-94

JT 2B - EXECUTIVE AND LEGISLATIVE DRAFT AND CODIFICATION

B-OUTPUT 2B1 - Ministry of Justice Strengthened

Activity	Status	Date
2B 1-a. Survey material needs	Completed	Jul-94
2B 1-b. Identify priorities	To be started	Sep-94
2B 1-c. Produce procurement plan	To be started	Oct-94

JB-OUTPUT 2B 2 - People's National Assembly Strengthened

Activity	Status	Date
2B 2-a. Survey training needs	To be started	Sep-94
2B 2-b. Survey material needs	To be started	Sep-94
2B 2-c. Identify priorities	To be started	Oct-94
2B 2-d. Produce procurement plan	To be started	Nov-94

Sub-Totals

	Total	93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
Started	5							1					4			
To be started	6													2	4	
Due	15								3		1			2		9
Completed	4								3		1					

TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

		93			94											
Activity	Status	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
2B 2-e. Produce plan and execute training in legislative bills draft	To be started Oct-94															
2B 2-f. Produce plan and execute training in legislative administration and operation	To be started Oct-94															
2B 2-g. Conduct a study tour on administration and operation of legislative institution	To be started Oct-94															

UT 2C - LAWS, REGULATIONS AND PROCEDURES DISSEMINATED

UB-OUTPUT 2C1 - Legislation Information Disseminated

2C 1-a. Produce plan for communication workshops on new laws	To be started Oct-94															
2C 1-b. Schedule communication workshops on new laws	To be started Oct-94															
2C 1-c. Conduct communication workshop on new laws	To be started Oct-94															
2C 1-d. Design guideline manual for dissemination of information on new laws	To be started Sep-94															

UB-OUTPUT 2C 2 - Traditional Law Integration

2C 2-a. Produce report on methods for dissemination of information	To be started Oct-94															

UB-OUTPUT 2C 3 - Land Tenure Law

2C 3-a. Produce a list of identified conflicting interest and issues of land tenure law	To be started Sep-94															
2C 3-b. Design and conduct regional conference on land tenure law	To be started Oct-94															

Sub-Totals

		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Started	2												2			
To be started	9													9		
Due	11														7	4
Completed	0															
		93			94											

TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

			93			94											
B-OUTPUT 2C 4 - Legislation Reforms Disseminated			10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
2C 4-a. National Conference on legal reforms	To be started	Sep-94															
2C 4-b. Conduct seminar on "Entreprise Tax Policy"	To be started	Sep-94															
2C 4-c. Produce recommendations on "Entreprise Tax Policy"	To be started	Oct-94															
IT 2D- MONITORING AND OVERSEEING ADOPTION OF LAWS																	
B-OUTPUT 2D 1 - Public Policy Formulation																	
2D 1-a. Design and conduct a seminar on analysis and formulation of public policy	To be started	Nov-94															
B-OUTPUT 2D 2 - Enacting Laws Process																	
2D 2-a. Design and conduct a seminar on "How a bill becomes a law"	To be started	95															
Sub-Totals																	
	Started	2												2			
	To be started	1														1	
	Due	4													3		1
	Completed	0															
TOTALS																	
	Started	26	0	1	0	1	1	2	5	0	5	3	0	8	0	0	0
	To be started	16	0	0	0	0	0	0	0	0	0	0	0	0	11	5	0
	Due	52	0	0	0	0	0	4	0	10	2	4	0	0	8	7	17
	Completed	22	0	0	0	0	0	4	0	10	2	6	0	0	0	0	0
			10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
			93			94											

TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

MMARIES

·NICAL INPUTS

		93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12	Total Allocations Days
RM EXPATRIATE - (LTX)																	
1	POL				1.67	1.67	2.67	0.50	0.50	2.00	2.00		6.25	4.08	2.58	1.08	25.00
2	LEG					5.00	7.00	3.50	3.50	3.50	5.50	2.00	12.00	22.67	17.67	5.67	88.00
3	PVT						6.00			2.00	1.00		3.50	2.50	1.50	0.50	17.00
3		0.00	0.00	0.00	1.67	6.67	15.67	4.00	4.00	7.50	8.50	2.00	21.75	29.25	21.75	7.25	130.00
RM LOCAL - (LTL)																	
1	L&J						7.00	9.50	9.50	4.50	6.50	2.00	12.75	16.92	13.42	6.92	89.00
2	TRN								1.00					5.33	8.00	6.33	20.67
3	JAMANCA								15.00				11.25	11.25	11.25	11.25	60.00
3		0.00	0.00	0.00	0.00	0.00	7.00	9.50	25.50	4.50	6.50	2.00	24.00	33.50	32.67	24.50	169.67
RM EXPATRIATE - (STX)																	
1	LEG/ADM														11.50	11.50	23.00
2	LEGAL												6.00	47.00	29.50	11.50	94.00
3	LEGAL/INDEX														6.00	6.00	12.00
4	LEGAL/JORN												4.00	15.50	15.50		35.00
5	NOBLE								1.00								1.00
6	POL														6.00	6.00	12.00
7	POL/LEGAL													18.00			18.00
8	POL/SOC																0.00
9	SOBRAL1						18.00										18.00
10	SOBRAL2								18.00								18.00
11	SOBRAL3									12.00	6.00						18.00
12	SOBRAL4												12.00	12.00			24.00
13	TRN					2.50	2.50										5.00
14	WALDWIN								15.00								15.00
14		0.00	0.00	0.00	0.00	2.50	20.50	0.00	34.00	12.00	6.00	0.00	22.00	92.50	68.50	35.00	293.00
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	
		93			94												

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TRADE AND INVESTMENT STATUTES AND REGULATIONS - TC 2

		93			94												Total Allocations
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	Days
ERM LOCAL - (STL)																	
1	COMP												11.25	11.25	11.25	11.25	45.00
2	MCI					15.00	15.00		24.00	9.00	18.00		12.00	12.00			105.00
3	CCIA					7.50	7.50		4.00								19.00
4	INDEX												11.25	11.25	23.25	11.25	57.00
5	JOURN										6.00	6.00	6.00	6.00	6.00	6.00	36.00
6	LEGAL										1.50	1.50	6.00	1.00			10.00
7	LEGAL/JORN												4.00	15.50			19.50
8	MA												3.00	3.00			6.00
9	MF												3.00	3.00			6.00
10	MH												3.00	3.00			6.00
11	MP												3.00	3.00			6.00
12	PROCEL		26.67	26.67	26.67	29.17	41.17	26.67	12.00	15.00	7.50	1.50	16.25	36.00	39.00	23.50	327.75
13	ROGÉRIO								12.00								12.00
14	TOLENTINO								15.00				11.25	11.25	11.25	11.25	60.00
l	14	0.00	26.67	26.67	26.67	51.67	63.67	26.67	67.00	24.00	33.00	9.00	90.00	116.25	90.75	63.25	715.25
al:		0.00	26.67	26.67	30.00	70.00	150.00	63.67	194.00	72.00	75.00	17.00	225.50	426.75	336.58	196.75	1900.58

TRADE AND INVESTMENT STATUTES AND REGULATION - TC 2

IV. SUMMARY

D. COMMODITIES

Status	#	COMMODITIES AEP	CODE	Items	Units	For	Required	Total Cost	Respons
	1	2A 4de	COM	computer	2		Jul-94	$10,000.00	LAI
	2	2A 4de	COM	software	2		Jul-94	$2,000.00	LAI
Total:	2				4			$12,000.00	

TRADE AND INVESTMENT STATUTES AND REGULATION - TC 2

IV. SUMMARY

C. TRAINING

Status	#	TRAINING AEP	CODE	Type	Training days	Trainees/ women	Starts	Where	Estimated Cost ($)	Respons
Completed	1	2A 2-b	TR-L	Con/Table	14	400		GB-I		LAI
Completed	2	2A 2-c	TR-L	Con/Table	3	190/40		GB-B		LAI
Completed	3	2A 3b	TR-L	workshop	2	30	95	GB-B	$1,500	LAI
Completed	4	2A 4h	TR-L	course	12	10/5	Jan-00	GB-B	$2,000	LAI
Completed	5	2B 2e	TR-L	Course	10	20	Oct-94	GB-B	$3,000	LAI
	6	2B 2f	TR-L	Course	5	20	Oct-94	GB-B	$1,500	LAI
	7	2C 1c	TR-L	workshop	6	20	Nov-94	GB-B	$1,500	LAI
	8	2C 4-b	TR-L	SEM/CONF	2	150	Oct-94	GB-B	$3,000	LAI
	9	2D 1a	TR-L	SEM	12	25/5	Sep-94	GB-B	$3,000	LAI
	10	2D 2a	TR-L	SEM	12	25/5	1995	GB-B	$3,000	LAI
Sub-Totals	10				78	890/55			$18,500	
	1	2A 4-a	TR-OS	ST	15	3	May-94	BRZ	$18,125	LAI
	2	2B 2g	TR-OS	ST	18	10/3	Oct-94	USA	$38,900	LAI
Sub-Totals	2				33	13/3			$57,025	
Total:	12				111	903/58			$75,525	

TRADE AND INVESTMENT STATUTES AND REGULATION - TC 2

IV. SUMMARY

E. MISCELLACEOUS

Status	#	MISCELLANEOUS AEP	CODE	Description, for, etc	Required	Total Cost	Respons
	1	2C 4-a	MISC	Passangers LIS-BXO (2 people)	1994	$2,400	LAI
	2	2C 4-a	MISC	Hotel Bissau (2 people)	1994	$2,000	LAI
Totals	2					$4,400	

TIPS

WORK PLAN STATUS REPORT

TECHNICAL COMPONENT - 3

LEGAL AND ADMINISTRATIVE ADJUDICATION

PERIOD

10/1/93 TO 12/31/94

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

SUMMARY: OUTPUTS & SUB-OUTPUTS

OUTPUT 3A - INDEPENDENT JUDICIARY ESTABLISHED AND CAPACITY UPGRADED

SUB-OUTPUT 3A 1 - Judiciary System Capacity Upgraded

SUB-OUTPUT 3A 2 - Install Small Claims Courts

SUB-OUTPUT 3A 3 - Legislation for Independent Judicial System

OUTPUT 3B - ADJUDICATION CAPACITY IN EXECUTIVE OFFICES UPGRADED

SUB-OUTPUT 3B 1 - Survey Existing Regulatory (administrative) Law

SUB-OUTPUT 3B 2 - Administrative Law and Science of Public Administration Course

SUB-OUTPUT 3B 3 - Ministry of Commerce and Industry

OUTPUT 3C - IMPROVE EXPERTISE OF JUDGES AND LAWYERS

SUB-OUTPUT 3C 1 - Sets of Codes

SUB-OUTPUT 3C 2 - Economic Judicial Decisions

SUB-OUTPUT 3C 3 - Trade and Investment disputes resolution

SUB-OUTPUT 3C 4 - Commercial Law Handbook

SUB-OUTPUT 3C 5 - Index Listing

SUB-OUTPUT 3C 6 - Penal Law Course

SUB-OUTPUT 3C 7 - Bar Association

OUTPUT 3D - ADJUDICATION AND JUDICIAL SYSTEMS TRANSPARENT AND ACCOUNTABLE

SUB-OUTPUT 3D1 - Adjudication System

SUB-OUTPUT 3D 2 - Judicial System Dissemination

OUTPUT 3E - TRADITIONAL CONFLICT RESOLUTION SYSTEMS INTEGRATED

SUB-OUTPUT 3E1 - Small Claims Courts

SUB-OUTPUT 3E 2 - Traditional Law Study

SUB-OUTPUT 3E 3 - Study on Systems of Adjudication of Traditional Law Conflicts

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

ANNUAL REPORT: OUTPUTS & SUB-OUTPUTS

OUTPUT 3A - INDEPENDENT JUDICIARY ESTABLISHED AND CAPACITY UPGRADED

An independent judiciary system is being established and its capacity upgraded to facilitate efficient, fair and impartial adjudication of conflicts regarding T&I transactions; the court system, from traditional levels through the Supreme Court, has been restructured and streamlined through improved administration to provide timely and efficient recourse for T&I disputes. The judiciary system is receiving a minimum of material support, to function effectively and maintain its independence.

SUB-OUTPUT 3A 1 - JUDICIARY SYSTEM CAPACITY UPGRADED

Material and Bibliographical Needs

TIPS analyzed and updated recommendations and cost estimates in the IPC-sponsored study on material and bibliographical needs of the Guinean Judiciary System (including the Ministério Público), then prioritized needs and produced a procurement plan. Local carpenters have been contracted to manufacture chairs, tables, desks, book-cases, shelves, for delivery in October (IN PROGRESS).

Courts Library

TIPS will produce a plan for a "Courts Library", to be installed in the Supreme Court of Justice, based on the survey of bibliographical needs of Courts (3A -1-abc), including library room repairs, procurement of materials and equipment, and a training program for two librarians (TO BE DONE/94).

Supreme Court Repairs

TIPS reviewed follow-up requests on repairs to the Supreme Court building when additional damage was discovered, determined sources of funding for repairs, conducting public bidding for the work then awarded contracts. (IN PROGRESS)

Substance and Procedures of T&I Disputes

TIPS will conduct surveys with the participation of AMAGUI, OAGB, GELD and other commercial dispute arbitrators, to identify issues (in substance and procedures) concerning T&I disputes, then determine which issues to address through seminars and workshops, and produce a training plan for judges and lawyers in accordance with current Guinean needs, with special attention to women's participation. Reports will be produced (TO BE DONE/94).

Procedures on Commercial Dispute Resolution

TIPS will produce, with participation of the Law School and others, as appropriate, an action plan to restructure and streamline the existing procedures on T&I dispute resolution and conflict management. Report will be produced (TO BE DONE/94).

Notariado and Registos Públicos Technical Training

TIPS has surveyed the needs for restructuring and technical training for staff of the "Notariado and Registos Públicos", and is now preparing an implementation plan for training staff and administrative personnel (IN PROGRESS).

SUB-OUTPUT 3A 2 - INSTALL SMALL CLAIMS COURTS

Small Claims Courts Material and Legal Reference Needs

TIPS surveyed material and legal reference needs for proper functioning of new system of Small Claims Courts (Tribunais de Sector). TIPS prepared a procurement list and is procuring material and legal reference. Local carpenters have been contracted to manufacture chairs, tables, desks, book-cases, and shelves for delivery in October (IN PROGRESS).

Magistrates Training Course

TIPS has conducted, in conjunction with Law School and MJ, training courses for new Magistrates of Small Claims Courts - Tribunal de Sector. Thirty-five (35) magistrates (1 woman) were trained over an eight-week period. In conjunction with the course, TIPS brought in Brazilian judges to deliver five conferences on the Brazilian experience with Small Claims Courts and other legal subjects (DONE).

Magistrates Internship - 1st. Phase

TIPS conducted, in conjunction with the Ministry of Justice, a six-week Internship in Adjudication and Judicial Practice for Magistrates of the new Small Claims Courts. Twenty-five judges (one woman), participated in this practical internship, adjudicating actual cases through two "pilot" Courts under the supervision of Judges of the Regional Court of Bissau and Supreme Court. Substantive report produced (DONE).

Magistrates Internship - 2nd. Phase

TIPS conducted, in conjunction with Ministry of Justice and Supreme Court the second phase of the Internship in Adjudication and Judicial Practice for Magistrates and Court Clerks of new Small Claims Courts, during 30 working days (105) hours. Twenty-five judges (one woman) and twenty four Court Clerks (three woman), participated in the internship, adjudicating real cases through two "pilot" Courts under the supervision of Judges of the Supreme Court. Substantive report produced (DONE).

Court Clerks Training

TIPS analyzed a request by the Minister of Justice for a Court Clerks (escrivão) training course, then conducted, in participation with CENFA, a 40-day training course for thirty-five people (3 woman). Report produced (DONE).

SUB-OUTPUT 3A 3 - LEGISLATION FOR INDEPENDENT JUDICIAL SYSTEM

Legislation for Independent Judicial System

TIPS is analyzing, in conjunction with a working group and representatives of MJ, AMAGUI, OAGB, and Ministério Público, the remaining enabling legislation that is needed to restructure and administer an independent judiciary system. Draft amendments and additional legislation are being prepared. A final draft will be submitted to Minister of Justice (IN PROGRESS).

OUTPUT 3B - ADJUDICATION CAPACITY IN EXECUTIVE OFFICES UPGRADED

Executive offices involved in adjudication of T&I disputes and/or regulation are establishing clear, transparent, and efficient mechanisms for the administrative adjudication of private/public conflicts regarding executive T&I regulations and procedures.

SUB-OUTPUT 3B 1 - SURVEY EXISTING REGULATORY (administrative) LAWS

Regulatory (Administrative) Law

TIPS will survey, compile, codify and index the existing regulatory (administrative) laws and regulations, concerning T&I activity, then publish and disseminate these laws. (TO BE DONE/94).

SUB-OUTPUT 3B 2 - ADMINISTRATIVE LAW AND SCIENCE OF PUBLIC ADMINISTRATION

Administrative Law and Science of Public Administration Course

TIPS will support modules "F" and "G" of the Administrative Law and Science of Public Administration Course, planned and to be conducted by Law School of Bissau (POSTPONED).

SUB-OUTPUT 3B 3 - MINISTRY OF COMMERCE AND INDUSTRY

Ministry of Commerce and Industry

TIPS has identified material and staff training needs in connection with the implementation of the MC&I's decentralization plan of MC&I, based on the final report of the National Conference on Commercial Law, the Organic Law of the MC&I, and the newly approved laws relating to Access to Commercial Activity. TIPS conducted two (2) study tours (including inspection and working sessions) for a working group, with representatives from TIPS and MC&I, to Gabu and Buba Delegations of MC&I. Report produced.(DONE).

MCI Pilot Delegation (Pilot Decentralization)

TIPS is providing commodities to support MCI decentralization (IN PROGRESS).

Inspection and Control

TIPS is supporting MCI decentralization, developing regional offices with personnel capable of implementing functions locally, including registration of firms, issuing permits, monitoring and maintaining statistics (previously not done) on cross-border trade and appropriate inspection and control functions. Personnel for these functions will be retrained to change the existing approach from policing to facilitating and monitoring T&I. A study tour to Portugal on inspection and control is being prepared for two technical staff members of the commerce for Ministry of Commerce and Industry. A report will be produced on findings and recommendations (IN PROGRESS).

OUTPUT 3C - IMPROVE EXPERTISE OF JUDGES AND LAWYERS

Expertise of judges and lawyers in T&I laws and regulations, as well as in traditional conflict resolution system, is being improved, and judges and lawyers are being trained and educated in the substance and procedures of T&I disputes.

SUB-OUTPUT 3C 1 - SETS OF CODES

Sets of Codes

TIPS has already distributed sets of Commercial, Civil and Penal Codes, and other laws relating to T&I (produced under IPC), and will now analyze the need for additional sets, then publish and distribute such sets, as appropriate (TO BE DONE/94).

SUB-OUTPUT 3C 2 - ECONOMIC JUDICIAL DECISIONS

Economic Judicial Decisions

TIPS will produce a study on the impact of judicial decisions on the economy in general, and on private sector firms and activities in particular, using results of IPC-sponsored research on court cases adjudicated during 1991 and 1992 (completed in 2/94) having economic significance, in order to determine if special training should be provided to sensitize judges and lawyers to the economic effect of decisions or mishandling of cases. TIPS will produce a recommendation report on training needs (TO BE DONE/95)

SUB-OUTPUT 3C 3 - TRADE AND INVESTMENT DISPUTE RESOLUTION

Trade and Investment

TIPS will conduct a seminar for magistrates and lawyers on "how-to" conduct dispute resolution in T&I issues, using the pre-1974 Portuguese Commercial Law Code, which is now in force in Guinea-Bissau. This training will improve the ability of both lawyers and judges to handle cases expeditiously, and improve the quality of decisions. TIPS will produce a recommendation report for more training, as needed (TO BE DONE/95).

SUB-OUTPUT 3C 4 - COMMERCIAL LAW HANDBOOK

Commercial Law Handbook

TIPS will analyze the T&I cases identified in C.2 above, then classify them according to the issues and laws involved. From this a handbook of model cases will be produced, containing brief descriptions of typical T&I cases, legal issues involved, and decisions rendered in past. The handbook will be published and distributed to all Courts of First Instance (TO BE DONE/95).

SUB-OUTPUT 3C 5 - INDEX LISTING

Index Listing

TIPS will publish and distribute to magistrates and lawyers, codified cross-indexed listing of current T&I laws, decrees and regulations (See future actions of 2A 1-def) (TO BE DONE/95).

SUB-OUTPUT 3C 6 - PENAL LAW COURSE

Penal Law Course

TIPS conducted, in conjunction with Law School, MJ, Procuradoria Geral da República and other donors, a a twelve-week course on the new Guinean Penal Code and Penal Procedure Code, for thirty people from the Ministério Público (Public Prosecutor's Office, Judiciary Police and other Police). In conjunction with the course, a "Ciclo de Conferências" (with 8 conferences) was held for course participants and the general public with speakers from Bissau and Portugal (DONE).

SUB-OUTPUT 3C 7 - BAR ASSOCIATION

Bar Association

TIPS has surveyed the material and organizational needs of the OAGB in achieving its mandate to oversee and improve the professional skills of lawyers in T&I disputes. A report has been produced. (DONE)

Improve Bar Association Operation

TIPS will conduct a three-week study tour (for up to three members of OAGB) to the U.S., Brazil, Portugal and West African countries, to better understand the relationship between the Bar Association and the Private Sector, and examine the structure and operation of other bar associations. TIPS will produce a report on findings (TO BE DONE/95).

Workshop on Bar Association Role in Private Sector

TIPS, building on the results of the above study tour, will hold a workshop on the relationship between the Bar and the Private Sector, then determine additional training needs and produce a plan for future actions. (TO BE DONE/95)

International Bar Association Annual Meetings

TIPS has prepared a plan for appropriate members of OAGB to attend the International Bar Association annual meetings in US, Brazil, West Africa and elsewhere, in order to exchange experiences (DONE).

OUTPUT 3D - ADJUDICATION AND JUDICIAL SYSTEMS TRANSPARENT AND ACCOUNTABLE

Adjudication systems is being transparent and accountable; judicial procedures is being transparent; there has been procedures for disseminating decisions and evaluating adjudicators, and respect for the court system and adjudication by executive branch entities and officials, and the public, has been build up.

SUB-OUTPUT 3D 1 - ADJUDICATION SYSTEM

Court Organization and Judicial Procedures - I

TIPS will design a study tour for a selected group of magistrates, lawyers and PNA members to Brazil, Portugal and Senegal, to study organization and procedures of courts and other adjudication systems. TIPS will produce a report its findings and recommendations concerning procedures and systems that may be applied to Guinea-Bissau (TO BE DONE/95).

Court Organization and Judicial Procedures - II

TIPS will conduct workshops/roundtables for Magistrates, lawyers and PNA members concerning findings and recommendations of study tour group of Activity D1, to seek understanding and acceptance of reforms to ensure transparent adjudication and judicial systems. TIPS will analyze needs for additional legal changes (TO BE DONE/95).

SUB-OUTPUT 3D 2 - JUDICIAL SYSTEM DISSEMINATION

Judicial System Dissemination

TIPS, in conjunction with the OAGB and the private sector, is organizing TV and Radio, monthly programs on the judicial system (in Portuguese and Creole) including topics such as how to use the new Small Claims Courts with emphasis on economic and agricultural issues (IN PROGRESS).

OUTPUT 3E - TRADITIONAL CONFLICT RESOLUTION SYSTEMS INTEGRATED

Traditional conflict resolution systems are being identified, evaluated and improved or integrated, as appropriate.

SUB-OUTPUT 3E 1 - SMALL CLAIMS COURTS

Small Claims Courts

TIPS, using reports on traditional disputes, will produce a study on the impact of the new system of local courts and its impact on traditional systems of adjudication (TO BE DONE/95).

SUB-OUTPUT 3E 2 - TRADITIONAL LAW STUDY

Traditional Law Study

TIPS supported a study on the economic formulation of customary commercial and business laws, including the adjudication of conflict. With assistance of tips, the consultants presented a seminar on their findings and recommendations (DONE).

SUB-OUTPUT 3E 3 - STUDY ON SYSTEMS OF ADJUDICATION OF TRADITIONAL LAW CONFLICTS

TIPS will plan and conduct a study tour to up to three African countries to examine systems of adjudication of traditional law conflicts in modern courts, then conduct seminar and conferences on systems and functioning organizations and procedures of adjudication of traditional/customary law conflicts in modern courts. Recommendations will be produced (TO BE DONE/94).

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

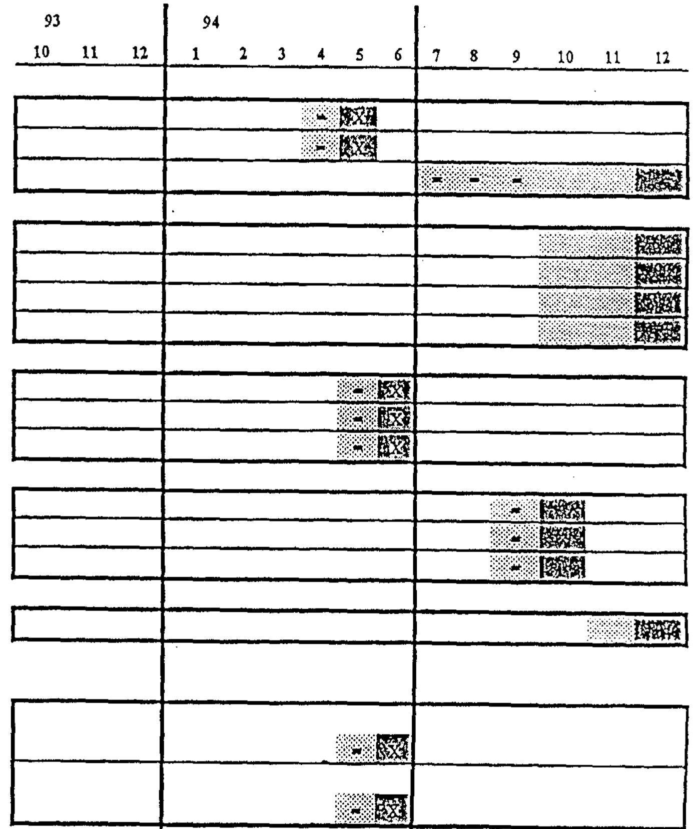
ЛMARY

s BY MONTH STATUS AS OF 30/9/94

3A - INDEPENDENT JUDICIARY ESTABLISHED AND CAPACITY UPGRADED

OUTPUT 3A 1 - Judiciary System Capacity Upgraded

Activity	Status as of 9/30/94	
3A 1-a Analyze and update cost estimate of material needs	Completed	May-94
3A 1-b. Produce a list of priority for purchase of material and bibliography	Completed	May-94
3A 1-c. Produce procurement plan	Started	Jul-94
3A 1-d. Produce implementation plan of courts Library	To be started	Oct-94
3A 1-e. Conduct repairs of library room	To be started	Oct-94
3A 1-f. Procure materials for library	To be started	Oct-94
3A 1-g. Conduct training program for librarians	To be started	Oct-94
3A 1-h. Review follow-up requests on repairs of supreme court building	Completed	Jun-94
3A 1-i. Determine sources of funding and additional involvement	Completed	Jun-94
3A 1-j. Review bids and awared contracts	Completed	Jun-94
3A 1-k. Conduct survey on issues in T&I judicial disputes	To be started	Sep-94
3A 1-l. Determine issues in T&I disputes for seminars and workshops	To be started	Sep-94
3A 1-m. Produce training plan for seminars and workshops	To be started	Sep-94
3A 1-n Produce an actionplan to restructure and streamline procedures on T&I disputes resolution	To be started	Nov-94
3A 1-o Survey needs for restructuring of "Notariado" and "registos Públicos" services	Completed	Jun-94
3A 1-p. Survey needs of technical training for staff of "Notariado" and "Registos Públicos" services	Completed	Jun-94



Sub-Totals

		93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
Started	11							2	5		1		3			
To be started	5													4	1	
Due	16								2	5				3		6
Completed	7								2	5						

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LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

OUTPUT 3A 2 - Install Small Claims Courts

Activity	Status	Date
3A 2-a. Survey material needs for small claims courts	Completed	May-95
3A 2-b. Produce list of procurement	Completed	May-94
3A 2-c. Procure material and legal reference	Started	Jul-94
3A 2-d Conduct training course for magistrates of small claims courts	Completed	May-94
3A 2-e. Conduct internship for magistrates of small claims courts - 1st. Phase	Completed	Jul-94
3A 2-f. Conduct internship for magistrates and court clerks of small claims courts - 2nd phase	Completed	Sep-94
3A 2-g. Produce needs assessment for training court clerks of small claims courts	Completed	May-94
3A 2-h Conduct training course for court clerks	Completed	Jul-94

OUTPUT 3A 3 - Legislation for Independent Judicial System

Activity	Status	Date
3A 3-a. Analyze remaining enabling laws	To be started	Sep-94
3A 3-b. Produce draft amendments and additional legislation	To be started	Sep-94
3A 3-c. Submit final draft to minister of justice	To be started	Sep-94

3B - ADJUDICATION CAPACITY IN EXECUTIVE OFFICES UPGRADED

OUTPUT 3B 1 - Survey Existing Regulatory (administrative) Law

Activity	Status	Date
3B 1-a. Survey, compile and index existing T&I laws and regulations concerning administrative adjudication	To be started	Oct-94
3B 1-b. Publish and disseminate survey	To be started	Oct-94

Sub-Totals

	Total	93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
Started	8						1		1	1	1	1	3			
To be started	1													1		
Due	13								4		2		1	4	2	
Completed	7								4		2		1			

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

Activity	Status	Date
-OUTPUT 3B 2 - Administrative Law and Science of Public Administration Course		
3B 2-a. Support administrative law and science of public administration course		
OUTPUT 3B 3 - Ministry of Commerce and Industry		
3B 3-a. Identify needs for staff training	Completed	Jun-94
3B 3-b. Identify material and equipment needs	Completed	Jun-94
3B 3-c. Provide commodities to support MC&I decentralization	To be started	Oct-94
3B 3-d. Conduct a study tour to Portugal on inspection and control of commerce for Ministry of Commerce and Industry staff	To be started	Oct-94
3B 3-e. Produce a report on findings and recommendation	To be started	Oct-94
T 3C - IMPROVE EXPERTISE OF JUDGES AND LAWYERS		
-OUTPUT 3C.1 - Sets of Codes		
3C 1-a. Produce assessment of needs for additional sets of codes	To be started	Oct-94
3C 1-b. Publish and distribute sets as appropriate	To be started	Oct-94
J-OUTPUT 3C 2 - Economic Judicial Decisions		
3C 2-a. Produce a study of the impact of judicial decisions on the economy	To be started	95
3C 2-b. Produce assessment of needs for training of judges and lawyers	To be started	95
3C 2-c. Produce a recommendation report for training	To be started	95
B-OUTPUT 3C 3 - Trade and Investment disputes resolution		
3C 3-a. Conduct a seminar for magistrates and lawyers on T&I dispute resolution	To be started	95

Sub-Totals

		93 10	93 11	93 12	94 1	94 2	94 3	94 4	94 5	94 6	94 7	94 8	94 9	94 10	94 11	94 12
Started	2								2							
To be started	3													3		
Due	7									2				1	3	1
Completed	2									2						

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

	Status	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12
OUTPUT 3C 4 - Commercial Law Handbook																
3C 4-a. Produce analysis of cases identified in 3C2 - economic judicial decisions	To be started 95															
3C 4-b. Classify cases according to category of issues and laws	To be started 95															
3C 4-c. Produce handbook of models of typical T&I cases	To be started 95															
3C 4-d. Publish and distribute handbook to courts of first instance	To be started 95															
OUTPUT 3C 5 - Index Listing																
3C 5-a. Publish and distribute cross-index listing of current T&I laws	To be started 95															
OUTPUT 3C 6 - Penal Law Course																
3C 6-a. Conduct a course on new Guinea Bissau's penal and penal procedure code	Completed May-94															
OUTPUT 3C 7 - Bar Association																
3C 7-a. Produce assessment of material and organizational needs of OAGB	Completed Aug-94															
3C 7-b. Produce report on findings	Completed Aug-94															
3C 7-c. Conduct a study tour on bar associations	To be started 95															
3C 7-d. Produce report on how bar association deals with private sector	To be started 95															
3C 7-e. Produce report on bar associations structure and operation	To be started 95															
3C 7-f Hold a workshop on the role of the bar association in the private sector	To be started 95															
3C 7-g Produce a plan for OAGB exchanges	Completed Sep-94															
Sub-Totals																
	Started 1					1										
	To be started 0															
	Due 4								1			2	1			
	Completed 4								1			2	1			
		10 93	11	12	1 94	2	3	4	5	6	7	8	9	10	11	12

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

3D - ADJUDICATION AND JUDICIAL SYSTEMS TRANSPARENT AND ACCOUNTABLE

OUTPUT 3D1 - Adjudication System

Activity	Status	Date
3D 1-a. Design a study tour plan on organization and procedures of courts	To be started	95
3D 1-b. Conduct study tour on organization and procedures of courts	To be started	95
3D 1-c Produce report on findings and recommendations	To be started	95
3D 1-d Conduct a workshop on study tour organization and procedures of courts	To be started	95
3D 1-e. Produce a recommendation report	To be started	95

OUTPUT 3D 2 - Judicial System Dissemination

Activity	Status	Date
3D 2-a. Hold meetings on judicial system dissemination	To be started	Oct-94
3D 2-b. Organize and execute TV and Radio programs on judicial system	To be started	Oct-94

3E - TRADITIONAL CONFLICT RESOLUTION SYSTEMS INTEGRATED

OUTPUT 3E1 - Small Claims Courts

Activity	Status	Date
3E 1-a. Produce a study of impact of new small claims courts	To be started	95

OUTPUT 3E 2 - Traditional Law Study

Activity	Status	Date
3E 2-a. Produce study on economic formulation of customary commercial laws	Completed	Apr-94
3E 2-b. Conduct a seminar on findings and recommendations	Completed	Apr-94

OUTPUT 3E 3 - Study on Systems of Adjudication of Traditional Law Conflicts

Activity	Status	Date
3E 3-a. Plan and conduct a study tour of adjudication of traditional law conflicts	To be started	Oct-94
3E 3-b. Produce a report	To be started	Oct-94
3E 3-c Conduct a seminar on traditional law conflicts adjudication	To be started	Oct-94

Sub-Totals

	Total	93-10	93-11	93-12	94-1	94-2	94-3	94-4	94-5	94-6	94-7	94-8	94-9	94-10	94-11	94-12
Started	1				1											
To be started	5													5		
Due	7							2							3	2
Completed	2							2								

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LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

TOTALS

	Total	93-10	93-11	93-12	94-1	94-2	94-3	94-4	94-5	94-6	94-7	94-8	94-9	94-10	94-11	94-12
Started	23	0	0	0	1	1	1	2	8	1	2	1	6	0	0	0
To be started	14	0	0	0	0	0	0	0	0	0	0	0	0	13	1	0
Due	47	0	0	0	0	0	0	2	7	7	2	2	2	8	8	9
Completed	22	0	0	0	0	0	0	2	7	7	2	2	2	0	0	0

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LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

SUMMARIES

CHNICAL INPUTS

			93			94												Total Allocation
			10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	Days
TERM EXPATRIATES (LTX)																		
	1	POL					0.58	0.78	1.62	2.12	2.12	1.87	3.33	1.33	3.25	2.50	0.50	20.00
	2	LEG					1.08	1.68	3.18	5.35	4.35	4.35	4.75	3.75	9.17	5.17	3.17	46.00
	3	PVT					0.58	0.78	0.78	0.78	1.03	1.28	0.75	0.75	1.92	1.17	1.17	11.00
otal	3		0.00	0.00	0.00	0.00	2.25	3.25	5.58	8.25	7.50	7.50	8.83	5.83	14.33	8.83	4.83	77.00
TERM LOCALS (LTL)																		
	1	ECO													1	1		2.00
	2	J&L					1.08	1.68	3.35	5.68	4.93	5.18	4.92	4.92	11.92	8.67	4.67	57.00
	3	AGB					0.33	0.33	0.33									1.00
	4	AGE					0.33	0.33	0.33									1.00
	5	TRN					0.50	1.10	1.10	2.43	2.93	2.93	1.00	1.00	1.00	1.00		15.00
otal	5		0.00	0.00	0.00	0.00	2.25	3.45	5.12	8.12	7.87	8.12	5.92	5.92	13.92	10.67	4.67	76.00
TERM EXPATRIATES (STX)																		
	1	LEGAL														9.00		9.00
	2	NOBLE					0.50	1.10	1.10	1.10	1.10	1.10						6.00
	3	TRN							1.00									1.00
	4	E. GALVÃO								6.00								6.00
	5	G. OG								6.00								6.00
	6	ISASCA								12.00								12.00
	7	JOURN													4.00			4.00
otal	7		0.00	0.00	0.00	0.00	0.50	1.10	2.10	25.10	1.10	1.10	0.00	0.00	4.00	9.00	0.00	44.00
			10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	
			93			94												

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LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

		93			94												Total Allocation
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	Days
TERM LOCAL - (STL)																	
1								0.50	0.50	0.50	3.83	3.83	3.83				13.00
2	ABDU								3.00	3.00							6.00
3	D. FERREIRA							4.00	11.00	7.00	7.00						29.00
4	EMBALO								3.00	3.00							6.00
5	JOURN													1.67	1.67	1.67	5.00
6	LEGAL											6.00	10.00	24.67	20.67	7.67	69.00
7	LEGAL/AMAGUI										7.50	7.50	7.50	7.50			30.00
8	LEGAL/MJ										7.50	7.50	7.50	7.50			30.00
9	LEGAL/MP										7.50	7.50	7.50	7.50			30.00
10	LEGAL/OAGB										7.50	7.50	7.50	7.50			30.00
11	LEGAL/STJ										7.50	7.50	7.50	7.50			30.00
12	LIB														10.00	10.00	20.00
13	M. DO CÉU									15.00	15.00						30.00
14	MUNIRA								3.00	3.00							6.00
15	PROCEL					0.50	0.50	3.50	7.37	6.87	7.12	7.45	4.45	6.25	4.00	3.00	51.00
16	TRN													1.50	1.50		3.00
17	VENÂNCIO											15.00	15.00				30.00
otal 17		0.00	0.00	0.00	0.00	0.50	0.50	8.00	27.87	38.37	70.45	69.78	70.78	71.58	37.83	22.33	418.00
32		0.00	0.00	0.00	0.00	5.50	8.30	20.80	69.33	54.83	87.17	84.53	82.53	103.83	66.33	31.83	812.00

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

IV. SUMMARY

C. TRAINING

Status	#	TRAINING AEP	CODE	Type	Training Days	Trainees	Starts	Where	Estimated Cost ($)	Respons
Compl	1	3A 1-g	TR-L	Course	15	2	Nov-94	GB-B	$1,500	TIPS
Compl	2	3A 2-d	TR-L	Course	45	35/1	Mar-94	GB-B	$18,555	TIPS
Compl	3	3A 2-e	TR-L	Internship	30	25/1	Jun-94	GB-B	$2,800	TIPS
Compl	4	3A 2-f	TR-L	Internship	30	50/6	Aug-94	GB-B	$6,770	TIPS
	5	3A 2-h	TR-L	Course	30	35/6	May-94	GB-B	$19,500	LAI
Compl	6	3B 2-a	TR-L	Course	21	35	1994	GB-B	$7,500	LAI
Compl	7	3C 3-a	TR-L	Sem.	10	25	1995	GB-B		LAI
	8	3C 6-a	TR-L	Course	66	30	Feb-94	GB-B	$11,400	LAI
	9	3C 7-f	TR-L	Workshop	2	20/5	1995	GB-B		LAI
	10	3D 1-d	TR-L	WS	10	35	Nov-94	GB-B		LAI
	11	3B 3-c	TR-L	SEM	3	30	Nov-94	GB-B	$2,500	LAI
Sub-Totals	11				262	322/19			$70,525	
	1	3B 3-d	TR-OS	ST	30	2	Oct-94	Portugal	$8,000	LAI
	2	3B 3-a	TR-OS	ST	12	4	Oct-94	AFC-Count.	$18,000	LAI
	3	3C 7-c	TR-OS	Study Tour	21	3	1995	US BRAZIL PORTUGAL AFC Country		LAI
	4	3D 1-b	TR-OS	Study tour	30	6	1995	Brazil Portugal Senegal		LAI
Sub-Totals	4				93	15			$26,000	
Totals	15				355	337/19			$96,525	

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LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

IV. SUMMARY

D. COMMODITIES

Status	#	COMMODITIES AEP	CODE	Items	Units	For	Required	Total Cost	Respons
	1	3A 1-f	COM	Books		Library	Dec-94	$0	LAI
	2	3A 1-f	COM	Cabinet	0	Library	Dec-94	$0	LAI
	3	3A 1-f	COM	Cabinet-Index	0	Library	Dec-94	$0	LAI
	4	3A 1-f	COM	Tables	0	Library	Dec-94	$0	LAI
	5	3A 1-f	COM	Chairs	0	Library	Dec-94	$0	LAI
	6	3A 2-c	COM	Chair	641	Courts	Sep-94	$11,044	LAI
	7	3A 2-c	COM	Desk (big)	27	Courts	Sep-94	$10,384	LAI
	8	3A 2-c	COM	Desk	55	Courts	Sep-94	$16,925	LAI
	9	3A 2-c	COM	Table	22	Courts	Sep-94	$2,538	LAI
	10	3A 2-c	COM	Book-Case	31	Courts	Sep-94	$10,730	LAI
	11	3A 2-c	COM	Book-Case (big)	15	Courts	Sep-94	$4,615	LAI
	12	3A 2-c	COM	Legal Reference	0	Courts	Sep-94	$500	LAI
	13	3B 3-c	COM	Furniture for del site (2 file cabinets, 2 file holders, desk repair, repair cabinet, 2 desks, 2 office chairs, 6 chairs 1 typist desk)		MC&I	Oct-94	$1,800	LAI
	14	3B 3-c	COM	Equipment (1 manual typewriter, 1 copy machine)	2	MC&I	Oct-94	$1,300	LAI
	15	3B 3-c	COM	Generator Solar panel	1	MC&I	Oct-94	$3,000	LAI
	16	3C 5-a	COM	Cross-index		Magistrates/ Lawyers	1995	$0	LAI
Totals:	16				794			$62,836	

LEGAL AND ADMINISTRATIVE ADJUDICATION - TC 3

IV. SUMMARY

E. MISCELLANEOUS

Status	#	MISCELLANEOUS AEP	CODE	Description, for, etc.			Required	Total Cost	Respons
	1	3A 1-abc	MISC				Apr-94	$31,000	LAI
	2	3A 1-e	MISC	Library	Room	Repairs	Oct-94	$10,000	LAI
	3	3A 1-j	MISC	Supreme	Court	Repairs	Jun-94	$20,000	LAI
	4	3B 3-c	MISC	Repair of Site	MC&I	1	Oct-94	$5,000	LAI
	5	3B 3-c	MISC	Vehicle Repair	MC&I	1	Oct-94	$3,000	LAI
	7	3D 3-b	MISC	Tape Recorder			Oct-94	$0	LAI
	8	3D 3-b	MISC	Tapes			Oct-94	$0	LAI
	9	3D 3-b	MISC	Video Tapes			Oct-94	$0	LAI
	10	3D 3-b	MISC	Blocks			Oct-94	$0	LAI
Total	10							$69,000	

TIPS

WORK PLAN STATUS REPORT

TECHNICAL COMPONENT - 4

DIRECT PRIVATE SECTOR SUPPORT

PERIOD

10/1/93 TO 12/31/94

DIRECT PRIVATE SECTOR SUPPORT - TC 4

SUMMARY: OUTPUTS & SUB-OUTPUTS PAGE

ANNUAL REPORT: OUTPUTS & SUB-OUTPUTS

DIRECT PRIVATE SECTOR SUPPORT - TC 4

OUTPUT 4A - PRIVATE INTEREST GROUPS STRENGTHENED AND SERVICES PROVIDED

TIPS supports the development of private interest groups and their organizational structure in all sectors of the economy through increasing their capability (particularly in organizational strategy and development, and administration and financial management), and ability to provide services to group members (particularly in marketing, statistics, international trade, extension, project development and financial training), and supporting their development of "strategic plans of action".

Changes have occurred over the last year in the composition and increased number of private sector interest groups. TIPS' activities have had to adjust to this growing number of associations and increased demand for support.

SUB-OUTPUT 4A 1. Câmara do Comércio, Indústria e Agricultura (CCIA)

The CCIA, while still the grandfather of private interest groups in Guinea-Bissau, has to demonstrate its importance to both its own members and to affiliated associations. Several changes have occurred in the administration of the CCIA within the past year. Furthermore, the CCIA is trying to redefine its role as a representative of all businesses and business groups. There is a current trend to create a national federation of the six regional CCIAs and the CCIA in Bissau plus the other affiliated associations that make up the CCIA, such as ANAG, ANEP, AIM, AMAE, and AGUIPEC. The question whether it should be solely a federation of commercial associations or include industrial and agricultural associations has not yet been resolved. If it is organized as a federation of only commercial associations than the next development would be to form a co-federation or a national business counsel of the other business associations and federations, including the areas of agriculture, industry and fisheries.

TIPS has supported the creation of the National Commission of Private Sector Associations (CASP) as the representative of the entire business community.

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CASP is utilized to administer TIPS projects, and support trainings, study tours, workshop material distributions, and extension services.

TIPS has supported the CCIA in the design of a plan for an "Administrative and Financial Management System". Additionally, TIPS will develop a program for financial self-sustainability and produce a plan of action for the CCIA to become a more effective organization which is responsive to the needs of its members.

TIPS supports the position of developing national business policy and changes in commercial law. Five regional conferences with 120 businesses (including twenty women) were sponsored by TIPS. The results of these conferences were presented during the National Conference on Commercial Law and were instrumental in making policy, legal, and regulatory changes that improved the environment for private sector activities and development.

SUB-OUTPUT 4A 2. Associação Nacional dos Agricultores da Guiné-Bissau (ANAG)

ANAG was the second private sector organization to form in Guinea-Bissau. It started as a commercial farmers' association for the large farmers with government land concessions ("Pontieos"), but has since evolved to include small traditional farmers and their associations.

TIPS is presently supporting ANAG in the design of an "Administrative and Financial Management System" plan, and is developing a program for financial self-sustainability. A financial plan of action will be developed to assist them in becoming a more effective organization that is responsive to its members' needs.

SUB-OUTPUT 4A 3. Guineense de Pequenos Comerciantes (AGUIPEC)

AGUIPEC, recently formed within the past year, is the largest private sector association in the country. During the National Conference on Commercial Law, the small and informal business sectors felt the lack of representation of their views and interests. AGUIPEC was the result of a national campaign to organize this business sector.

TIPS supported six regional conferences, with a total attendance of over 1,200 people (including 240 women), for the development of AGUIPEC. TIPS also promoted elections for regional delegates and supported the formation of AGUIPEC's national assembly and the election of its national officers, with an attendance of 210 people (including forty women).

SUB-OUTPUT 4A 4. Associação das Mulheres de Actuação Económica (AMAE)

OUTPUT 4B - EXPANDED TRADE AND INVESTMENT PROMOTION SERVICES

TIPS is supporting the development of information services for business associations specifically in the following areas: marketing information for the national and international price of products that are within the critical growth sub-sector (CGS); economic information on CGS products in order for the private sector to become more effective; support for business association courses and trainings in marketing, market studies, international trade, and administration and financial management in order to increase the services provided by business associations to their members and the public at large; support and develop programs for the promotion of investment and trade of CGS products for business and business associations, especially in T&I, as well as in new technology, in order for business to develop new opportunities; and organize and support international trade missions for business and business associations to make contacts for future T&I collaboration and to learn about investment possibilities.

SUB-OUTPUT 4B 1. Information Services

TIPS, with the assistance of ANAG and CCIA, developed and promoted a market information service (SIMA), for agricultural producers, merchants, traders, brokers, and exporters. This service provides daily price information of the most important agricultural products, foreign exchange rates, imported rice prices, and price trends and differences to all the major commercial centers of the country.

SUB-OUTPUT 4B 2. Training Services

TIPS promoted and supported the creation of a national business counsel (CASP) to coordinate and manage four courses for training of trainers in business skills. These courses were designed around five different training manuals developed by AFRICARE for USAID/TIPS. The manuals cover basic business skills, including business planning, creations and legalization of a business in Guinea-Bissau, government regulation for a business, simple accounting, and how to get financing and credit.

The TIPs supported Training of Trainers' course in Bissau provided thirty-five people (including seven women) with training in the use of the business manuals. The participants included members of CCIA, ANAG, as well as other private sector interest groups. A detailed overview of the guides was presented with a practical methodology on how to design a training program for people from the business community. As a result of this effort, "in-house" training services for private sector interest groups' members have improved.

TIPS supported CASP in three intensive training and orientation workshops in the three regional commercial centers: Bafata, Canchungo, and Catio. 135 people (including twenty-seven women) participated in these training of trainers workshops on how to use the manuals on business guides for future trainings. A detailed overview of the manuals was organized and a practical methodology presented on how to design trainings for future participants from the private sector. Following each workshop, the manual was presented to the public and the local business community. The long-rang objective is to improve "in-house" training services provided by private sector interest groups to their members.

TIPS has produced a plan for a private sector business skills scholarship program. A committee under CASP, with representation from the private sector associations, has been formed with a directive to administer a program which would provide scholarships to selected individuals of private sector business associations and their employees.

SUB-OUTPUT 4B 3. International Trade

TIPS organized and executed a trade mission for CCIA members to "La Puerta de Gran Canaria". They attended a business fair where they made business contacts for future collaboration in order to increase trade and investment in the CGS areas.

OUTPUT 4C - INCREASE PRIVATE SECTOR ECONOMIC ACTIVITIES IN CGS

SUB-OUTPUT 4C 1. Mango

TIPS sponsored and developed a mango export promotion program through CCIA and ANAG that determined the 1994 export potential by both variety and quality.

TIPS assessed the results of the 1993 export program; determined the number of producers that are interested in mango exportation; listed constraints for the mango export industry; provided technical assistance to local producers in the preparation, packing, and storing of mangoes; developed marketing and operations support services; produced a survey of air and sea transportation availability; and made commercial contacts with European importers for the 1994 crop.

TIPS produced recommendations for increasing the production capacity of commercial varieties.

TIPS sponsored and developed a training of trainers program for thirty-five local producers and agricultural technicians in ANAG and government extension agencies in the proper identification and selection of principal commercial varieties of mangos. Trainings in nursery management practices and fruit tree grafting in order to increase the exportable crop from existing tree stock were also conducted.

Using the trainers from the previous program, TIPS supported ANAG in a regional training of twenty-five local small farmers in proper identification and selection of principal commercial varieties of mangos as well as training in nursery management practices and fruit tree grafting in order to increase the exportable crop from their existing tree stock.

SUB-OUTPUT 4C 2. Cashew Nuts

TIPS is developing and executing a decentralized cashew shelling pilot project with three traditional communities' ("tabancas") producers' associations affiliated with ANAG. The project involves buying and stocking raw nuts; shelling, drying and removing the skins; selection and classification; and packing, stocking, transporting, and shipping the cashew kernels. To date, the project has accomplished the following:

a. TIPS has made contact with local government officials in order to inform them of the proposed project and get their collaboration; they (local government) have agreed to provide a training facility and have already held preliminary discussions with the local "tabancas";

b. TIPS has found a buyer for the proposed production; the buyer, Cultural Survival has agreed to purchase all commercial quality production;

c. TIPS has developed a budget for the training center;

d. TIPS is preparing the training center for the project; i.e. repairs;

e. TIPS has started the selection process for trainers and trainees;

f. TIPS has bought two complete sets of shelling equipment, including oven racks for pre- and post-drying, short term storage containers, tables and benches, and 100 individual cashew nut shellers;

g. TIPS has purchased eleven tons of raw cashew nuts for commercial sale;

h. TIPS is organizing and will execute a technical study tour to a decentralized cashew processing cooperative in "Serra de Mel", Rio Grande de Norte, Brazil. The purpose of the study tour will be to provide participants with a basic knowledge of decentralized cashew nut shelling as an artisan home activity, its management and organizational needs, as well as become familiar with the necessary processing equipment, quality requirement, minimum production scale, training needs, family labor use, marketing potential, and the potential economic impact for cashew home processing.

OUTPUT 4D - ANALYTICAL BASE IMPROVED

SUB-OUTPUT 4D 1. Goal Report

TIPS has developed and produced a standardized data-collection monitoring and reporting system.

TIPS collected and presented data sets of the Contract Goal, including pre 1992 time series data, 1992 base-year data, and yearly progress of all measures included in the contract through 1994. TIPS also completed an External Factors Report.

SUB-OUTPUT 4D 2. Primary Objective Report

TIPS has developed and produced a standardized data-collection monitoring and reporting system.

TIPS has produced an annual "Primary Objective Report" showing the progress to date, including history, current, potential, and constraints of the CGS areas.

SUB-OUTPUT 4D 3. Research Agenda

SUB-OUTPUT 4D 4. Work Plans

TIPS has prepared and produced a Work Plan for TC - 4: Direct Private Sector Support to cover the period from October 1993 to September 1994.

TIPS has prepared and produced a Work Plan for TC - 4: Direct Private Sector Support to cover the period from October 1993 to December 1994.

IV. SUMMARIES

A. AEPs BY MONTH - STATUS AS OF 9/30/94

Status as of 9/30/1994

OUTPUT 4A - PRIVATE INTEREST GROUPS STRENGTHENED AND PROVIDE SERVICES

SUB-OUTPUT 4A 1. Camara de Comercio, Industria e Agricultura - CCIA

Activity	Status as of 9/30/1994
4A 1-a. Design a Plan for an Administrative and Financial Management System	completed Aug-94
4A 1-b. Develop a program for Financial Self-Sustainability	started Jun-94
4A 1-c. Produce a Financial "Plan of Action"	started Jul-94
4A 1-d. Hold five (5) Regional Conferences on Commercial Law	completed Mar-94
4A 1-e. Prepare & hold regional conferences to develop a national strategy for CCIA	due '95
4A 1-f. Support the development of a Federated Business Associations structure	due '95
4A 1-g. Hold a national conference to develop a National Business agenda	due '95
4A 1-h. Design a "Plan of Action" for the National Business agenda	due '95

SUB-OUTPUT 4A 2. Associacao Nacional dos Agricultores da Guine-Bissau - ANAG

Activity	Status as of 9/30/1994
4A 2-a. Design a Plan for an Administrative and Financial Management System	started Sep-94
4A 2-b. Develop a program for Financial Self-Sustainability	due Nov-94
4A 2-c. Produce a Financial "Plan of Action"	due Nov-94
4A 2-d. Prepare & hold regional conferences of agricultural associations	due '95
4A 2-e. Promote and hold an Agricultural Associations National Conference	due '95
4A 2-f. Produce a list of Problems and Opportunities facing the agricultural sector	due '95
4A 2-g. Support the development of a "Federation" of agricultural associations.	due '95
4A 2-h. Design a Strategic Plan of action	due '95

Sub-Totals

	Total	10 (93)	11	12	1 (94)	2	3	4	5	6	7	8	9	10	11	12
to be started	2													2		
started	5					1			1	1	1		1			
due	7						1					1		2	3	
completed	2						1					1				

SUB-OUTPUT 4A 3. Associação Guineense do Pequenos Comerciantes - AGUIPEC

	Status	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12
4A 3-a. Hold six (6) Regional Conferences	completed May-94						=	=	x							
4A 3-b. Promote Elections for Regional Delegates	completed May-94							=	x							
4A 3-c. Prepare for a National Assembly	completed May-94							=	x							
4A 3-d. Promote and Hold a National Assembly for AGUIPEC	completed May-94								x							
4A 3-e. Support the Elections of National Officers	completed May-94								x							
4A 3-f. Promote and Hold regional conferences for AGUIPEC members	due '95															
4A 3-g. Promote and hold an AGUIPEC National Conference	due '95															
4A 3-h. Produce a list of Problems and Opportunities facing the commercial sector	due '95															
4A 3-i. Design a Strategic Plan of Action	due '95															

SUB-OUTPUT 4A 4. Associação das Mulheres de Actuação Económica - AMAE

	Status	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12
4A 4-a. Hold five (5) Regional Conferences	due Nov-94															
4A 4-b. Produce a list of Problems and Opportunities facing Business Women	due Nov-94															
4A 4-c. Promote and Prepare a National Assembly	due Nov-94															
4A 4-d. Promote and Hold a National Assembly for AMAE	due '95															
4A 4-e. Support the development of a "Federation" of women's association	due '95															
4A 4-f. Produce a Strategic Plan of Action	due '95															

SUB-OUTPUT 4A 5. Associação das Empresas Nacionais de Pesca da Guiné-Bissau - ANEP

	Status	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12
4A 5-a. Hold Regional Conferences of fishing associations	due '95															
4A 5-b. Develop a program for Financial Self-Sustainability for ANEP	due '95															
4A 5-c. Produce a Financial "Plan of Action" for ANEP	due '95															
4A 5-e. Promote and Hold a National Conference of fishing associations	due '95															
4A 5-c. Produce a Strategic Plan of Action	due '95															

Sub-Totals

	Total	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
to be started	3													3		
started	5						1	2	2							
due	8								5						3	
completed	5								5							
		93			94											

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OUTPUT 4B - EXPANDED TRADE AND INVESTMENT PROMOTION SERVICES

SUB-OUTPUT 4B 1. Information Services

Activity	Status
4B 1-a. Create a data base for CCIA, ANAG and TIPS	due '95
4B 1-b. Publish a Business Survey and Directory	due '95
4B 1-c. Develop a Market Information Service	completed Nov-93
4B 1-d. Establish a national Market Information Service	completed Mar-94
4B 1-e. Evaluate the "SIMA" Market Information Service	due Nov-94
4B 1-f. Produce a self-sustainable Market Information Service Publication	due Dec-94
4B 1-g. Develop an Economic Information Data Base	due '95
4B 1-h. Develop and Implement a Data Collection, Monitoring and Analysis system	due '95
4B 1-i. Publish an "Anuario Estatistico de Economia da Guinea - Bissau"	due '95

SUB-OUTPUT 4B 2. Training Services

Activity	Status
4B 2-a. Conduct Trainers Workshop on "Business Guides" manuals	completed Aug-94
4B 2-b. Conduct three (3) Regional Seminars on "Business Guide" Manuals	completed Sep-94
4B 2-c. Conduct business workshop using "Business Guides" Manuals	due Oct-94
4B 2-d. Conduct business workshop using "Business Guide" Manuals	due Nov-94
4B 2-e. Conduct evaluation workshop on "Business Guide" Manuals	due Nov-94
4B 2-f. Produce a plan for a Private Sector Business Skills Scholarship Program	completed Sep-94
4B 2-g. Create and implement a Private Sector Business Skills Scholarship Program	due Dec-94

SUB-OUTPUT 4B 3. International Trade

Activity	Status
4B 3-a. Organize and execute a Trade Mission to "La Puerta de Gran Canaria"	completed Apr-94

Sub-Totals

	Total	93-10	93-11	93-12	94-1	94-2	94-3	94-4	94-5	94-6	94-7	94-8	94-9	94-10	94-11	94-12
to be started	5													1	4	
started	7		2			1	1				2	1				
due	12		1				1	1				1	2		4	2
completed	6		1				1	1				1	2			

OUTPUT 4C - INCREASE PRIVATE SECTOR ECONOMIC ACTIVITIES IN CGS

SUB-OUTPUT 4C 1. Mango

Activity	Status
4C 1-a. Produce a mango crop projection for 1994	completed Nov-93
4C 1-b. Produce a list of inputs and operational needs for exportation	completed Nov-93
4C 1-c. Produce a survey of air and sea transportation availability	completed Mar-94
4C 1-d. Produce a list of potential importers	completed Mar-94
4C 1-e. Training in identification of principal commercial varieties of mango	completed Jun-94
4C 1-f. Training in nursery management practices	completed Jun-94
4C 1-g. Training in grafting techniques including "top-working"	completed Jun-94
4C 1-h. Conduct regional trainings in variety identification and grafting techniques	completed Jul-94
4C 1-i. Conduct a experiment in "flower induction" technology in order to anticipate production	due Dec-94

SUB-OUTPUT 4C 2. Cashew Nuts

Activity	Status
4C 2-a. Establish an agreement with the government	started Feb-94
4C 2-b. Establish an agreement with a buyer	started Feb-94
4C 2-c. Develop a budget for training center repairs and installations	started Jul-94
4C 2-d. Repair and prepare training center	started May-94
4C 2-e. Train 100 people in cashew home shelling from small producers communities	due Dec-94
4C 2-f. Execute a study tour to Brazilian artisan decentralized cashew nut shelling	due Feb-95
4C 2-g. Purchase training equipment	started Jul-94
4C 2-h. Purchase raw cashew nuts for commercial production	completed Aug-94
4C 2-i. Train associations in cashew nut processing management	due Dec-94
4C 2-j. Prepare and train association in business administration	due Dec-94
4C 2-k. Train for cashew marketing	due '95
4C 2-l. Promote a dissemination program on decentralized cashew nut processing	due '95

Sub-Totals

	Total	93 10	11	12	94 1	2	3	4	5	6	7	8	9	10	11	12
to be started	4													4		
started	14		2			4			4	1	3					
due	18		2				2			3	1	1		5	1	3
completed	9		2				2			3	1	1				

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OUTPUT 4D - ANALYTICAL BASE IMPROVED

SUB-OUTPUT 4D. Goal Report

Activity	Status
4D 1-a. Produce a "Goal Report" format	completed Sep-94
4D 1-b. Indicators and Targets of Contract Goal Achievement presented	completed Sep-94
4D 1-c. External factors impacting on Contract Goal Achievement presented	completed Sep-94
4D 1-d. Produce a "Goal Report"	completed Sep-94

SUB-OUTPUT 4D 2. Primary Objective Report

Activity	Status
4D 2-a. Produce a "Primary Objective Report" format	completed Sep-94
4D 2-b. Historical series, 1992 base-year and current yearly data on CGS presented	completed Sep-94
4D 2-c. Potential for new private sector activity presented	completed Sep-94
4D 2-d. Primary constraints to increased private sector activity in the CGS presented	completed Sep-94
4D 2-e. Produce a "Primary Objective Report"	completed Sep-94

SUB-OUTPUT 4D 3. Research Agenda

Activity	Status
4D 3-a. Produce a Cashew Sector Study	started Sep-94
4D 3-b. Conduct a Cashew Sector Workshop	started Sep-94
4D 3-c. Produce an "Analytical/Strategic Planning Cashew" Report	started Sep-94
4D 3-d. Produce a Vegetables Sector Study	due '95
4D 3-e. Conduct a Marketing Study tour	due Dec-94
4D 3-f. Conduct a Vegetables Sector Workshop	due '95
4D 3-g. Produce an "Analytical/Strategic Planning Vegetables" Report	due '95
4D 3-h. Produce a Forestry Sector Study	due '95
4D 3-i. Conduct a Marketing Study tour	due Dec-94
4D 3-j. Conduct a Forestry Sector Workshop	due '95
4D 3-k. Produce an "Analytical/Strategic Planning Forestry" Report	due '95
4D 3-l. Produce a desk survey of "traditional" small producers	due '95
4D 3-m. Produce production and commercial models	due '95
4D 3-n. Publish a series of production profiles	due '95
4D 3-o. Hold a work shop on traditional small producers	due '95

Sub-Totals

	Total	93: 10	11	12	94: 1	2	3	4	5	6	7	8	9	10	11	12
to be started	2														1	1
started	13					5						4	4			
due	14												9	3		2
completed	9												9			

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	Status	10/93	11	12	1/94	2	3	4	5	6	7	8	9	10	11	12
SUB-OUTPUT 4D 4. Work Plans																
4D 4-a. Prepare and produce 10/93 to 9/94 "Work Plan" (first)	completed Oct-93															
4D 4-b. Prepare and produce 10/93 to 12/94 "Work Plan" (second)	completed Sep-94															
4D 4-c. Prepare and produce 10/94 to 4/96 "Work Plan" (third)	due Oct-94															

Sub-Totals

	Total	10/93	11	12	1/94	2	3	4	5	6	7	8	9	10	11	12
to be started	0															
started	3	1					1						1			
due	3	1											1	1		
completed	2	1											1			

TOTALS

	Total	10/93	11	12	1/94	2	3	4	5	6	7	8	9	10	11	12
to be started	16	0	0	0	0	0	0	0	0	0	0	0	0	10	5	1
started	47	1	4	0	0	11	3	2	7	2	6	5	6	0	0	0
due	62	1	3	0	0	0	4	1	5	3	1	3	12	11	11	7
completed	33	1	3	0	0	0	4	1	5	3	1	3	12	0	0	0

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DIRECT PRIVATE SECTOR SUPPORT - TC 4

'V. SUMMARIES

;. TECHNICAL INPUTS

		93			94											
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
-ONG-TERM EXPATRIATE (LTX)																
-TX1	1 POL	4.00	1.00	1.00			2.05	3.05	3.19	2.86	2.36	14.69	16.02	6.48	3.64	0.67
-TX2	2 LEG	4.00					4.05	2.05	3.19	2.86	2.36	14.69	16.02	6.14	3.64	0.67
-TX3	3 PVT	18.00				17.03	26.74	22.24	32.24	25.24	23.24	25.57	37.57	38.69	21.47	9.97
'ub-Total	3	26.00	1.00	1.00	0.00	17.03	32.83	27.33	38.62	30.95	27.95	54.95	69.62	51.31	28.76	11.30
'ONG-TERM LOCAL (LTL)																
-TL1	1 P&S						0.86	0.86	1.00	2.00	1.83	23.83	25.17	5.48	3.64	0.67
TL2	2 L&J						2.86	0.86	1.00	2.00	1.50	13.83	15.17	6.48	2.64	0.67
TL3	3 AGB					22.84	27.70	17.70	32.36	25.36	27.86	26.20	34.20	39.34	27.23	8.23
TL4	4 AGE					15.84	21.70	19.70	24.70	21.70	19.70	22.70	28.70	29.84	16.73	12.73
-TL5	5 TRN							4.00	1.00	7.50	9.50	20.50	15.50	11.00	16.00	
;ub-Total	5	0.00	0.00	0.00	0.00	38.68	53.11	43.11	60.06	58.56	60.39	107.06	118.72	92.13	66.24	22.29
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
		93			94											

DIRECT PRIVATE SECTOR SUPPORT - TC 4

		93			94											
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
HORT-TERM EXPATRIATE - (STX)																
TX	1 Leifert	4.00														
TX4	3 Bryon - 2						18.00									
TX4	4 Bryon -1		18.00													
STX4	5 Bus. Directory															
STX4	6 Cunha - 1		18.00													
STX4	7 Cunha - 2						18.00									
STX4	8 Cunha - 3														18.00	
STX4	9 Currey - 1									12.00	2.00					
STX4	10 Currey - 2															
STX4	11 Currey - 3														6.00	
STX4	12 Econ/Ag													18.00		
STX4	13 Econ/Anthro														18.00	
TX4	14 Envo/Fish														18.00	
STX4	15 Envo/Forest															
STX4	16 Marketing													9.00		
STX4	17 Moraes									18.00						
STX4	18 Noble							2.00	1.00	1.00						
STX4	19 J. Medeiros												18.00	18.00		
STX4	20 Tropic													9.00		
STX4	21 Mgt/Adm												22.00	22.00	22.00	22.00
STX4	22 Publishing															
STX4	23 Trainer/Mgt												12.00			
Sub-Total	23	4.00	36.00	0.00	0.00	0.00	36.00	2.00	1.00	31.00	2.00	0.00	52.00	76.00	82.00	22.00
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
		93			94											

DIRECT PRIVATE SECTOR SUPPORT - TC 4

		93			94											
		10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
HORT-TERM LOCAL- (STL)																
TL4	1 Adm/Mgt									21.00	21.00	21.00	7.33	24.83	32.83	18.00
TL4	2 Almami Fati								20.00	20.00	20.00	20.00	20.00	20.00	20.00	
TL4	3 Data Entry															
STL4	4 Econ/Ag												17.50	17.50		
TL4	5 Econ/Anthro														21.00	21.00
STL4	6 Econ/Stat											30.00	30.00			
TL4	7 Envo/Fish													19.00	19.00	
TL4	8 Envo/Forest															
STL4	9 Jamanca	4.00														
STL4	10 Jou-Liason															
TL4	11 MIS															
TL4	12 Publishing															
STL4	13 Stat/Com											30.00	30.00			
STL4	14 Mgt/Trainer												22.00	22.00	22.00	22.00
STL4	15 Trainer/Mgt												22.00	22.00		
STL4	16 Training											22.00	15.00	15.00	15.00	
STL4	17 VIEIRA											22.00	15.00		10.00	
STL4	18 Research															
Sub-Total	18	4.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00	41.00	41.00	145.00	178.83	140.33	139.83	61.00
Total:		34.00	37.00	1.00	0.00	55.70	121.94	72.44	119.68	161.51	131.34	307.01	419.18	359.77	316.83	116.59

DIRECT PRIVATE SECTOR SUPPORT - TC 4

IV. SUMMARY

C. TRAINING

Status	#	TRAINING AEP	CODE	Type	Training days	Trainees/ Women	Starts	Where	Estimated Cost ($)	Respons
Compl	1	4A 1-d	TR-L	Conf/R-Table	1	120/20	Mar-94	GB-I	$4,000	TIPS
Compl	2	4A 3-a	TR-L	Conf/R-Table	1	1200/240	May-94	GB-I	$5,000	TIPS
Compl	3	4A 3-d	TR-L	Conf/R-Table	1	210/40	May-94	GB-B	$5,000	TIPS
	4	4A 5-a	TR-L	Conf/R-Table	1	500/100	Nov-94	GB-I	$1,000	TIPS
	5	4A 5-d	TR-L	Conf/R-Table	1	100/20	Nov-94	GB-B	$1,000	TIPS
Compl	6	4B 2-a	TR-L	Work-S/Sem	5	15/5	Aug-94	GB-B	$6,000	AFC
Compl	7	4B 2-b	TR-L	Work-S/Sem	2	100/35	Sep-94	GB-I	$6,000	AFC
	8	4B 2-c	TR-L	Work-S/Sem	5	30/10	Oct-94	GB-B	$10,000	AFC
	9	4B 2-d	TR-L	Work-S/Sem	5	30/10	Oct-94	GB-B	$10,000	AFC
	10	4B 2-e	TR-L	Work-S/Sem	2	20/10	Nov-94	GB-B	$500	AFC
Compl	11	4C 1-efg	TR-L	Course	19	35/0	Jun-94	GB-B	$4,700	TIPS
Compl	12	4C 1-h	TR-L	Course	1	10/0	Jul-94	GB-B	$0	TIPS
	13	4C 2-e	TR-L	Course	45	100/80	Oct-94	GB-I	$2,000	TIPS
Compl	14	4C 2-i	TR-L	Course	48	9/6	Sep-94	GB-I	$1,000	TIPS
Compl	15	4C 2-j	TR-L	Course	48	9/6	Sep-94	GB-I	$1,000	TIPS
Compl	16	4C 2-k	TR-L	Course	48	9/6	Sep-94	GB-I	$1,000	TIPS
	17	4D 3-b	TR-L	Work-S/Sem	1	30/10	Oct-94	GB-B	$500	TIPS
	18	4D 3-c	TR-L	Work-S/Sem	1	30/20	Nov-94	GB-B	$500	TIPS
	19	4D 3-l	TR-L	Work-S/Sem	1	30/10	Sep-94	GB-B	$500	TIPS
Sub-Totals	19				236	3587/628			$59,700	
Compl	1	4B 3-a	TR-OS	Trade/Stu-Vis	5	7/0	Apr-94	TC-A	$12,810	TIPS
	2	4C 2-f	TR-OS	Trade/Stu-Vis	15	5/3	Oct-94	BRA	$19,200	LAI
Sub-Totals	2				20	12/3			$32,010	
Total	21				256	4009/861			$91,710	

DIRECT PRIVATE SECTOR SUPPORT - TC 4

IV. SUMMARY

D. COMMODITIES

Status	#	COMMODITIES AEP	CODE	Items	Units	For	Required	Total Cost	Respons
	1	4A 2-abc	COM	computer	1	ANAG	Sep-94	$1,000	LAI
	2	4A 2-abc	COM	printer	1	ANAG	Sep-94	$400	LAI
	3	4A 2-abc	COM	FAX	1	ANAG	Sep-94	$500	LAI
	4	4A 5-abc	COM	computer	1	ANEP	Nov-94	$1,000	LAI
	5	4A 5-abc	COM	printer	1	ANEP	Nov-94	$400	LAI
	6	4A 5-abc	COM	FAX	1	ANEP	Nov-94	$500	LAI
Compl	7	4C 2-g	COM	Nut shellers	100	ABC/ANAG	Aug-94	$8,000	LAI
Compl	8	4C 2-g	COM	Cardboard cartons	1500	ABC/ANAG	Aug-94	$2,000	LAI
Compl	9	4C 2-g	COM	Poly-alumium bags	1500	ABC/ANAG	Aug-94	$2,300	LAI
	10	4C 2-g	COM	Heat sealer	1	ABC/ANAG	Aug-94	$2,000	LAI
	11	4C 2-g	COM	Scale	2	ABC/ANAG	Aug-94	$1,000	LAI
	12	4C 2-g	COM	Vacuum packer	1	ABC/ANAG	Aug-94	$5,000	LAI
	13	4C 2-g	COM	FAX	1	ABC/ANAG	Aug-94	$500	LAI
Sub-Totals:	13		COM-OS		3111			$24,600	
	1	4A 2-abc	COM	phone/line	1	ANAG	Sep-94	$200	TIPS
	2	4A 5-abc	COM	phone/line	1	ANEP	Nov-94	$200	TIPS
	3	4C 2-g	COM	Tables/chairs	5/15	ABC/ANAG	Aug-94	$500	TIPS
	4	4C 2-g	COM	Phone/line	1	ABC/ANAG	Aug-94	$100	TIPS
Sub-Totals:	4		COM-L		8/15			$1,000	
Totals:	17				3119/15			$25,600	

DIRECT PRIVATE SECTOR SUPPORT - TC 4

IV. SUMMARY

E. MISCELLANEOUS

Status	#	MISCELLANEOUS AEP	CODE	Description, for, etc.	Required	Total Cost	Respons
In Progress	1	4C 2-g	MISL2	2. Training materials	Aug-94	$10,000	LAI
Sub-Totals	1		MISC-OS			$10,000	
In Progress	1	4C 2-d	MISL1	1. Materials for repair of training center	May-94	$10,000	TIPS
In Progress	2	4C 2-h	MISL3	3. Working capital loan for "Raw Material" i.e. (Raw cashew nuts for commercial sale) Note: project is not dependent on this item	Aug-94	$30,000	TIPS
	3	4C 2-l	MISL4	4. Materials for promotion of shelling techniques (visual aids, training materials, etc.)	Dec-94	$5,000	TIPS
Sub-Totals	3		MISC-L			$45,000	
Totals	4					$55,000	