



Prépare le Mali pour le monde – Amène le monde au Mali



Semiannual Report

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ABOUT TRADEMALI

Prépare le Mali pour le monde – Amène le monde au Mali.

TradeMali works to increase Mali's market positions regionally and internationally. The project is organized around two vital campaigns: The first, "Prepare Mali for the World," will assist Mali to create an inspiring policy environment and provide technical and managerial training to associations, agribusinesses, and selected government units to take advantage of potential opportunities. The second, "Bring the World to Mali," will generate real trade prospects by linking products and market buyers. Targeted products will include cereals, livestock, fruits and vegetables, and other agricultural-based products.

TradeMali is a three-year project with offices in Bamako, Mopti, Segou, and Timbuktu. It is one of three projects funded by the United States Agency for International Development working to improve agricultural productivity and incomes in Mali. TradeMali focuses on increasing trade in targeted agricultural sectors. Mali Finance works to provide wider access to financing for agricultural sectors and Mali Production seeks ways increase outputs of agricultural producers. Together the three projects target USAID's Accelerated Economic Growth strategy.

ABOUT THIS REPORT

This semiannual report is the first for TradeMali and details progress the project has made since its successful start-up (September 2003-February 2004). Based on the first year work plan and performance monitoring plan, this report compares targeted objectives with actual activities and highlights project deliverables. This report also gives recommendations for award fee evaluations.

It is hoped that this report will continue to lay the groundwork for future activities that make a lasting improvement in the lives of Malians.

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SECTION I

Semester Overview

TradeMali devoted its first semester (September 2003 to February 2004) to initial administrative and technical tasks required for start-up and immediate action due to the agricultural nature of the project. Malian staff was hired and expatriate staff put in place. Project staff participated in orientation and a team-building workshop and established administrative systems.

The project improved its office facilities by moving the Bamako office from the Centre Agro-Entreprise facilities in Korofina to a site close to USAID to permit more frequent contact and communications. Regional offices opened in major agricultural zones – Segou, Mopti, and Timbuktu – and planning for a fourth (Sikasso) is underway. New computer equipment and software were purchased and the computer network upgraded.

Project technical efforts included making contacts, gathering information, preparing the first year work plan and performance monitoring plan (PMP), and initial assistance activities. First-year commodity sectors were selected. Planning and technical assistance began for those activities requiring immediate action due to timing within their agricultural crop and marketing cycle. Preparations started for medium and longer term activities like action plans to implement quality programs at *Direction Générale de la Réglementation et du Contrôle* (DGRC), laboratories, and exporting companies, and strategic plans for commodity chains. Since several of the targeted commodity interventions did not apply to the North, the project investigated trade possibilities from the northern regions of Mali.

An important element of TradeMali's first semester work included establishing relations with key project counterpart organizations. The *Direction Nationale du Commerce et de la Concurrence* (DNCC) and Ministry of Industry and Commerce received particular attention. Assistance centered on the role and needs of the DNCC, and how TradeMali will provide support to the Integrated Framework and JITAP II processes. Talks with *Observatoire des Marchés Agricoles* (OMA) focused on collaborating on the collection and dissemination of potato, mango, and rice information. Planned meetings with the *Office du Niger* (ON) agribusiness unit focused on improving ON investment and marketing promotion. Meetings with other key private and public sector organizations contributed to a better understanding of the type of working relationships that could develop. Organizations consulted include:

- DGRC;
- DNSI;
- *Office de la Haute Vallée du Niger* (OHVN);
- *Assemblée Permanente des Chambres d'Agriculture du Mali* (APCAM);
- CNPI;
- Chambers of commerce; and
- Professional associations.

The first semester strategy included developing forums to discuss project direction and issues. TradeMali plays an important role in fostering public-private trade dialogue and one element of the approach is the TradeMali Project Advisory Committee, which is composed of individuals from the private and public sectors. The committee meetings provide an opportunity for members to exchange views on trade matters and resolve problems. A second element is the TradeMali Gender Committee. Given the current and potential role of women within agriculture and trade, the TradeMali team felt it important to bring together representatives associated with gender issues in business, trade, and agriculture. The gender committee provides guidance and advice to the project in developing a more facilitative environment for significant involvement of women.

The project also devoted attention to collaboration with existing and future development projects and private international companies. TradeMali uses a commodity sector approach to reaching its targets. Given that its principal focus begins at the post-harvest level, collaboration with TradeMali's sister projects within the Accelerated Economic Growth (AEG) portfolio is mandatory, as well as with other agricultural sector development programs (e.g., World Bank, CIDA, AFD). Joint planning sessions and activities were held with the Mali Finance Project, initial discussions undertaken with the Mali Production Project, and the Shafer Company project kept current on TradeMali's potato export trials and other commodity activities.

Communications is also vital to the TradeMali strategy. USAID's DevComm department and its CLIC project are viewed as critical partners and efforts were underway to forge a close relationship. Another project pillar is the development of a reliable export logistics system. MAERSK-Sealand has shown keen interest in mango export shipping operations and TransRail is interested in increasing freight shipments on its rail line to Dakar.

In summary, technical and administrative activities are close to schedule. Though the work plan and PMP documents were submitted behind schedule and still require approval, assistance to targeted beneficiaries has been provided in the meantime. TradeMali's activities are dependent on the targeted commodities' agricultural cycles. To ensure that a cropping and commercial/export cycle is not missed, the project team has had to work on field-level activities while writing the work plan and finalizing the PMP. In some instances, TradeMali had to delay activities on the work plan so as to devote attention to marketing and export planning. During the PMP process in October, TradeMali, the AEG team, and partners reached agreement on the targeted IR level indicators (i.e., export volumes of mangoes, potatoes, red meat, etc). During the semester, TradeMali has moved forward on activities aimed at hitting these targets and is well-positioned to continue and expand these activities.

SECTION II

Award Fee Evaluation

A. Summary

A1. Relevant Sections of Contract

C4. Performance Measures, Targets, and Benchmarks

“...Performance at the Sub-IR level and below is within the Contractor’s manageable interest and will be used as a basis for award fee payments.”

C4A. Contractor Benchmarks

“Benchmarks are the statement of activities for which the Contractor will be held accountable. These activities contribute to the achievement of the performance measures and other high-level results. These activities will serve as the evaluation factors of the Contractor’s award fee under the contract. A tentative set of first-year activities is listed below in section C7. These activities will be finalized by the Contractor during the mobilization period and, annually, for subsequent years during the annual work plan process.”

C7. Deliverables Schedule (i.e. Contractor Benchmarks)

Section IV of this report contains the First Year Work Plan Deliverables Schedule 2003-2004.

A2. Weighting of Performance Areas

Technical Management	70%	
On-time achievement of the (planned vs. actual) indicator/benchmarks		40%
Quality of the results achieved (planned vs. actual)		30%
Effectiveness of relationships with partners and others whose work is critical to achievement of overall results under the framework		30%
Total		100%
Business Management	20%	
Key persons deployed		45%
On-time reporting		35%
Control of USAID property		20%
Total		100%

Cost Considerations	10%
Financial projections	50%
Accurate reports	50%
Total	100%

Virtually all activities planned for the 90-day TradeMali mobilization period were completed as planned, with one exception. Submission of the work plan and PMP, due at the conclusion of Month 3, was delayed with the permission of the CTO, and submitted one week later. Ongoing discussions regarding the work plan and PMP between USAID and the project team continued in the second quarter and a final draft was submitted, following a presentation to USAID personnel, prior to the end of the quarter. We anticipate approval shortly.

Notwithstanding finalization of the work plan and PMP, project personnel initiated a broad scope of ongoing activities aimed at achieving TradeMali objectives. These activities have prepared and positioned important stakeholders in the Malian export sector to take better advantage of this year's agricultural season. The project's principle targets are set on an annual basis, and reporting against them semiannually appears somewhat premature. Nonetheless, early progress has been made as the first contract for export of potatoes to Senegal was signed ahead of schedule. During this first six months, all of the planned management and technical deliverables were implemented as planned.

TradeMali continues to monitor two key assumptions critical to the achievement of project objectives. First, early indications about the cost competitiveness of Malian products in the region have been discouraging and could constitute a substantial obstacle. Secondly, negotiations with the Dakar-Bamako railway company appear promising. In this regard, however, despite significant interest on the part of our GDA partner, MAERSK, the high cost of its services represents a constraint at this time.

The project made excellent progress on the business and financial management components of the project. Key personnel arrived and rapidly assumed their assigned roles. A team-building workshop facilitated this process. The necessary establishment of financial reporting and inventory control occurred as planned. Both USAID and Chemonics have continued to learn more about fixed-price contracts, a new mechanism for us both.

Finally, we have been pleased with our collaboration with the Mali Finance Project. Mali Finance Project staff attended the TradeMali team-building workshop and held an initial joint planning exercise. Successful collaboration will require the identification of opportunities that jointly relate to specific results. Project personnel have tentatively identified such activities in the potato, rice, and red meat sectors. In addition, a jointly sponsored BDS workshop was held in the second quarter.

B. TradeMali Evaluation (September 2003 – February 2004)

B1. Technical Management (70% of Overall Score)

B1a. On-time Achievement of the (Planned vs. Actual) Indicators and Benchmarks (40% of Technical Management)

We appreciate USAID participation and feedback in the development of final indicators and targets.

Substantial project activity in all of the technical areas was carried out during the first semester (as shown in Section III of this semiannual report and in the TradeMali Quarterly Report, September-November 2003). Project start-up proceeded according to schedule and included:

- Hiring and deployment of staff;
- Installation of systems;
- Equipment selection and purchase;
- Conduct of introductory partner meetings;
- Development of planning documents; and
- Initiation of technical activities.

Full reporting on established annual targets will occur in the first annual report. Nonetheless, we are pleased to note early progress towards targets for Sub IR 2.2.6 (Number of contracts resulting in commercial transactions) as measured by the signing of a contract to export potatoes to Senegal ahead of schedule.

Benchmarks or deliverables, determined for the first project year, appear in Section IV, First Year Work Plan Project Deliverables. Except for the first year work plan and PMP all planned semiannual deliverables were completed within the semester. Initial drafts of the work plan and PMP were submitted one week past the end of November due date. After lengthy reviews between the Mission and the TradeMali team second drafts were submitted in February. Further discussions resulted in a final draft submission presented in mid-March.

Evaluation: 35/40

B1b. Quality of the Results Achieved (Planned vs. Actual) (30% of Technical Management)

Please see Section III of this semiannual report and the TradeMali Quarterly Report, September-November

Benchmarks (Deliverables)

Project launch. This successful event was the second formal presentation of the project to actual and potential partners. The joint launch with Mali Finance, brought out 130 attendees, including: the Minister of Agriculture, Livestock, and

Fishing and the Minister of Food Security; representatives from TradeMali's supervising ministry (Ministry of Industry and Commerce) and the project's collaborating agency (DNCC); the private sector (companies, associations, and organizations); other governmental trade and agricultural related bodies (OMA, DNI, OMBEVI, ORS, DGRC, Customs, IER); and donor and development agencies (USAID, AFD, GTZ, CIDA, Swiss Development Agency, and World Bank). The audience found the session extremely informative and complimented the organizers and the presenters. The launch was covered by a local newspaper and national television. Subsequent to the launch, discussions were held and visits made with many of the attendees.

Establishment of the gender committee. The TradeMali Gender Committee will provide significant advice and generate momentum in furthering the role of women in TradeMali and trade activities. A select group of nine representatives from important private and public organizations were invited by the project's gender officer to join the committee. All accepted. At the first meeting the goals and objectives of TradeMali were presented, questions answered, and terms of reference and meeting schedule developed. A second meeting held in March reviewed the work plan, first semester activities and results, and made suggestions for immediate and medium-term activities. A list of committee members can be found in Annex A.

BDS workshop. Strengthening the capabilities of Malian business service providers is one way in which TradeMali will sustain its activities beyond the life of the project. A workshop was held – with Mali Finance and Helen Keller International – to present the projects and discuss/define what BDS is and its role in agriculture and trade in Mali. The participants expressed keen interest in working with the project. A list of workshop participants can be found in Annex B.

Outgoing sellers' tour to Senegal. In preparation for testing a new market for Malian potatoes, project staff accompanied a group of interested potential exporters to meetings with Senegalese potato importers. Market demand and requirements were identified, logistical arrangements determined, and expressions of interest and intentions voiced. Subsequently, test shipments were made. Taking advantage of the trip, meetings were held to make preparations for testing the Senegalese market and corridor to Europe for Malian mangoes. A better appreciation of potential markets, partnerships, and investment opportunities resulted, and the challenges (geographic and professional) which Malian exporters must address were identified.

Team-building workshop. As part of the initial process of coalescing TradeMali staff, partners, and beneficiaries into an integrated team with agreed-upon project objectives and strategies, a team-building workshop was held during start-up. Small group meetings focused on the PMP and work plan, gender, and consultative committees. The four-day workshop allowed the staff and partners to

better understand the project goals and objectives and how to work together to achieve them. The workshop included the participation of Mali Finance personnel.

Office start-up. The Bamako and the two regional offices (situated in the CARE facilities in Timbuktu and Segou) are staffed (technical and part-time monitoring and evaluation and administrative personnel) and have been in operation since the start of the project. The office in Mopti (in the CARE facility in Mopti) is used by the Segou technical advisor when performing work in the region. The Mali Finance office is also in the CARE building in Mopti. TradeMali's part-time Mopti monitoring and evaluation and administrative staff are located there as well. The Bamako office moved closer to USAID to permit more frequent and easier contact. The Timbuktu office, staffed by Malian staff experienced in the region, provides TradeMali a permanent presence in one of the Northern regions.

Deployment of personnel. Key personnel, well qualified for their positions, have been in place since project start-up and are making good progress (as evidenced by the information provided in Section III of this report). The full complement of local technical and administrative staff is also on board.

Evaluation: 25/30

B1c. Effectiveness of Relationships with Partners and Others Whose Work is Critical to Achievement of Overall Results Under the Framework (30% of Technical Management)

TradeMali has begun to solidify important relationships with key organizations including:

DNCC. A systematic series of meetings with the DNCC provided insight into strengths and weaknesses and how TradeMali can contribute to helping improve operations. TradeMali will be assisting with arrangements for the National Trade Symposium and in subsequent follow-up Integrated Framework activities.

Ministry of Industry and Commerce. Frequent discussions are held with the secretary general and advisors regarding the project advisory committee (the secretary general will preside) and the project scope of work. The secretary general has asked TradeMali to help with a comprehensive review of the DNCC responsibilities and resources as well as that of the other structures involved in trade.

Mali Finance Project. The two projects have identified a series of important opportunities for collaboration including the co-sponsorship of a BDS workshop (along with Helen Keller International); joint project launching; collaboration on CSV (Credit Stockage Vivrier – rice) activity with joint reviews of credit worthiness of village associations and proposals to financial institutions and probable involvement of Timbuktu micro-credit institution (in collaboration with

Mali Finance and Africare) in the CSV activity; and collaboration on work plans; collaboration on AFB financing and export proposal. Both projects have offices in CARE Mopti facilities, frequent meetings between chiefs of party and technical staffs, attendance at TradeMali Gender Committee meetings, and joint discussions on the DCA review.

Mali Agriculture Production Project. Initial meetings focused on presenting TradeMali objectives, strategies, and target commodities and included discussions on sharing an office in Sikasso. Mali Production has preliminary interest in potato and rice commodity sectors that will likely lead to collaborative activities. The production project's animal feed activity relates well to TradeMali's target of red meat exports.

Swiss International Cooperation. Swiss Aid is sponsoring mango production activities and has proposed using TradeMali's mango consultant to produce material and provide training in production topics.

AFD. French Aid would like to work with TradeMali in improving the quality of exported Malian mangoes and to organize a round table of development projects and donors in the mango sector.

World Bank. Discussions were held with World Bank staff presently designing their new commercial agriculture project, which will be a follow-on to the APROFA project and will be implemented in 2005. TradeMali objectives and strategies will be taken into consideration.

CIDA. Canadian Aid is designing a new agricultural project. TradeMali objectives, strategies, and commodities will be taken into consideration.

AFE, Enterprise Works, CECI. These North American NGOs have been active in the search for international markets for shea butter. Enterprise Works and CECI have expressed interest in subcontracting with TradeMali to expand their activities. A monthly collaborative meeting with AFE has been instituted since December 2003.

OMA. TradeMali has asked OMA to submit a proposal for gathering national (potatoes, mangoes) and regional price and export volume information (potatoes, mangoes, and rice) for several of our commodity sectors.

ON. The CSV activity is being explored in the Office de Niger zone; a weekly meeting with the ON business unit is scheduled; and ideas discussed for collaboration include training for and holding agricultural fairs and improving ON capacity in investment promotion.

OHVN. Discussions were held with OHVN on its activities. It is likely that TradeMali will collaborate with OHVN on its sesame operations.

Office Riz Ségou (ORS). TradeMali and ORS have held several discussions on collaborating on sesame and shea butter activities. The CSV activity is being extended to several rice production groups in the ORS zone.

DGRC and DNI. Discussions on collaboration led to plans to train DGRC and DNI regional staff in quality control issues.

In the transport sector our GDA partner MAERSK-Sealand/Mali has offered to provide equipment and infrastructure to assist in the expansion of sea-freighted mangoes. It has agreed to equip and provide two reefer containers to be used for pre-cooling mangoes. Costs are being reviewed. The Transrail railroad company would like to expand the outbound use of its services and is negotiating with MAERSK and exporters on the price of rail services for fruits and vegetables to Senegal. The Mali Freight Forwarding Council and the Transporters Union have been helpful in evaluating the cost of road blocks and extra-official charges, and the Ministry of Transportation is reviewing with TradeMali the issue of taxes on imported vehicles used for export trade purposes.

Among commodity sector and related associations TradeMali has held discussions with *Fédération de Groupements Inter-Professionnels du Bétail et de la Viande (FEBEVIM)*, *Association Malienne des Exportateurs des Fruits et Légumes (APEFEL)*, *Association Malienne des Exportateurs des Légumes et Fruits (AMELEF)*, *Association Malienne des Exportateurs des Produits de la Cueillette (AMEPROC)*, CONOSAM, AMAQ, REFAO, and the *Association des Transformatrices de Produits Agricoles Locaux (ATRAPAL)* seeking ways to reinforce the capacity of the associations to provide services to members, and has provided market information on red meat, mangoes, rice and potatoes to several.

Evaluation: 30/30

Total Technical Management: 90/100

B2. Business Management (20% of Overall Score)

B2a. Key Persons Deployed (45% of Business Management)

The four key personnel (Harvey Schartup, chief of party; Criss Juliard, BDS specialist; Abdoul Barry, policy specialist; and Louise Deslauriers, trade promotion specialist) arrived and began work as planned in September.

Evaluation: 45/45

B2b. On-time Reporting (35% of Business Management)

The semiannual report was handed in by the due date. The first Quarterly Report was handed in at the same time as the semiannual report.

Evaluation: 30/35

B2c. Control of USAID Property (20% of Business Management)

The computerized inventory system is in place. USAID and numbered project stickers are placed on items for clear identification. Project personnel are assigned to an inventory team and inventories are taken periodically and items are spot checked. Inventory items require written authorization by the chief of party to be moved from their locations.

Evaluation: 20/20

Total Business Management: 95/100

B3. Cost Considerations (10% of Overall Score)

B3a. Financial Projections (50% of Cost Considerations)

A computerized accounting and financial control system and trained Malian accounting staff have been in place since the start of the project. Accounting information is entered daily. The chief of party receives a weekly printout of monthly expenses to date. Monthly accounting information, a reconciled bank statement, and a projection of next month's cash needs is reviewed locally and then sent to the Chemonics home office in Washington at the end of each month. Cash is then wired to the project office if needed. A monitor/tracker showing (i) budgeted versus actual monthly and cumulative expenses and (ii) variances is provided to the project each month along with an internal invoice. At the home-office level, the TradeMali and Mali Finance teams combine pouches and trunk shipments to save money. Both projects shared expenses on the assignment of a short-term IT consultant on two trips to Mali to work on both projects.

Evaluation: 50/50

B3b. Accurate Reports (50% of Cost Considerations)

Subject to inspection and acceptance of deliverables Chemonics is paid the firm fixed unit price shown in B4. Payment Schedule of the contract. Upon completion of an approved deliverable, Chemonics provides the CTO with documentation and requests written acceptance. Once approval is received Chemonics sends the USAID controller's office an invoice showing current and cumulative charges and remaining funds. As requested, prior to the end of a quarter, the USAID controller's office receives a statement of paid and to-be-paid invoices for that quarter.

Evaluation: 50/50

Total Cost Considerations: 100/100

C. TradeMali Performance Self-Evaluation

	Points	Weighting	Weighted Average
Technical Management	90	70%	63
Business Management	95	20%	19
Cost Considerations	100	10%	10
Weighted Performance			92

SECTION III

Project Accomplishments

Successful activities in performance results PR 1 (improved capacity of export promotion institutions) and PR 2 (improved public-private partnership for export promotion) lead to the attainment of Sub IR 2.1 (improvement of the trade policy and institutional environment).

In this section, we discuss project activities in detail and examine planned results versus actual results. The activities show that much progress has been made in each project technical area. Constraints that have been discovered during the first semester are also discussed.

A. PR 1. Improved Capacity of Export Promotion Institutions (e.g., DNCC)

Under this performance result, TradeMali aims to help the Government of Mali (GOM) design and implement a national trade strategy to make Malian export products more competitive and to capture a larger share of regional and international markets. The project contributed to the Diagnostic Trade Integration Study (DTIS), under the aegis of the Integrated Framework, by reviewing and following up with the GOM, the authors, and USAID on the draft report. TradeMali focused principally on the agricultural trade sections and its comments shared with the authors and USAID. Once the GOM reviews the final draft, TradeMali will assist the DNCC to organize a National Trade Symposium during which trade stakeholders will voice and harmonize their views on how best to enhance the market share of Malian unprocessed and processed products. The Integrated Framework will culminate into the definition of a national trade strategy that will target improving competitiveness.

PR 1 also aims to strengthen the capacity of trade institutions to provide commercial information to end users. Doing so required assessing the capacity of the DNCC to gather trade data, process data into useful information for exporters, and carry out competitiveness analyses of Malian commodities in foreign markets. This assessment revealed that the DNCC is poorly equipped in modern technologies and understaffed and that the existing staff is overburdened with work and not sufficiently trained to fulfill the trade promotion mission assigned to the organization.

A further objective of PR 1 is the strengthening of Malian policy makers to negotiate bilateral or multilateral trade agreements, as well as formulate and implement policies and legislations. To this end, initial meetings were held with key ministries to establish relationships and begin concrete discussions.

Table 1: Planned and Realized Activities for PR 1 (Sept.2003-Feb. 2004)

PR 1	Planned during period	Actual	Results	Comments
Activity 1.1: Commercial capacity building	Help to finalize DTIS report, organize trade symposium, draw up action plan to define a national trade strategy Help DNCC set up an efficient market intelligence system	Contributed comments to DTIS report; followed up with GOM, authors, and USAID Began rapid assessment of DNCC strengths, weaknesses, and needs in logistics and training	Draft DTIS report issued DNCC need assessment and TradeMali's responses are still underway	DTIS French version from World Bank not ready for government; need to coordinate with Integrated Framework team and GOM to speed up process for design of national trade strategy. DNCC director and key staff often not available Need to mesh DNCC market intelligence with existing (and new) projects/ systems
Activity 1.2: Capacity building for commercial policy negotiation, formulation, and implementation	Assess capacity of DNCC staff (quality and quantity) to carry out its mission	Several meetings with DNCC staff to evaluate capability, organizational structure, authority, and responsibilities	DNCC understaffed to achieve expected results; difficult to recruit and retain qualified staff	Need to pursue thorough assessment of DNCC and strengthen capacity in light of upcoming policy issues

B. PR 2. Improved Public-private Partnership for Export Promotion

PR 2 entails supporting public-private dialogue in an environment where public policy makers and the business community do not always communicate effectively. The team met with business associations, individual exporters, and the Office of the Moderator responsible for assisting the private sector in addressing constraints through public-private sector dialogue. An example of such a constraint has been the high cost of transport which, at times, makes Malian exports non-competitive or of low profitability. TradeMali has been in touch with the staff of the Ministry of Transport and transporters and truck drivers to find ways to curtail transport costs. Cutting back on utility vehicle import duties and reducing the number of roadblocks and collection of illicit taxes along various transport corridors were identified as areas of focus and will be addressed in subsequent private-public sector joint workshops and forums.

Table 2: Planned and Realized Activities for PR 2 (Sept. 03 – Feb. 04)

PR 2	Planned during period	Actual	Results	Comments
Activity 2.1: Support to public-private sector dialogue	Meet with individual businesses, professional organizations, Office of the Moderator, and public institutions to identify policy priorities and foster dialogue between public and private sectors	Met with individuals, businesses, professional organizations, Office of Moderator, staff of Ministry of Transport. All suggested that it would be worthwhile to explore reducing import duties on utility vehicles and marketing inputs, as well as reducing roadblocks and illicit taxes	Important policy issues identified	Need to meet more often with private sector to highlight the concerted actions required to influence public policy Need to convene various formal and informal meetings to debate openly policy issues
	Collaborate with ongoing regional initiatives on roadblocks and illicit taxes	Met with the CILSS staff spearheading regional initiative on reducing roadblocks and illicit taxes	Public-private sector dialogue underway to reduce import duties on utility vehicles	
	Set up TradeMali's Project Advisory Committee, a platform for enhancing public-private sector dialogue; guide for achieving targets	Terms of reference drawn; suggested member list developed; reviews with DNCC and MIC	MIC secretary general will chair; MIC issuing formal invitations for first meeting	Hold first meeting

TradeMali's Sub-IR 2.2. priority is to improve the competitiveness of selected Malian commodity chains – such as mango, potato, red meat, rice and shea butter, among others – for the export market. This is addressed through activities under:

- PR 3 Improved capacity of norms and standards dissemination institutions;
- PR 4 Increased opportunities for selected agricultural product exports; and
- PR 5 Improved partnerships for selected agricultural product exports.

C. PR 3 Improved Capacity of Norms and Standards Dissemination Institutions

Under PR 3, TradeMali aims to help Malian exporters implement quality management systems to establish the Malian origin in export markets as a symbol of quality. Prerequisite to this performance result is to:

- Help Malian institutions (i) understand how and why quality has become a mandatory feature of current production and global marketing systems, and (ii) develop strategies and mechanisms to disseminate and make useful the information on norms and standards and SPS agreements (sanitary and phytosanitary agreements as defined by the WTO), as well as on quality systems required by foreign markets (LPR, GAP, etc.);
- Ensure that agents in charge of quality control at airports and train stations and at various border entry/exit points are competent to apply required procedures and deliver certificates;
- Assist Malian laboratories in getting recognized accreditations; and
- Support Malian exporters in implementing quality management and traceability systems.

Table 3. Planned and Realized Activities for PR 3 (Sept. 2003-Feb. 2004)

PR 3	Planned during period	Actual	Results	Comments
Activity 3.1: Support for dissemination of norms and standards	Activity 3.1.1: Establish/support National Committee on Quality (DNI & DGRC)	Collaboration initiated with DGRC, DNI, and DNCC	Needs for assistance identified; Action Plan developed by DGRC	Increase collaboration with DGRC (focal point for quality on WTO-SPS agreement) and DNI; Fruit and vegetable committee needs to be revitalized
	Activity 3.1.2: Organize workshops & seminars on norms & standards <i>Not planned in the period</i>	Training needs for inspectors identified; Participation in national workshop on Quality (UEMO-UNIDO); Meeting with PIP representatives; Contacts established with ECOCERT representative in Dakar to hold a national workshop on quality as a commercial requirement and to meet international regulation	Identified lack of standard procedures or application/enforcement of as a major impediment	Draft program outline; Need to systematically participate in national workshops on quality; Follow up on PIP program with enterprises (identify trainer, assist enterprises in submitting request); Follow up on contacts with ECOCERT
Activity 3.2: Support for laboratory accreditation	Activity 3.2.1: Audit national laboratories (GLP) <i>Not planned in the period</i>			
	Activity 3.2.2: Design upgrading plan for accreditation <i>Not planned in the period</i>			
	Activity 3.3.3: Upgrade and obtain accreditation <i>Not planned in the period</i>			

PR 3	Planned during period	Actual	Results	Comments
Activity 3.3: Support to exporters for implementing quality management systems	Activity 3.3.1: Conduct company diagnostic (quality) <i>Not planned in the period</i>	Draft program outlined		
	Activity 3.3.2: Design individual plan to implement quality management systems Search for technical and financial support programs <i>Not planned in the period</i>			
	Activity 3.3.3: Train Malian trainers in quality, norms & standards <i>Not planned in the period</i>			
	Activity 3.3.4: Implement quality management systems (GAP, MPR) <i>Not planned in the period</i>			

D. PR 4 Increased Opportunities for Selected Agricultural Product Exports

Under PR 4, TradeMali aims to (i) help Malian exporters take advantage of market opportunities for export by increasing Mali's exposure to foreign traders and investors, and gain and sustain market shares in the region and in Europe; and (ii) assist target *filières* in getting better organized to cope with current global market trends and trade requirements. Two main activities will be conducted to achieve PR 4:

- Activity 4.1. Characterization of targeted commodity chains (demand, supply and trade conditions), coaching of exporters throughout the exporting cycle, workshop, and development plan per filière; and
- Activity 4.2. Capacity building of exporting companies (identification of investment opportunities, post-harvest technologies, and trade missions).

The main activities conducted under Activity 4.1 in the first six months of the project focused on collecting data on selected commodity chains in existing and potential markets or marketing channels through:

- A thorough documentary analysis;
- Meetings and working sessions with private and public partners;
- The preparation of pilot export operations along various commercial corridors; and
- Initial assistance to existing operations and corridors.

TradeMali also contributed to the initial stages of the development of commercial alliances between Malian exporters and importers from Senegal, Mauritania, Ghana, Gabon and Congo (mango, potato, red meat and rice), as well as from

Europe (for mango). As a result, (i) the *demand* for target products is being characterized in terms of requirements: market segmentation and buying criteria, volume, price, quality standards, conditioning, packing, labelling, shipping, distribution, retailing, etc; and (ii) constraints in existing markets are being identified. On the *supply side*, exporters' profiles have been prepared per filière. Suppliers and upstream linkages have been recognized, as well as barriers for trade and food safety measures (SPS agreements). Production yields and systems, quality and cost structures have been discussed to identify key areas for improvement. Several meetings with MAERSK and other transporters have concluded that high costs of transportation are severely hindering Malian competitiveness.

For potato and mango, a new commercial corridor – through Dakar – is being studied through pilot operations. A commercial mission has been conducted to assess the demand for these products and initiate negotiations with Senegalese importers.

Interest has been expressed for the Malian potato (mainly for its quality) and test orders of 20 MT have been sent to Malian exporters. So far, the high delivered price of Malian potatoes (250 FCFA/kg) is impeding exports. Malian potatoes are not price competitive compared to those imported from Holland (200 FCFA/kg) or those produced in Senegal (150-175 FCFA/kg). Work at the production level is necessary to reduce production costs and increase yields, which are highly overestimated. The high cost of transport must be addressed. A third issue is procurement of 25 kg jute bags, which have to be imported in large quantities from Côte d'Ivoire or India.

For mangoes, there is potential to develop partnerships (joint ventures eventually) to export Malian mangoes to Europe, and for now to export mangoes to Senegal for sale in local markets. Contacts between Senegalese importers and Malian exporters have been established and negotiations are currently being pursued.

Mali's livestock sector is fundamentally based in traditional and informal commercial practices. Exports of live animals have been a major source of revenue for the Malian economy for decades and during this time well-developed informal systems of market information, logistics, and sales have been developed. Transactions, set within a highly speculative framework, take place on small volumes of product with the objective of maximizing margins at each step in a long and often complicated commercial process. Due to the fact that traded products were essentially live animals and that the financing of operations is based on informal agreements among the different actors, this commodity system flourished, even escaping state control. This posed a problem for other commodity sectors such as cereals. However, this informal, traditional system, while well-adapted for live animal exports, is not well-adapted for red meat exports.

An economically viable red meat export sector must have the capacity to penetrate and secure market share in targeted export markets, i.e. it must be competitive in terms of price, timing, and quantity while conforming to generally recognized and accepted product norms and quality standards. It must be capable of managing costs throughout the marketing chain, having the capacity to reduce costs while maintaining quality to ensure a competitive edge. It must have well-developed rearing and processing infrastructures, adequate conservation, and logistical capacity and formal relations with financial partners to ensure a continual flow of capital to re-invest and improve production efficiency and product marketability.

The development of a red meat export sector requires proof that markets can be penetrated, market share can be maintained and/or increased over time, and that operators are capable of effectively managing export-related businesses. Within this context TradeMali's strategy for the red meat export sector, as well as for its other targeted agricultural export products, is first and foremost market driven. Secondly, Malian exports must be capable of conforming to specific export market demands in terms of quality, quantity (norms and standards), and price. And thirdly, it must be demonstrated that Malian meat is competitive in the targeted market segments. These underlying principles have and will continue to guide the elaboration and implementation of TradeMali's red meat export program.

Shea butter production has also been examined, since production systems and quality seem to be the two major factors hindering exports. Meetings have been conducted with several women associations, NGOs, and governmental organizations supporting the shea commodity chain.

The competitiveness of Malian rice in the sub-region remains problematic. High production, processing, and transportation costs combine with an unfavorable exchange rate to produce a rice that is as much as double the price of Asian rice.

A related activity in the rice sector is the "Crédit Stockage Vivrier." Small producers face a quandary at harvest time – sell their crops at low prices to pay off their debts or hold the crops until prices are more attractive but gain the reputation of being a bad credit risk. A potential solution is to secure a bridging loan that would be due at a date when market prices are better. Financial institutions, however, normally require a type of repayment guarantee which small producers do not usually have. During the previous USAID program, CARE/Mali and a local microcredit institution successfully experimented with a credit guarantee activity with production associations in Djené using stored rice as the repayment guarantee. TradeMali is expanding this activity. Producer groups would increase their incomes by selling at a more appropriate time and the storage facility would serve as a bulk buying center for merchants interested in purchasing significant quantities of rice for export or sales on the domestic market.

The analysis of various supply chains (logistic corridors) is ongoing. On the Bamako-Dakar-Europe route with Transrail, transit times are lower by up to 72 hours. However, freight costs through Dakar are significantly higher compared to those quoted in Abidjan or Tema (Ghana) by other transporters (DELMAS-SDV, CrossLinks, Ivoire Logistique). For the time being, MAERSK is the only supplier of reefers in Mali and the lack of competition is painfully noted. For example, freight costs cited by MAERSK Côte D'Ivoire between Abidjan and Antwerp are estimated at 2,450 euros while freight costs quoted by MAERSK MALI between Dakar and Antwerp are 3,800 euros. This is a major bottleneck, which TradeMali is actively trying to solve with several transporters. Although exporting through Dakar seems a cheaper way for Bamako exporters (who generally send air shipments) and a better alternative for the companies based in Sikasso (which up to now were using the Côte d'Ivoire routing) given that the political situation has not significantly improved since last year; the cost issue is of major concern. In this context, Tema and Abidjan – despite add-on costs due to road blocks – are still better options.

For mango exporters, infrastructure constitutes another major. The only packing station in Bamako of significant size does not have pre-cooling facilities or loading docks, although it houses a 120 MT cold storage room. Furthermore, there is no central EDM power supply to the station, and the generator is broken. This packing station is large enough to accommodate several exporting companies, but investment is required. TradeMali is working with the packing station to devise a minimal cost rehabilitation plan for the coming campaign. Conditioning would be done manually. In Sikasso, there is only one station that has the capacity to process mangoes mechanically and thus large quantities of fruits for export (more than 1,000 MT). All other “packing stations” are principally sheds minus the minimum infrastructure.

Financing is yet another bottleneck. As of today few mango exporters have ordered packing inputs (cartons, stickers, and pallet materials) and even fewer have readied the financing required to buy the fruits.

As for *capacity building at the level of exporting enterprises* (Activity 4.2), terms of reference have been prepared to bring in a mango specialist to assist Malian exporters to prepare the 2004 campaign, increase their exports by sea freight and air shipments, and implement better quality fruit collecting, conditioning, packing and shipping systems, while training trainers for follow up and dissemination. A first mission is planned at the beginning of March to assess, prepare, and plan technical assistance activities that will take place between March and July (four 10-day missions).

TradeMali is also assisting several groups of exporters to organize commercial prospecting missions.

Contacts and discussions are taking place with Mali Finance to evaluate investment projects in the targeted and related commodity sectors proposed by individual companies or groups of exporters.

Table 4. Planned and Realized Activities for PR 4 (Sept. 2003-Feb. 2004)

PR 4	Planned during period	Actual	Results	Comments
	Activity 4.1.1: Assess export markets (demand)	Mango: Senegal and Europe; Potato: Senegal; Red meat: West and North Africa	Export markets better understood (mango, potato, red meat); Due to logistic and animal health issues, major markets were initially restricted to the sub-region	Logistical problems need further clarification in terms of detailed costs and alternative export corridors
	Activity 4.1.2: Analyze product supply and barriers to trade in existing and potential markets	Efforts focused on defining cost structures, logistical routing, quality, and quantities to be exported	FOB costs Bamako are too high and must be reduced to be competitive Comparative analysis of freight costs (MAERSK, DELMAS-SDV, CrossLinks, Ivoire Logistique)	Speculation drives agricultural prices – sales need to be pro-rated in terms of volume, i.e. small unit margins
	Activity 4.1.3: Assist exporters (real time exportations) – existing and new exporters; Existing and potential markets	Identification of importers, transporters, technical exports; Assistance to market testing (samples, logistics, sampling, procurement)	Potato market test in Senegal resulted in one order of 16 MT; Orders expected to follow from other importers	Price not competitive due to high production and transportation costs
	Activity 4.1.4: Organize workshops on campaign results <i>Not planned in the period</i> Activity 4.1.5: Design Action			

PR 4	Planned during period	Actual	Results	Comments
	Activity 4.2.4: Prepare commercial missions	Mission to Senegal for potato and mango exporters Market information provided for trips to Congo, Gabon & Ghana	Two trips to Ghana undertaken by private exporters and a trip to Congo planned for April (financed by operators)	It is important to provide clients with basic market information and potential contacts before they travel – price in many costal markets low
Activity 4.3: Put in place/ support (<i>Concertation</i>) frameworks per filière	Activity 4.3.1: <i>Not planned in the period</i>	Initial discussions held with potato, mango, and livestock partners		
Other Activities	Crédit Stockage Vivrier (CSV)			
1	Information collection and training	Presentation of the crédit stockage vivrier rice/paddy activity to technical assistance services, NGOs, associations, and agricultural cooperatives in the production areas of Djenné, Mopti, and Segou Identification of potential producer organizations Feasibility study of the CSV in these areas	Five village associations are currently engaged in the CSV activity in Djenné. Considerable interest on the part of other rice producers and NGOs 29 producer organizations identified A feasibility study for financial institutions review	
2	Negotiation with financial institutions	Meeting between BNDA, Nièsigiso, and CAEC; Drafting and signature of protocol agreement with CAEC	Protocol agreement signed with CAEC extending to 21 producer associations in Djenné; Amendment (3/15/04) signed extending to eight associations in ORS	

E. PR 5 Improved Partnerships for Selected Agricultural Product Exports

Under PR 5, TradeMali aims to (i) assist Malian exporters in negotiating contracts and formalizing the agreements between themselves and their importers and suppliers – mainly their commodity producers and transporters (Activity 5.1) – and (ii) follow up contract implementation (Activity 5.2): support to operations according to “cahiers des charges,” analysis of profitability and campaign results, and information dissemination.

Since September, the following contract models have been prepared and submitted to exporters for discussion:

- Contract importer– exporters;

- Contract with transporter (i.e. MAERSK);
- Contract for technical assistance; and
- Agreement between TradeMali and various partners.

As for the follow up of contract implementation, the shipment of potato samples to Senegal was the occasion to validate and characterize the demand (opportunities and threats) and the supply side (strengths and weaknesses of potato exporters) along with three key parameters of competitiveness: quality and availability of product, price, and logistics.

Table 5. Planned and Realized Activities for PR 5 (Sept. 2003-Feb. 2004)

PR 5	Planned during period	Actual	Results	Comments
Activity 5.1: Support contract negotiation	Activity 5.1.1: Elaborate export contracts	Sample contracts provided to exporters; Cost structures being developed to generate profitability	No potato contracts negotiated, generally not price competitive	Working on the cost structures, yields, quality, and logistics is necessary to make Malian products competitive
Activity 5.2: Follow up contract implementation	Activity 5.2.1: Support export operations *	Potato export tests to Senegal; Preparations for mango export season		
	Activity 5.2.2: Analyze results and conduct workshop <i>Not planned in the period</i>			
	Activity 5.2.3: Disseminate information <i>Not planned in the period</i>			

* Next steps

During TradeMali's strategic planning activity, a thorough analysis of target commodity chains has been conducted: potentialities, promising markets, actors, and SWOT. Also, an in-depth evaluation of the business environment was done: institutional, supply and demand, infrastructures and logistics, and export partners. This step is paramount to know the barriers to trade for Malian products and initiate adequate measures to foster the development of exports.

The exportation of target products will require considerable effort on the part of suppliers and exporters to re-evaluate their cost structures and accept lower than traditional unit margins to initially penetrate targeted export markets. In addition, the GOM needs to strengthen its phytosanitary and sanitary regulatory procedures to ensure compliance with WTO and UEMOA norms and standards, as well as promoting Malian exports to new markets through the negotiation of bi-lateral agreements.

Efforts for the upcoming semester will focus on completing total product cost structures for targeted markets and export corridors and discussing with operators how cost reduction can be achieved. Final preliminary assessment of at least three targeted export markets will be completed and commercial missions will be undertaken as a prelude to export initiatives.

F. PR 6. Improved Capacity of Market Information Systems for Selected Agricultural Products (e.g., OMA)

TradeMali uses a “filière” approach to realize project objectives. This implies that the supply chain of a targeted product is informed, involved, and finally committed to improving the quality of the product and the logistics needed to get it to market. It also includes providing a competitive price for the commodity exported. Determining price competitiveness is based in part on the accessibility of market prices to all actors in the supply chain. As import prices fluctuate frequently, timely information on market prices is critical to actors in the chain.

During the reporting period, TradeMali approached two types of organizations: those involved with gathering and delivery of information system (Activity 6.1). Those consulted were OMA, CESP, ORTM, ON, DNCC, and CLIC. The other types of groupings were consumers and beneficiaries of market data and information systems (Activity 6.2). This included agroenterprises, professional associations, women’s groups, and service providers. The results of these consultations increased project awareness for the need to improve the organizational structure of the communications delivery systems and to improve content quality of the information disseminated.

The medium-term strategies developed for the information gatherers and deliverers includes upgrading equipment for some, expanding the scope of market intelligence for others, and upgrading skills for another set. The technical support will be delivered or coached through local service providers. Strategies for the consumers of information include strengthening the business groups through a series of professional *rencontres* and *filière* events that allow members and officers to identify their position within the supply chain. The strategy developed also includes assigning an *expert junior* to the business groups when one is requested within the context of institutional strengthening. The *expert junior* will accompany the organization in their programs to provide member services such as market information and appropriate training modules. An assumption of the strategy is that these structures and organizations can charge a fee to their members for such services more easily than public agencies. If the assumption is correct, it increases the chances that the information delivery can become a more sustainable activity.

Table 6. Planned and Realized Activities for PR 6 (Sept. 2003-Feb. 2004)

PR 6	Planned during period	Actual	Results	Comments
Activity 6.1: Capacity building among information institutions	Visit, meet with, and discuss ways to reinforce structures	Met with service providers, associations, and several radio stations Conducted IT needs assessment for DNCC	Informed potential partners of our BDS approach Formulated basic strategy.	Need to conduct additional visits with rural radios. Coordinate with ComDev and URTEL
Activity 6.2: Improving information products	Improve information products Information workshop for service providers	Reviewed existing audio visual material Joint workshop held with Mali Finance	Prepared adaptations for export use Transfer of critical information on best ways to succeed in project public tenders	Need to complete review of existing ON and DNCC Web sites and their information journal Need to conduct similar events in regional capitals, equally with Mali Finance
Additional activities		Working sessions with OMA on ways to expand breadth & scope of their market information Scheduled weekly working sessions between our Ségou office and the Agri-business Cellule of the Office de Niger	Written offer and budget by OMA for collaboration to collect mango, rice, and potato market info in Mali and sub-region Traced a framework to work with the Cellule to organize a mini-agricultural fair in Ségou	Negotiate and reach agreement based on proposed SOW and budget Cellule needs to be more available and/or staff increased

G. Cross-cutting Issues

G1. Gender

G1a. Activity 1: Activities of TradeMali's Gender Committee

In Mali, certain agribusiness and agricultural sectors are privileged areas of intervention for women. This is the reason why TradeMali has placed considerable emphasis on women and women agroentrepreneur associations in its intervention strategy.

During the past six months, a major activity was the establishment of a gender committee to better address women agroentrepreneurs' concerns and to ensure their active participation in project activities. We also adapted the performance indicators of the gender component to the new indicators identified for the project.

The first meeting of the TradeMali Gender Committee and the TradeMali team, held in January 2004, achieved its aims, as it helped committee members better

understand the objectives and operations of TradeMali and helped set up the basis for collaboration between the project and the committee. Thus, the roles and terms of reference assigned to the committee were more specifically defined. The members committed themselves to actively participating in all of the committee activities.

G1b. Activity 2: Organizational Support to Women's Associations and Groups

The first six-month period of the project was essentially devoted to the assessment of women's agricultural activities, agroenterprises, and their associations to further define the nature of TradeMali's interventions with these target groups. Since September 2003, the project conducted a series of meetings both in Bamako and in the Office du Niger area with the following:

- The network of women rice processors at the Office Riz Ségou;
- The network of women processors at the Regional Directorate in charge of the Promotion of Women of Ségou;
- The association of women agro-food processors (ATRAPAL); and
- Various resource people.

These meetings helped achieve the following:

- Identify the sectors and post-harvest activities in which women are the most numerous actors;
- Assess the capacity-building needs for women's agroenterprises and women's associations;
- Assess the women agroentrepreneurs' interests in the TradeMali project;
- Select the members of the gender consultative committee.

Table 7. Planned and Realized Activities for Cross-cutting Activities (Sept. 2003-Feb. 2004)

Gender	Planned during period	Actual	Results	Comments
Activity 1: Activities of the gender committee	Put into place a gender <i>Comité Consultatif</i>	Developed terms of reference for the committee; Established its role and organized the first meeting, as planned	High professional quality of committee members, with broad experience; Each expressed their engagement and commitment to help guide the project's gender component	Members requested to be kept informed of project activities. TradeMali will seek additional guidance from Mission's gender specialist.

Gender	Planned during period	Actual	Results	Comments
Activity 2: Organizational support to women's association and groups	No activity scheduled during first semester	Established contacts and conducted assessment of three women's associations and networks	Identified two generic-type enterprise management training products and a technical training module for mango supply chain	This is also an area we will seek input and recommendations from the Mission's gender specialist If the model proves successful, TradeMali would like to share its experience with other USAID projects

G2. Northern Initiative

An office – with a regional technical coordinator and monitoring and evaluation and administrative staff – was established in Timbuktu at the start of the project. During the semester, the project team initiated the Crédit Stockage Vivrier (CSV) activity, pursued contacts with the business and agribusiness community, and identified potential export commodities.

G2a. Crédit Stockage Vivrier

During the semester, TradeMali took significant steps to enact this program in the Timbuktu region (as well as in the Ségou areas, and to reopen and expand in the Mopti/Djené areas). This strategy was presented to the technical services, NGOs, associations, and agricultural cooperatives in rice production zones and to various financial institutions. During these information and awareness-raising meetings, the capacity and credit worthiness of the producer organizations and their needs – relating to the export of rice and other agricultural products – were assessed. Constraints identified include: customs barriers, the lack of marketing outlets, and the “forced” sale of commodities at low prices during the harvesting period. TradeMali, Mali Finance, and Africare are participating in the CSV in the Timbuktu region.

G2b. Business Forum

In preparation of the business forum, TradeMali did a preliminary evaluation of the eight rural radio stations in the Timbuktu region and the sole functioning cybercafé. The best performing are located in the districts of Timbuktu, Diré, and Niafunké. Those located in Rahrous and Goundam have only limited coverage.

The business forum will bring together the operators, other service providers, and agroenterprises to identify and plan activities to be implemented in view of overcoming the major constraints related to product marketing.

G2c. Alternative Products

As part of the efforts to identify other alternative products in the Northern regions, anis, cumin, and handicraft products were targeted. Anis and cumin are two spices that are cultivated exclusively in the districts of Diré and Goundam in the Republic of Mali and they allow for a fruitful trade between Mali and other countries in the region, including Côte d'Ivoire, Niger, Togo, Ghana, Benin, and Nigeria. The spices often are sold at prices that are three times higher in foreign markets than in local ones. These products are transported from the production areas by pinnace to Mopti and/or Gao and then by truck to the regional markets. Production of these spices is on the increase as a replacement for wheat.

Camel cheese and dairy products are produced in an informal manner in the Kidal region. TradeMali has had several planning meetings with a group that is attempting to professionalize the production and secure export markets in North Africa. A major obstacle is the group's lack of capital for start-up activities and the likelihood that financing will be a continuous and serious problem.

The quality of handicraft products is improving especially when designed for foreign markets. However, artisans have difficulties penetrating these markets due to the lack of contact with the potential buyers. Currently, the most important clients are the tourists. TradeMali will continue to explore the feasibility of assisting this filière, perhaps through assistance to existing NGOs and organizations already involved in the trade.

During the next semester, the project will be officially launched in the region of Timbuktu, simultaneously with the organization of the business forum workshop. Implementation of the CSV and the identification of groups will be pursued, as well as the prospect of the anis and handicraft product subsectors. The table below summarizes the activities and tasks as implemented according to the Northern Initiative Chronogram presented in Annex A of the Work Plan.

Table 8. Planned and Realized Activities for the Northern Initiative (Sept. 2003-Feb. 2004)

Activity	Planned during period	Actual	Results	Comments
Activity 1: Crédit Stockage Vivrier (CSV)	Activity 1.1: Information collection and training	Presentation of the crédit stockage vivrier rice/paddy activity to technical assistance services, NGOs, associations, and agricultural cooperatives in the production areas of Timbuktu Identification of potential cooperatives Feasibility study of the CSV in these areas	Considerable interest on the part of rice producers and NGOs Eight are identified in Timbuktu A feasibility study for financial institutions review	The producer organizations have stocks and are seeking support from TradeMali to identify domestic and export markets
	Activity 1.2: Negotiation with financial institutions	Meeting between BNDA, Nièsigiso, NGK- Niafunké, Africare (in Goundam and Timbuktu); Drafting and signature of protocol agreement	Synergy with the Africare microfinance project (ISAG and IFMT) to finance the CSV in Timbuktu	IFMT is a partner of Mali Finance & will likely finance producer organizations in the Commune of Bourem Inaly. A stock of 126 tons of paddy rice will be financed for seven months, using a guarantee value of 70% of current market price
	Activity 1.3: Visits, negotiations and contract with village associations	Presentation of the "crédit stockage" activity to and analysis of producers groups in the Timbuktu region Contract negotiations with the cooperatives	Eight cooperatives are identified in Timbuktu	The cooperatives in Bourem Inaly and Koura are stocking their paddy
Activity 2: Professional Meetings	Activity 2.1: Preparation of the business forum in Timbuktu	Inventory of operators, agroentrepreneurs, and local service providers Development of the terms of reference	Underway	This forum will be held at the same time as the regional project launch
	Activity 2.2: Invitation to tender, selection, contract awarding	Meetings will be held in second semester		
	Activity 2.3: Communi- cation and organization	Meetings will be held in second semester		

Activity	Planned during period	Actual	Results	Comments
Activity 3: Training/ Assistance	Activity 3.1: Assessment of operators' needs in the region	Identification of constraints to the export of target products by operators in the region Collection of information on rural radio stations and Internet providers/ cybercafes	Constraints identified Information collected	
Activity 4: Commercial Prospects	Activity 4.1: Northern handicraft products	Information meeting with the regional guild chamber	Existing needs for logistical support identified	Further investigation and analysis required
	Activity 4.2: Anis	Information collection at the SLACAER and from major anis producers and exporters Planning of the anis promotion day	Increasing production of anis and cumin; Varieties grown; Existence of traditional marketing network, export corridors identified	Formulation of an assistance strategy
	Activity 4.3: Camel cheese	Prospects in the production areas; Meeting with the Camel project	Lack of sizeable formal production; Possible marketing opportunities in the Maghreb; Planning schedule developed	Promoters have limited financial capacity to undertake required tests

H. Special Activities

H1. Promotion of Synergy between the Finance, Production, and Trade Projects and with other USAID Projects

TradeMali targeted three levels in promoting synergy among other projects: a) the *strategic level* where collaboration and interaction with other projects are critical to realize both its numerical targets of exported agricultural commodity and the targets of the other institution; b) the *highly needed level*, which covers shared and complementary resources that move USAID's development objectives. Synergy is realized through leveraging, information sharing and expanded communication links within the development community; and c) the *desirable and often overlooked level*. This synergy level is sought from projects of vastly different horizons and client base. As synergy is not evident at the outset, it requires some digging, brain storming sessions, and exploratory discussions to identify a project activity that fits the interest of the other.

H1a. Strategic Level

For TradeMali's filière approach and focus on post-harvest involvement to reach objectives, it was critical that the project establish interactive collaboration with USAID's Finance and Production projects as well as other agricultural sector support programs. It became critically evident during the reporting period that to reach export figures, TradeMali's clients needed to access the services of an

investment and capital financing structure. From initial start-up, TradeMali established close working and planning ties with Mali Finance at the management and technical levels. The same synergy is in the making with Mali Production. The TradeMali team established a list of topics it will propose to the Mali Production Project related to types and varieties of potatoes seeds planted, the availability of certain windows of opportunities for mango exports, and quality standards requirements for sesame. With non-USAID support institutions, TradeMali established an accord to jointly organize mango quality handling training with the Swiss HELEVETAS project. In the shea butter filière, TradeMali and AFE established a regular schedule of monthly meetings since October 2003 that have resulted in developing a common strategy to identify, certify, and work with women's organizations and exporters. Meetings were also held with the designers of the new World Bank and CIDA agricultural projects to anticipate areas of collaboration.

H1b. Highly Desirable Level

TradeMali focused its activities at this level through exploratory discussions with CLIC and the manner by which their system of information gathering and dissemination could assist in providing market information in zones close to commodity production. Contacts were established with URTEL and ComDev to obtain information that permitted TradeMali to develop a rural radio strategy including one to assist rural radios that want to become sustainable service providers.

H1c. Desirable and Overlooked Level

Following USAID's November partner fair, TradeMali explored ways to include Helen Keller International's nutritional message as part of an information point at *rencontres professionnelles* organized by TradeMali. Helen Keller International was invited and distributed information about the project at the jointly organized TradeMali/Mali Finance *Atelier d'information* (December 2003) for service providers. We will continue in the same vein to display the HIV/AIDS information series "Scenarios of the Sahel," currently available on CD ROM, to be shown at TradeMali professional events and training sessions. TradeMali held preliminary discussions with the ATN project, whose health objective is to make people aware of the importance of washing hands. Within the new context of exportable commodities, new hygienic and health standards required by European imports now mandate that food processors wash their hands. We thus identified a common ground to jointly promote hand washing.

In light of Mali's large geographic area, difficulties in transportation and high illiteracy level affect all development projects. In subsequent semesters, TradeMali will continue to seek synergy with health, education, and governance projects through its emphasis on audio and visual communications.

Table 9. Planned and Realized Results for Special Activities (Sept. 2003-Feb. 2004)

Synergy	Planned during period	Actual	Results	Comments
Activity 1: Promote project services	Joint BDS workshop with Mali Finance	Joint workshop held	Informed BDS suppliers of project approaches	Joint training sessions and workshops with selected BDS providers is envisioned
	Joint project launch (Bamako) with Mali Finance	Joint project launch held	Partners informed of project approaches; New contacts made	Regional joint project launches will be scheduled
Activity 2: Information day for selected sectors	<i>No activities planned for the period</i>			
Activity 3: Synergy with Mali Finance	Support in development of project documents	Joint planning sessions and internal presentation with Mali Finance	Collaborative activities in both project work plans; Advice on promotional materials	Continue joint planning sessions as preparation for Year 2 work plan
	Joint support to rice credit storage activity	Presentation to producers; Evaluation of producer association needs; Evaluation of credit proposal; Presentations to financial institutions	Agreement with Djenne microfinance institution to expand activity in Djenne and beyond	Discussions are continuing with interested financial institutions in Segou, Mopti, and Timbuktu; Eventual exploration of other geographic areas and other commodities
Activity 4: Synergy with Mali Production	Information sharing with Mali Production	Initial discussions with Mali Production chief of party and staff on TradeMali work plan, strategy, and targets	Mali Production has better understanding of the commodities and potential synergy areas; TradeMali has an initial view of the Production type of activities	Approved work plans and PMP will be shared. Meetings between technical staffs and chiefs of party will start once Production team is in country
Activity 5: Participation in three party meetings	Three-party meetings with Finance, Production, and Trade chiefs of party	Separate meetings with Finance and Production chiefs of party	Appreciation of planned activities, strategy, and collaborative areas	Three-party meetings will start once Production project begins
Activity 6: Communications component	Establishing relations & collaboration in communication activities	Discussions with ComDev, its CLIC and GEEK projects, and other USAID projects on strategy, materials, and resources	Agreement in principal to provide CLIC project with media developed by Trade and relevant CAE material; Utilization of CLIC centers as training sites	Continue discussions with GEEK project on short-term computer assistance to Trade clients

I. Monitoring and Evaluation Activities

Development of the performance monitoring plan required considerable time and effort. Numerous meetings were held with USAID and project partners to develop and refine the indicators and targets. Baseline data was collected from the DNSI, CPS, OMBEVI, OMA, and DNCC. The information collected, though from official sources, was judged as not being wholly reliable – by the Mission – and,

in certain cases, was incomplete. Information from exporters and their organizations was added as a means of verification.

A draft PMP was submitted to the AEG team in early December and a second draft in February 2004. As of this writing, further baseline data collection from exporters is being carried out at the request of the AEG team. At the same time other collection efforts concerning project implementation and impact are underway.

Given the issues surrounding reliable data sources, an information and exchange workshop was held at TradeMali. This workshop brought together the regional project monitoring and evaluation staff, the CARE's monitoring and evaluation supervisor based in Bamako, the monitoring and evaluation specialist from Mali Finance project, TradeMali's capacity building specialist (BDS) based in Ségou, and TradeMali's monitoring and evaluation specialist. The workshop addressed data collection and reliability concerns and helped to prepare a detailed activity schedule for the Monitoring and Evaluation Unit.

Table 10. Planned and Realized Activities for the Monitoring and Evaluation Unit (Sept. 2003-Feb. 2004)

Activities	Planned during period	Actual	Results	Comments
Activity 1: PMP development	PMP system designed and in place	Draft PMP developed and submitted to USAID Workshop with partners on PMP, held February 19-20, 2004	USAID requested revisions in document, indicators, and targets	Revised draft submitted in February; USAID requested additional changes and data collection; Final PMP will be submitted by end of March
Activity 2: M&E system development:	Monitoring & evaluation system designed and in place	Manual describing system developed; Staff hired, trained, and in place; Baseline data collection carried out; Collection of first semester results underway	M&E system in place; All TradeMali technical team members are and feel part of the M&E team	
Activity 3: Data collection & analysis	Initiate data collection and analysis	Started since October 2003 and continuing	USAID requested verification of baseline data and increased number of sources	Additional data being collected to control/verify baseline information
Activity 4: M&E reports	M&E report due at end of first semester	Information being collected		

SECTION IV

First Year Work Plan Project Deliverables

DELIVERABLES 2003 - 2004									
PERFORMANCE RESULT									
CLIN 0001 - Improving the Policy and Institutional Environment for Trade and Investment, plus Contract Management									
Deliverable #	Deliverables	Responsible Units	Indicator	1st Quarter Sept 03 -Nov 04	1st Quarter Sept 03 -Nov 04	2nd Quarter Dec 03 -Feb 04	2nd Quarter Dec 03 -Feb 04	3rd Quarter Mar-May	4th Quarter Jun-Aug
				Target	Actual	Target	Actual		
TECHNICAL DELIVERABLES									
Public-Private Forum/Workshops									
			PR 1,2,6						
1	Project launching in Bamako	Team				X	X		
2	Reduction of import duties on marketing inputs	Pol						X	
3	Reduction of import duties on utility vehicles	Pol						X	
4	Business Forum in Timbuktu	BDS						X	
5	Gender Forum	BDS							X
6	Quality management	BDS/TL						X	
7	Creation of Gender Committee					X	X		
8	Creation of Advisory Committee							X	
Studies Complete									
			PR1,2,4	No Studies planned for period					
9	Evaluation of <i>karité</i> filière	Team						X	
MANAGEMENT DELIVERABLES									
10	Bamako office in operation	Admin		X	X				
11	Regional offices in operation (2)	Admin		X	X				
12	PMP submitted	M&E		X	X ⁽¹⁾				
13	Semi-annual reports submitted	COP						X	
14	Annual Work Plan submitted	COP				X	X ⁽¹⁾		
15	Arrival of key personnel (4)	Admin		X	X				
16	Annual report prepared for submission	COP							X
17	Team building workshop	Admin		X	X				
PERFORMANCE RESULT									
CLIN 0002 - Increasing and Diversifying Malian Exports and Export Markets									
TECHNICAL DELIVERABLES									
Workshops									
			PR 5						
18	Evaluation of Mango operation	TL/BDS							X
19	Evaluation of Potato operation	TL/BDS						X	
20	Evaluation of red meat operation	TL/BDS							X
19	BDS Service Providers workshop	BDS				X	X		
Operational Studies									
			PR 3, 4, 5	No Operational Studies planned for period					
20	Mango operation and competitiveness study	TL							X
21	Potato operation and competitiveness study	TL						X	
22	Red meat operation and competitiveness study	TL						X	
Technical Training Courses									
			PR 3,4,5	No Technical Training Courses planned for period					
23	Technical skills for exporting firms (potatoes)	TL/BDS						X	
24	Technical skills for exporting firms (mangoes)	TL/BDS						X	
25	How to be ready to receive buyers' tours and missions	TL/BDS						X	
Buyers Tours									
			PR 3,4,5						
26	Outgoing sellers tour to Senegal	TL		X			X		
TL = TradeLinks; BDS = Business Development Services; Pol = Policy; M&E = Monitoring and Evaluation									
Notes: Draft submitted									

First Semester Performance (PMP) Indicators

INDICATORS	Semester 1	
	(September 03 - February 04)	
	Target	Achievement
PR 1 Improved capacity of export promotion institutions (e.g., DNCC)		
SubIR2.1.1 Number of commercial policies for selected agricultural products recommended for adoption	0	0
SubIR2.1.2 Number of commercial agreements successfully negotiated by Mali at the regional and/or international level	0	0
PR 2 Improved Public-Private partnership for export promotion		
SubIR2.1.3 Number of policies or regulations influenced by professional associations in favor of the export of selected agricultural products	0	0
SubIR2.1.4 Percentage of reduction of the number of barriers in selected corridors	0	0
PR 3 Reinforced capacity of norms and standards dissemination institutions (e.g., DGRC)		
SubIR2.2.1 Number certification institutions for compliance of agricultural export products recognized at the regional and/or international level	0	0
SubIR2.2.2 Number of agricultural product quality certification delivered	0	0
PR 4 Improved opportunities for the export of selected agricultural products		
SubIR2.2.3 Number of new markets accessible to selected Malian products	0	0
SubIR2.2.4.1 Number of post-harvest and/or processing technologies introduced and adapted the associations and agro-entrepreneurs	0	0
SubIR2.2.4.2 Number of storage, conservation and marketing facilities for selected agricultural products	0	0
SubIR2.2.9 Percentage of increase of the volume of financing for commercial activities, including exports	0	0
PR 5 Improved partnership for the export of selected agricultural products		
SubIR2.2.5 Number of contracts between exporters and producers for selected agricultural products	0	1

SubIR2.2.6 Number of contracts resulting in commercial transactions for the export of selected agricultural products	<i>0</i>	1
PR 6 Reinforced capacity of market information systems for agricultural products (e.g., OMA)		
SubIR2.2.7 Percentage of increase of the number of radio announcements about markets for Malian agricultural products	<i>0</i>	0
SubIR2.2.8 Percentage of increase of the number of Internet sites on Malian agricultural products	<i>0</i>	0

ANNEX A

Members of TradeMali Gender Committee

No.	Noms	Titres	Institutions
1.	Konaré Nafissatou Guindo	Conseiller Technique	Ministère Délégué Auprès du Ministère de l'Economie et des Finances Chargé de la Promotion des Investissements et du Secteur Privé
2.	Mariko Fadima Siby	Directrice	UCODAL
3.	Mme Haidara Mariame Fofana		Projet Karité
4.	Lansry Nana Haidara	Conseiller Technique ; Chef de Cellule des Infrastructures et des Filières Agricoles	Présidence de la République
5.	Nana Kéita		La Maraichère, ATRAPAL
6.	Mah Tamboura		SEPROSEV
7.	Traoré Kadiatou Soucko	Présidente	REFAO
8.	Konté Binta Bocoum		Appui au Groupement des Femmes Productrices de Karité
9.	Mouye Sanogo	Directrice	Tanty Solde

ANNEX B**BDS Workshop Participants**

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			face météo		
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