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BOTSWANA CONFEDERATION OF COMMERCE, INDUSTRY AND MANPOWER

Botswana Private Enterprises Development Project (BPED)

**PILOT STUDY TO DETERMINE INVESTMENT OPPORTUNITIES IN
SELECTED VILLAGES**

KASANE

Under the:
Botswana Private Enterprise Development
Project (BPED)
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1. INTRODUCTION

1.1 Background to the Study

This project was commissioned by the Botswana Confederation of Commerce, Industry and Manpower (BOCCIM), in association with the United States Agency for International Development (USAID).

1.1.1 BOCCIM is concerned about the continuing rural-urban migration and the decreasing employment opportunities in urban areas due to the economic down - turn, while at the same time economic activity in rural areas remains low, and characterised by destructive competition and overtrading. BOCCIM has therefore set out to stimulate the establishment of viable businesses in rural areas in order to increase the level of rural economic activity, thus creating jobs in rural areas. Kasane and Tsabong were selected for the pilot project, and studies were carried out concurrently in the two villages. Hopefully the findings and experiences of this and the Tsabong study will provide useful lessons for the subsequent studies to be undertaken in the rest of the selected villages in Botswana.

1.2 Terms of Reference

The Terms of Reference of the study describe the scope of work as follows:-

To make a survey of resources in each village

To analyse the demographic situation in each village

To interview officials of both the central and local government and others to determine existing supply/demand gaps

To determine relations between locally based financial institutions and the villagers

To identify the numbers and categories of enterprises in the village

To determine the levels of private sector employment in the village

To determine volumes of products being produced in the village, if any

To draw a sketch map of the village and indicate business locations

To identify feasible new projects in the village

The desired results of the the study are specified as follows:-

To submit a report with project profiles specifying the following:

- Nature of project
- Financial aspects
- Possibility of FAP or other financial support
- Estimated employment to be created
- Technical and professional expertise required
- Identify any training required

While the Terms of Reference specifically refer to Kasane Township, it became clear as the study progressed that it would not be realistic to restrict the study to Kasane alone. The geographical proximity of Kasane and Kazungula, and the interrelationships between Kasane and its hinterland, including the so called 'Enclave', is such that one must of necessity treat the Chobe region as a single ecological and economic planning entity.

2. METHODOLOGY

After the initial meeting with the BOCCIM Business Council Chairperson, Mrs Carr-Hartley, the consultant was introduced to various Central and Local Government officials in Kasane, starting with the District Commissioner, Mr Soblem T. Mayane, the local Court President, Kgosi Kadimo and his Deputy, Kgosi Sabutha, the Acting Assistant Council Secretary, Ms Kgopo, Councillors Sankwasa, Sinvula and Nshimwe, the District Officer Lands, the Regional Immigration Officer, Council Physical Planner and Commercial Officer, the Land Board Chairman and Secretary Messrs Dick George and Kgari respectively, and various business personalities in the Township.

This was followed by a meeting with the Business Council on 15/08/95, at which the consultant explained the ToRs as contained in the project document, and to further get guidance from the local business community as to how best the assignment should be tackled, and also to identify the areas of concern that the local business community feel affect investment in the area.

Between August 14 and August 21 the consultant interviewed all the officers listed above, and several other local and expatriate entrepreneurs to determine the existing business, the general

constraints facing entrepreneurs in their efforts, and to solicit views on the types of projects they feel could be started in the village and be profitable to the investors. A meeting was also held with representatives of the local Village Development Committee, the Parent Teachers Association, the Village Health Committee, the Red Cross and the Botswana Council of Women. The names of those interviewed and the businesses they run are listed in the acknowledgements section of this report. A final meeting with the Kasane BOCCIM Business Council was held on August 22 at which the consultant reported on progress and some of the findings, and sought further input of the Business Council members.

Besides the personal interviews, each person interviewed was also requested to complete a questionnaire (Appendix 3). Informal discussions were also held with members of the public whose names have not been listed above, but whose inputs have been taken into account in producing the final recommendations. The proposals contained in this report reflect the views of the cross - section of Kasane residents interviewed during the study. While co-operation was quite high, a few of the survey participants who are already involved in business were rather reluctant, perhaps justifiably so, to share their views because they feared that their project ideas would be passed on to investors with huge amounts of capital who would not only grab those ideas and implement them immediately, but would also, through the profits generated by such projects, eventually swallow up the local small businesses.

3. GENERAL ISSUES RAISED BY SURVEY PARTICIPANTS

3.1 Investment Constraints Identified by Survey Participants.

3.1.1 With one voice, all survey participants singled out three major constraints to investment within the village. First and foremost, the inavailability of land is considered the main stumbling block to investment in their area. Not only is it difficult to obtain land to develop for commercial purposes, it is also difficult to obtain residential land. As a result the prospective investor is faced with the difficulty of finding a place to live in. As land to develop is scarce, potential investors have to rely on rented space which in turn is very expensive because demand is far greater than supply. Examples were given where the frustrations over land forced would-be investors to seek alternative locations for their business, such as Maun, or to close down their operations altogether. Coupled with this there is the overall concern with the long and protracted procedures for land applications. Because Kasane is on "State land" allocations are handled by the Department of Lands in Gaborone, and planning permission is the responsibility of the Department of Town and Regional Planning, also based in Gaborone, hence the local authorities do not really make the important decisions when it comes to land matters. Furthermore, there are conflicting demands for land use between the 'Tourism-based' activities, which incidentally are the major economic activity in the township, and the local population. The township itself is relatively small in area and is sandwiched between the Chobe National Park, the Forestry Reserve and the Chobe River, leaving very little room for

expansion. As the government declared national tourist gate way to the north, land use policies with regards to Kasane have tended to favour the tourism industry to the detriment of the local population. This state of affairs is becoming and in future may become a serious source of conflict in the area. Information obtained from the Lands Office depicted the commercial and industrial plot situation in Kasane and Kazungula as follows:

<u>Kazungula</u>	No Serviced	Allocated	Developed
Industrial Plots	95	?	5%
Commercial	27	?	3
<u>Kasane Light Ind.</u>	21	All	Few
Commercial (CBD)	30	5%	Few
Low Cost	5	5	5
Plateau (Low Cost)	15	0	0

3.1.2 Another major constraint identified is Kasane's distance from the sources of supply for most goods, which inevitably raises the cost, and therefore price of goods, and the cost of living in general. Yet to operate profitably, businesses must recover all costs. With the economic down turn, the consumer's purchasing power has been considerably reduced, leading to a decrease in turnover, and therefore profits. As a result, some companies have had to close their Kasane operations because of dwindling profits.

3.1.3 A third and also very important constraint to investment in Kasane is the size of the market for consumer goods. According to the 1991 population census, Kasane proper had 4,336 inhabitants while the associated localities had 528 inhabitants, adding to a total of 4,934. As a matter of fact the whole of the Chobe had a total population of only 14,126. The size of the population is therefore such that it cannot sustain large scale ventures unless an external market is assured. Among the proposals put forward during the study was that for any business venture to succeed, it must of necessity be relatively small, multi - faceted, and not specialised, because dealing in a specialised item would soon saturate the small market.

3.2 Some concerns of the local community and non-tourism based businesses

3.2.1 Some of the survey participants expressed serious concern with the dominance of the Tourism industry in the economy of Kasane. The view expressed was that the Tourism industry, except for providing the few hundred jobs created by the lodges and safari companies, does not really benefit the majority of local residents and businesses. The type of tourist visiting Kasane does not buy from the local shops as they are transported from the Airport to the lodges and or campsites directly, without really 'living' in the township.

Secondly, the lodges and safari companies do not buy locally, but rather source their requirements directly from suppliers in Francistown, Gaborone or even South Africa. This further accentuates the market problem for local traders, forcing them to operate on a really small scale.

3.2.2 Closely related to that is the sentiment expressed that the established tourism - related businesses have tended to be overprotective of their kind, making it virtually impossible for new investors to break into the market. Unfortunately the association of the tourism - related industries in Kasane with a predominantly expatriate ownership tends to widen the gap between the indigenous community and the industry itself.

On the other hand, there are signs of determination and commitment on the part of the tour operators and others engaged in related economic activities in Kasane to see more involvement of the indigenous communities in the Tourism industry, and some proposals as to how this could be achieved are included under the subtitle **Suggested Projects Ideas**.

3.2.3 Some also expressed very strongly the view that the Tourism Policy is actually stifling development and denying locals of a source of income without providing an alternative means² of livelihood. The locals have traditionally subsisted on fishing and hunting, and for some, this provided sufficient income for them to live comfortably without having to seek paid employment. However, the current Tourism Policy prohibits commercial fishing and hunting around Kasane, hence the local population is denied this important source of income. To make matters worse, the prohibition policy has virtually passed on this income source to the communities of neighbouring states. Currently a very large proportion of fresh fish, the indigenous population's staple food, is provided by Namibians.

4. FINDINGS OF THE STUDY

4.1 Resources Available in Kasane

Kasane proper is not endowed with many natural resources, except for the Chobe River water and its fish, fertile soil, and people who would provide cheap semiskilled and unskilled labour. However, the hinterland has a wide variety of natural resources including wildlife, timber, river reeds, palms, clay, edible wild fruit such as 'motsintsila', thatching grass and other veld products. The Chobe Farms also produce fresh fruit, especially bananas, oranges and vegetables in abundance.

The availability of facilities such as serviced commercial plots, and utilities such as water, power, telephones and roads, the whole range of Local Government services, Immigration Customs and Labour Offices in Kasane also offer an advantage to the potential investor, as many operational decisions can be made locally.

4.2 The Demography of Kasane

As already stated at 3.1.3 above, the population of Kasane is relatively small. It can be divided into three distinct categories, which by - and - large correspond with geographical location, income level and, to an extent origins. The first category is the indigenous population found in Kasane 'village'. While there are no exact figures to show the age distribution, it can be safely assumed that a significant proportion of the Kasane 'village' residents are minors, with no regular source of income, or the elderly whose level of economic activity is very low. This population would therefore be largely unskilled or semiskilled, and unemployed or under employed. and according to the 1989 - 1995 District Development Plan, largely illiterate. The 1991 census shows an almost even male/female ratio. This population represents the permanent residents of Kasane, although some of them may still identify with their village of origin somewhere in the district.

The second category is that located in the 'Plateau' area. This population is made up largely of Central and Local Government, and private sector employees who generally originate from outside Kasane, and are there only because the employer has posted them there. To these Kasane is not home but simply a place of work, and their stay there is temporary, as they expect to be transferred to another station after a minimum of two years service in Kasane. Since they earn a regular income, this group is an important niche in the Kasane market, as they have to rely entirely on local shops for their day to day needs.

The third category is the more affluent expatriate dominated population associated with the tourism-related business of the lodges, hotels and safari camps. While in terms of numbers this group is relatively small, it comprises the economic muscle of Kasane, as it is made up of the investors and employers in the township and its hinterland.

4.3 Existing Supply/Demand Gaps

The long list of Suggested Project Ideas in section 5 of this report indicates the local population's perception of the supply and demand situation in Kasane. Similarly, section 4.4 - Categories of Existing Enterprises provides an overview of what there is in Kasane.

Supply and demand in Kasane is considered in three categories: firstly in terms of goods and services that do not exist at all in Kasane, secondly in terms of goods and services that are available in Kasane, but are of poor quality and/or standard of service, and thirdly goods and services that are adequately available and/or are in excess. However in some cases it is not possible to categorise as described here, because quite often there were general trading enterprises which covered nearly every item.

4.3.1 Speciality services such as Dry Cleaning, Undertakers, Entertainment (including Cinema), Private Medical Practice, Restaurant and Take Away, Bookshop and Sports and Music were not available in Kasane at the time the study was conducted. Although each lodge had a curio shop attached to it, there were no local curio making activities. In fact, the consultant was made to understand that most artefacts sold in local curio shops were of Zambian or Zimbabwean origin.

4.3.2 Kasane has a good variety of goods and services provided in general dealers and other enterprises, but on a monopolistic, and at times inadequate level of service. As the sketch map shows (Appendix 1), there are several enterprises which provide food stuffs, toiletry, textiles and other consumables. The general concern amongst consumers was that these enterprises were either inadequate in terms of variety of stocks carried or charging exorbitant prices because of lack of competition. For example at the time of the carrying out of this survey, there was no butchery in Kasane, but various general dealers and supermarkets had small meat departments. While this kind of service probably serves the interests of the local private consumers well, a significant section of the population of Kasane, particularly the business sector felt that the service was so inadequate it could as well be considered non-existent. The major bulk consumers of meat products, namely lodges, get their meat from Francistown, Gaborone or even South Africa.

4.3.3 Within the very small Low Cost Shopping Centre, for example, we counted five trading stores and small general dealers virtually dealing in the same products, adjacent to which were three bars and a bottle store. Of these, two also doubled as butcheries, and one of these also had a back yard bakery. There are also two bakeries in the Central Business District, which lies only two streets away from the Low Cost Shopping Centre, and as Appendix 2 (will show, there are several other small scale FAP funded bakeries in the village. Another saturated business venture is sewing, with six operating FAP funded enterprises in Kasane alone.

4.4 Categories of Existing Enterprises in Kasane Village

This section lists numbers and types of businesses found in Kasane at the time of the survey. It should be noted, however, that the neighbouring village of Kazungula, which is only 10 kilometres away from Kasane, also carries a number of other businesses not listed below, but which have their market in Kasane. The Kazungula Industrial Area serves the Kasane population, with such businesses as the liquor distributors, motor sales and the chicken farms relying almost entirely on the Kasane market. As stated elsewhere, although Kasane and Kazungula are separate entities, they form a single planning area.

<u>Type of Business</u>	<u>Location</u>	<u>Number of Businesses</u>
Irrigated Farm		1
Chemist	CBD	1
Bakery	CBD	2
	Low Cost Shopping Centre	4
Wholesaler (Sefalana)	Industrial Area	1
Supermarket	Game Park Entrance	1
Shoe Store (Taku)	CBD	1
Small General Dealer/ General Trading	Low Cost Shopping Centre	5
General Merchants	CBD	1
Clothing Shop/Boutiques	CBD	3
Curio Shops	At all lodges	4 (also sell clothing)
Bar and Bottle Store	Low Cost Shopping Centre	3
	CBD	2
	Safari Lodge Entrance	1

Each lodge has its own bar, but these are normally not frequented by locals. There are also several Shabeens at 'Plateau' residential area and numerous Traditional brew sales points in Kasane 'village'.

Filling Station	Game Park Entrance	1
Furniture Shop	CBD	1
Hotels/Lodges	Along River Front	5 (including Chirwelo and Kubu)
Hardware	CBD	1
Tyre Services	Kazungula	2
	Kasane	1
Management/Courier Services		1
Hair Dressing	CBD	2
Sewing/Fashion Design		7
Knitting		2
Welding	CBD	1

The last three business categories listed above are FAP funded businesses, and the consultant was not able to establish the exact location of some of them, and Appendix 2 is the IFS list of all FAP funded projects throughout the Chobe District since 1982, and their current status. There are also several Safari Operator businesses in Kasane, some of them attached to the four lodges.

This list is by no means exhaustive. The Chobe Brigades Trust (in Kazungula) undertakes several operations which have not been listed here because the Trust is considered to be outside Kasane.

4.5 Private sector Employment in Kasane

The consultant was not able to obtain up to date private sector employment data because it was not possible to visit each and every employer in Kasane. As a result the information contained in this section has been extracted from the District Development Plan, or based on reports supplied by the Department of Labour and Social Security.

According to the District Labour Office report covering the period January to December, 1994, there were 119 business undertakings in the whole Chobe District, employing a total of 1031 citizens. This figure includes the Pandamatenga farms and safari camps, whose activities tend to be seasonal, which altogether employed 130 locals, or 12.61% of the local labour force.

The Table below is taken from the District Development Plan (1989-1995), which is currently under review. While the table presents employment projections (1995) for the whole District, it is possible to arrive at a reasonable estimate of the actual current private sector employment. By removing the figures relating to Commercial Farms (which are in Pandamatenga), Construction (which has since ceased), and the figures for Central and Local Government and Education, the private sector employment figure for the district is 1158. Given that even at the time of writing some companies were closing down their operations in Kasane, the Labour Department figure of 1031 becomes quite realistic. Since Kasane is the District capital and commercial centre, it can be assumed that the majority of those in private sector employment actually work in Kasane. With an estimated population of around 5000, and overall private sector employment of just under a thousand, we can assume that the private sector employs between 15% and 20% of the population of Kasane, but only about 5% of the total district population.

EMPLOYMENT FIGURES

<u>Type of activity</u>	<u>1986</u>	<u>1988</u>	<u>1995 (Projected)</u>
Wholesale/Retail	84	127	225
Construction	194	234	384
Safari Companies	78	64	84
Garage/Motor Spares	23	19	59
Manufacturing/Repair	291	161	193
Hotel and catering	204	171	288
Bars and Restaurants		27	99
Central Government	493	513	573
Local Government	104	120	170
Education	72	92	112
Commercial Farms	200	600	1200
BDC Farm	42	57	77
Other		73	123
TOTAL	<u>1785</u>	<u>2231</u>	<u>3587</u>

4.6 Relations between locally based Financial Institutions and Villagers

Only one financial institution operates in Kasane, Barclays Bank. Even then, it only operates a satellite Branch, which merely receives requests and checks that the paper work is done correctly, and passes on to Francistown, with recommendations. All decisions regarding loan applications and opening of accounts are taken in Francistown. Otherwise the Branch serves only as a cashing and depositing point, apparently for all other commercial banks operating in Botswana. Some Kasane residents felt that because of their distance from the locus of decision making, their requests are often not given due consideration, and that often there are long delays from the time a transaction is commenced to the time the required service is delivered. Otherwise Kasane residents have to travel 500 kilometres to Francistown to obtain a full range of banking services. The only other source of funding, for those enterprises that qualify, is the Financial Assistance Policy, but the process is also very long as the final decisions are made in Gaborone, with the Local IFS Office recommending, and subsequently monitoring approved projects.

4.7 Volumes of Products Produced in the Village

Except for Chobe Farms, bakeries, the sewing and knitting enterprises and chicken farms, most businesses in Kasane are of a retail nature, not production. Very few entrepreneurs provided production figures. The figures below are rough estimates only.

<u>Item</u>	<u>Monthly Production</u>
Bread	100 000 loaves (the largest bakery = 60 000)
Chicken Meat	4 000 kg (one farm only)
Sewing	50-60 items (one factory only)

Due to time constraints the consultant was not able to obtain production figures several enterprises, including Chobe Farms which, we were reliably informed, now exports its produce to South Africa, suggesting production must be quite high. Other business enterprises were not willing to share such information with us, hence the relevant section in the questionnaire was not completed.

4.8 Location of Businesses in Kasane

Businesses in Kasane are concentrated in two places, the Low Cost Shopping Centre and the Central Business District, which, as stated elsewhere, are only two streets apart. However, there are commercial plots set aside for development in the 'Plateau'. The attached sketch map, Appendix 1, gives an indication of the location of some of the businesses. It also serves the purpose of showing the general location of commercial plots in the township.

5. SUGGESTED PROJECT IDEAS

Listed below are ideas suggested by various individuals and groups interviewed. All suggestions made are listed here, and not in any order of priority, importance or viability. It is important to note that this initial list was further discussed by the Kasane Business Council, who then proposed a shortlist to the consultant.

1. Low Cost Hostels or Guest House
2. Dairy Farming and Processing of Dairy Products.
3. Tannery
4. Curio Making
5. Fish Farming
6. Tourism Advertising Agency.
7. Shopping Plaza
8. Cultural Village,

9. Timber and Furniture Manufacturing using local hardwoods gathered on a sustainable basis.
10. Taxi or Bus Service between Kasane CBD and Plateau, and between Kasane and Kazungula.
11. Grain milling
12. Butchery/abattoir
13. Grass Harvesting and Marketing
14. Jam Making using local wild fruit, e.g. Motsintila
15. Funeral Parlour and Undertakers
16. Piggery
17. Fruit Farm and Shop
18. Commercial Printing and Photocopying
19. Cinema
20. Entertainment Centre
21. Dry Cleaner
22. Film Developing
23. Restaurant and Take away
24. Transport service between Kasane and 'Enclave' villages.
25. Pottery
26. Chicken farming
26. Basket weaving
27. Safari Company -owned and operated by locals

28. Wildlife Farming such as Ostrich and Small Game
29. Fertiliser and Stock Feed Manufacture
30. Quarry (Coarse Aggregate)
31. Cotton Farming
32. Brewery - Traditional
33. Wholesale and/or Supermarket
34. Food Processing
35. Assembly Plant for Electronic Gadgets
36. Bookshop/Stationery
37. Sports and Music Shop
38. Florist
39. Wildlife Meat Processing
40. Private Medical Practice
41. Vehicle Spares and Repair
42. Textiles
43. Food Franchises - KFC, Chicken Licken, Wimpy
44. Tourism Training Centre
45. Building Materials Supply

6. RECOMMENDED PROJECTS

6.1 Criteria for Selecting Recommended Projects

It is necessary to determine the criteria for selecting projects for implementation from the long list suggested above. The following criteria have been used:

- Economic Viability
- Employment Creation potential
- Existence of market
- Ecological soundness
- Ability to tap tourist market (where applicable)
- Availability of technology and skills
- Availability of raw materials
- Reasonable managerial demands

As indicated in the preceding section of this report, a long list of possible projects was suggested to the consultant by those who participated in the survey. In the view of the consultant, not all the suggestions are feasible, for several reasons. Some are not economically viable, others are not ecologically sound, others are either not technologically appropriate or not culturally acceptable. Of those ideas that have been found to meet all the above criteria, the prioritisation has been based on the demand for each as expressed by those interviewed. However, this has not always been so in deciding the priorities, as some suggestions may have come from single individuals, but have very good potential in the opinion of the consultant. Other projects have not been recommended because the consultant was reliably informed that they were already in the pipeline, as other investors had already applied for licences to carry out those businesses in Kasane.

6.2 Recommended Projects

The following business ventures are recommended for Kasane:

- | | |
|--------------------------------|----------------------------|
| 1. Cultural Village | 2. Fish farming |
| 3. Grain Milling | 4. Tourism Training Centre |
| 5. Low Cost Hostel/Guest House | 6. Butchery |
| 7. Restaurant and Take Away | 8. Dry Cleaner |
| 9. Supermarket at Plateau | 10. Maintenance Services |

Many more of the project suggestions listed above could prove feasible, but due the limited scope of the survey and other factors, only a few are dealt with in detail here. Interested individual investors would be advised to undertake independent detailed feasibility studies and market surveys to decide which projects would have the highest return on investment.

6.3 Project Profiles

6.3.1 Cultural Village

Nature of Project

The basic concept is to establish an open market-style complex at which local crafts can be made, exhibited and sold. Tourists would have the opportunity to watch the manufacturing process, and buy Botswana crafts. The activities would include things like wood carving, basket making, mat weaving, sewing of traditional attire, or any other traditional manufacturing process considered environmentally friendly. Traditional dancing and other cultural activities can also be incorporated into the Village. Other artefacts can also be sourced by the investor from other parts of Botswana and be sold directly to the tourists. Our understanding is that at the moment tourists buy most of their curios from Zimbabwe or Zambia, and leave Kasane without few Botswana souvenirs, if any.

Such an arrangement would enhance contact between tourists and the local community and expose the tourists to true Botswana culture, and at the same time provide a source of income for the local population.

The method of operation would be to charge tourists a fee to enter the 'village'. They would then move around as they wish, but would have to pay for such things as traditional dancing performances, 'consulting' traditional doctors, and of course buy those artefacts they find of interest, paying the artist directly. Depending on the type of ownership of the complex, the 'village' entrance fee would either be shared amongst the resident artists if it was run as a cooperative, or be collected by the investor if privately owned. Each artist would be expected to lease a stall for a specified period of time, and then give way to others to exhibit their wares.

Financial Aspects

The major item of expenditure would be putting up the structure and providing facilities, such as toilets. The operational expenses such as maintenance, security and utilities can be recouped from the exhibitors by building them into the lease fee, such that the investor would make a reasonable profit. No doubt an interested investor would have to undertake a detailed study to determine the occupancy rates and the demand of such a facility by the tourists. Without that information, the consultant is hesitant to provide financial estimates.

Market Potential

The main proponents of this idea are those already involved in the tourist industry in Kasane, and some of the influential personalities in the township. The 'village' would form part of the tour package, which ensuring that the majority of, if not all, tourists visiting Kasane would visit the village. Given the high number of tourists visiting, especially during the peak period, the 'village' would almost always be busy.

Possibility of FAP or other Funding

The FAP scheme has recently been reviewed, and the Tourist Industry is now covered by the scheme. We are however not certain if commercial banks can back the scheme, especially since only one bank operates in Kasane.

Estimated Employment to be created

The consultant believes that this project would provide direct employment to at least three people, in addition to the investor, namely a cleaner, a night watchman and a bookkeeper. At the same time each artist would be in effective full-time employment for the duration of his or her stay in the village, and hopefully they would be using other people to gather the raw materials they need to make their curios.

Technical and Professional Expertise Required

This project requires managerial and marketing skills, and to some extent, an artistic inclination, so as to be able to decide which artists should be contracted to display their work. Otherwise each exhibitor, should, in their own right, be experts in their field, and therefore require no training. They can, however, train their apprentices on the job.

6.3.2 Fish Farming/Fishing

Nature of the Project

The project entails breeding fish such as bream, bass and other species in manmade ponds and harvesting and marketing fresh and/or frozen fish. The fish farm would best be located on the river front, although water can be drawn from the Chobe River to any site within reasonable distance from the river. Fish farming could also be combined with commercial fishing in the 'Enclave' when the rivers are flooded. An attractive feature of this project is that it would be in harmony with the natural resources conservation, as it is not dependent purely on extraction, but but mainly on production.

Financial Aspects

This is a project that would require substantial capital investment. The major items of expenditure would be the construction of ponds which should as far as possible possess all the natural characteristics under which fish live; water reticulation, including pumping equipment; electrification; fish feed; labour; etc. A detailed market study and cash flow projection would be required to determine costs and revenue estimates for the project.

Market Potential

Fish is part of the staple diet of Kasane residents. With the drying up of Lake Liambezi, and the prohibition of fishing in the game park, Kasane is experiencing a shortage of fresh fish, hence it is in very high demand. The township residents and all lodges provide a ready market for fish. The fish could also be sold to holiday resorts in neighbouring countries such as the Victoria Falls in Zimbabwe, and to other major centres in Botswana such as Gaborone and Francistown, in frozen form.

Possibility of FAP or other Financial Support

Fish farming projects qualify for FAP funding under the agricultural sector.

Estimated Employment to be Created

This project has the potential to create many jobs. It is estimated that at least the following jobs would be created:

1 x Technical Manager	1 x Cashier
1 x Bookkeeper	1 x Night watchman
2 x Sales Clerks/Drivers	Several Pond attendants

Technical and Professional Expertise Required

The project requires expertise in fish farming and marketing in addition to the normal managerial skills.

Training required

Training in fish farming as a whole is required, and the Department of Fisheries, which has an office in the Chobe District can provide that kind of training and whatever technical back-up the investor may need. There should be no difficulty in obtaining basic expertise locally as there are several people that have previously worked with the Fisheries Unit in Kasane.

6.3.3 Grain Milling

Nature of Project

The Pandamatenga Farms produce sorghum and local people in the 'Enclave' grow sorghum and maize. These crops can be milled locally to provide residents with maize meal and sorghum meal. The milling could be on a large scale for packaging and sale to the rest of Botswana and neighbouring countries, or it could be for individuals bringing their own sorghum or maize for milling in any quantities. A brand name and would have to be decided for the product, and bags be printed to package the meal.

A sorghum mill can be purchased from the Rural Industries Innovation Centre (RIIC) in Kanye, who would also provide advise on the appropriate type of mill required for the project. A truck to collect the grain from the producers and deliver the meal to consumers would also be required.

Financial Aspects

Capital would be required to build a structure to house the meal, to purchase the mill and the delivery truck, to meet labour costs and to purchase the grain.

Market Potential

The product can be sold to local wholesalers, supermarkets and small general dealers. Local residents can also bring their produce for milling, thus relieving the local women of the burden of stamping grain. Residents in towns and villages of neighbouring countries who currently buy from Sefalana are also likely to purchase the product.

Possibility of FAP Funding

Grain milling qualifies for FAP funding, and with a properly work out cash flow projection and appropriate security, commercial banks may also provide loans for the project, although the investor would need to make a substantial contribution to the total cost of the project.

Estimated Employment to be Created

The following jobs will be created by the project:

1 x Mill Foreman/Bookkeeper
2 x Mill Attendant/Mechanic
1 x Night watchman

1 x Truck Driver
1 x Sales Clerk/Cashier

Technical and Professional Expertise Required

The milling process itself does not require much knowledge as the whole process is mechanised. However the Mill operators should have a basic understanding the mechanics of the mill so that they can undertake basic maintenance and repair of the plant.

Training Required

Operators need to be trained in operating and maintaining the mill, including replace worn parts. They also need to be trained in quality control. RIIC normally provide the technical back up, and the Botswana Mill Owners Association provides management and marketing advice members.

6.3.4 Tourism Training Centre

Nature of project

The idea is to open a training centre to assist in the overall development of the human resource in Kasane to provide skills for the many tourism-related economic and environmental conservation activities. Training can be provided on part-time basis to the staff of lodges in the areas of hospitality services provision and management ranging from waiting, bar services, reception, housekeeping, stores purchasing and stock control, cooking etc. In addition, the centre would also train game trackers and game guides and impart other skills such as tour marketing and management, thus transferring skills to the local population, so that they can eventually gain a foothold in the tour operator business. While a large number of trainees would be locals, i.e., Kasane residents already employed in the industry, trainees from other parts of the country, and eventually from the region, may also be admitted on a full-time basis, with accommodation provided, so that the centre can be fully utilised at all times. At the same time, the centre can also provide general management consultancy services to the local business community, and also provide conference facilities. To attain credibility, the centre can be accredited to any international institution of standing which would be willing to enter into that kind of arrangement. Consideration can also be given to providing adult education for the local workforce, and 'O' Level tuition to JC dropouts to maximise income.

Financial Aspects

The initial expenses for this project would be rent, furniture, training equipment and materials and salaries and wages. Current rental rates in Kasane are estimated at about P30 per square metre, and the total amount of space required for this project is estimated at 72 square metres. To break even, the centre would need to have at least 40 part-time participants a month in the various fields of training offered, at P500 per participant.

Market Potential

With four lodges and several safari companies, and with government support and accreditation to a recognised international institution, and the growing number of JC dropouts, there should be a high demand for training places from Kasane and beyond..

Possibility of FAP or other Financial Support

It is doubtful if support for such a project can be easily obtained, be it from FAP or other sources. The investor would therefore need to have enough starting capital to cover at least the first six months of operation. However once in operation, the business should generate sufficient profit to raise whatever security may be required to procure a loan for expansion.

Estimated Employment to be Created

It is estimated the project will create the following jobs initially:

3 x Training Officer/Consultant

1 x Cleaner

Once the centre is established and full-time resident courses offered, the additional jobs of cooks and warden are likely to be created, and there will also be any number of part-time jobs created, depending on the variety of courses offered..

Technical and Professional Expertise Required

The required expertise is in the fields of hotel management and tour operator training. The expertise can either be imported, or local Tour Operators can be used to run the part-time courses, while local secondary school teachers can be utilised for 'O' Level courses. The Department of Wildlife and National Parks staff can also be used for some of the courses.

Training Required

No training should be required as only professionally qualified staff would be employed. However, if privately owned, the investor may have to be given basic training in the management of an educational institution.

6.3.5 Low Cost Guest House/Hostel

Finding hotel accommodation in Kasane is very difficult especially during the peak period of the tourist season. Bookings need to be made well in advance. In addition, the existing lodges are of a very high standard, and therefore generally expensive, while the affordable camp-sites require camping equipment and own bedding. The proposed project would provide affordable but comfortable accommodation for the average Motswana traveller, and the 'hiking' tourist who so much want to visit Kasane, but find the costs prohibitive. The proposal is to put up small self-contained (with toilet and hot shower) rondavels or rooms, with electricity and bedding. Some of these may include bed and breakfast, while others may not. The number of units will depend on the amount of land available, and the size of the units. A key factor to this project is that it would have to be on the river front so as to provide that scenic view that is expected of a good holiday resort.

A low to medium cost restaurant which provides take-away services would be a welcome addition to the services available in Kasane. Not only would it cater for guests who chose to sleep and dine at the guest house, it would also cater for the many public officers who work in the Kasane CBD, who, at the moment have to be transported at government expense, to their houses at the Plateau for lunch.

Financial Aspects

The initial costs of this project relate to the construction of the rooms/rondavels, and their number. The recurrent costs would be for labour and maintenance, and, depending on the preferred mode of operation, catering. Once again, as no thorough assessment of the financial implications of the project has been made, it is recommended that interested investors undertake more detailed feasibility studies before committing their resources to the project.

Market Potential

The clientele for this project would be the local holiday maker, and if the standard is good enough, government officers and other local business people may opt for such accommodation instead of the more up market lodges. As shown above, the restaurant would serve local public servants, in addition to the many touring students who pass through Kasane by their bus loads on their way to the Game Park and Victoria Falls.

Possibility of FAP or other Financial Support

Investors would have to raise their own capital to start such a business, or seek bank assistance.

Estimated Employment

1 x Guest House Manager/ Bookkeeper	2 x Security Guard
2 x Receptionist/Reservations Clerk	2 x Cleaner
2 x Chef	4 x Kitchen Helpers
2 x Cashier	

The numbers may change with the seasons, as is the trend in the tourism industry.

Technical and Professional Expertise required

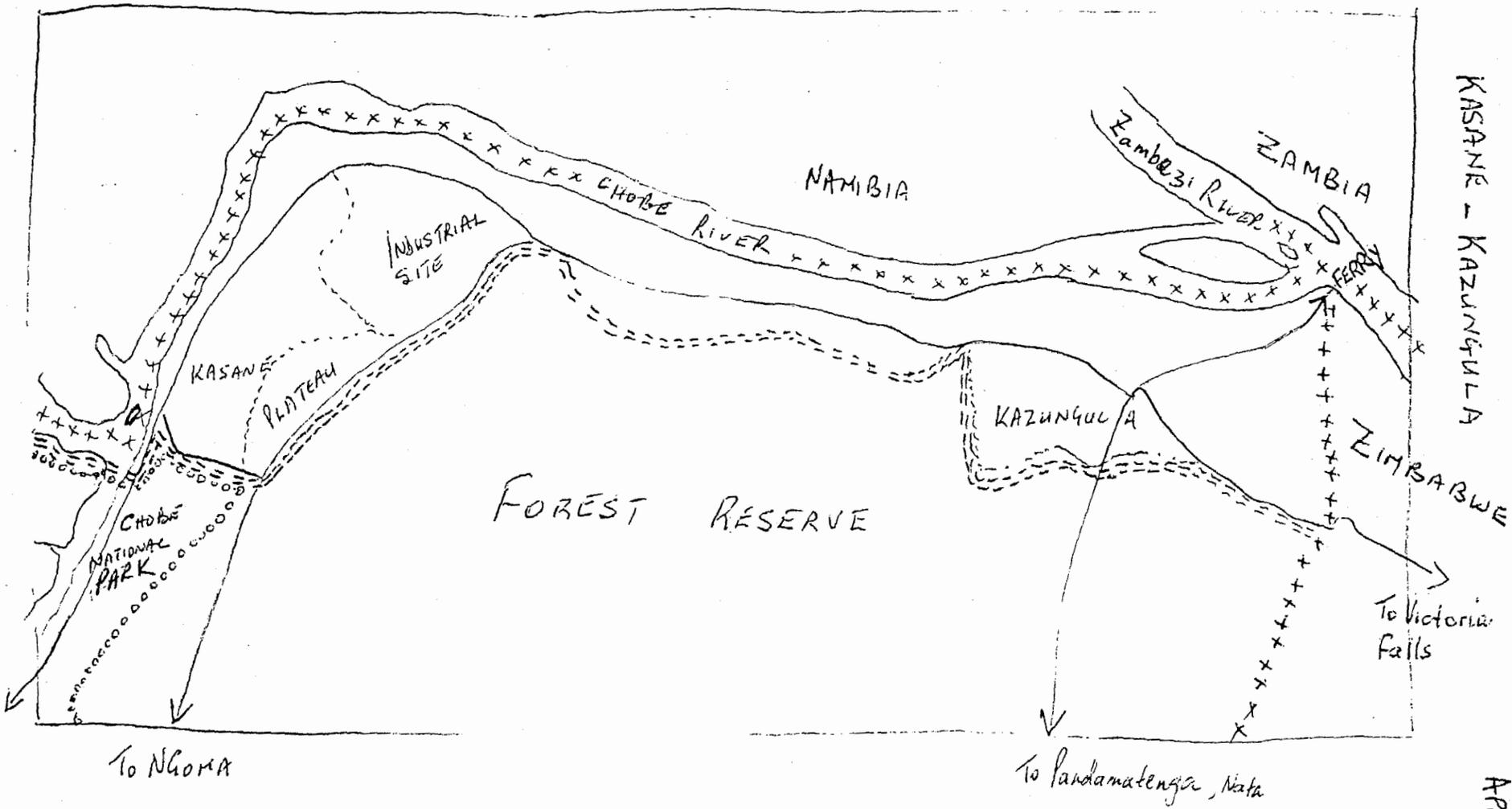
The most important skill required is hotel management and catering, and at competitive salaries and with good management, the expertise can be attracted from within the existing labour pool in Kasane.

Training Required

As indicated above, there are many in Kasane who already possess the necessary skills to carry out the tasks necessary to run the project. However, we would recommend the investor familiarise themselves with the industry if they are not already engaged in it. It would also be necessary to retrain the staff employed so that they shed off the culture and possibly bad habits of their previous employment.

7. CONCLUSION

Although only five project profiles are included in this report, the remaining five in the list of recommended projects are deemed viable projects. Interested investors should be encouraged to undertake detailed feasibility studies and market surveys regarding opening a Butchery, a Supermarket, and even a Bar and Bottle Store at the Plateau, as this area currently does not have any of these much needed and popular services. The other three recommended projects, namely a Restaurant and Take away, Dry Cleaner and Maintenance Services would best be located in the Central Business District of Kasane, as they would serve a much bigger clientele, with the last two covering Kazungula as well. Several other projects in the initial list if suggestions could prove quite profitable ventures with proper planning, funding and management.

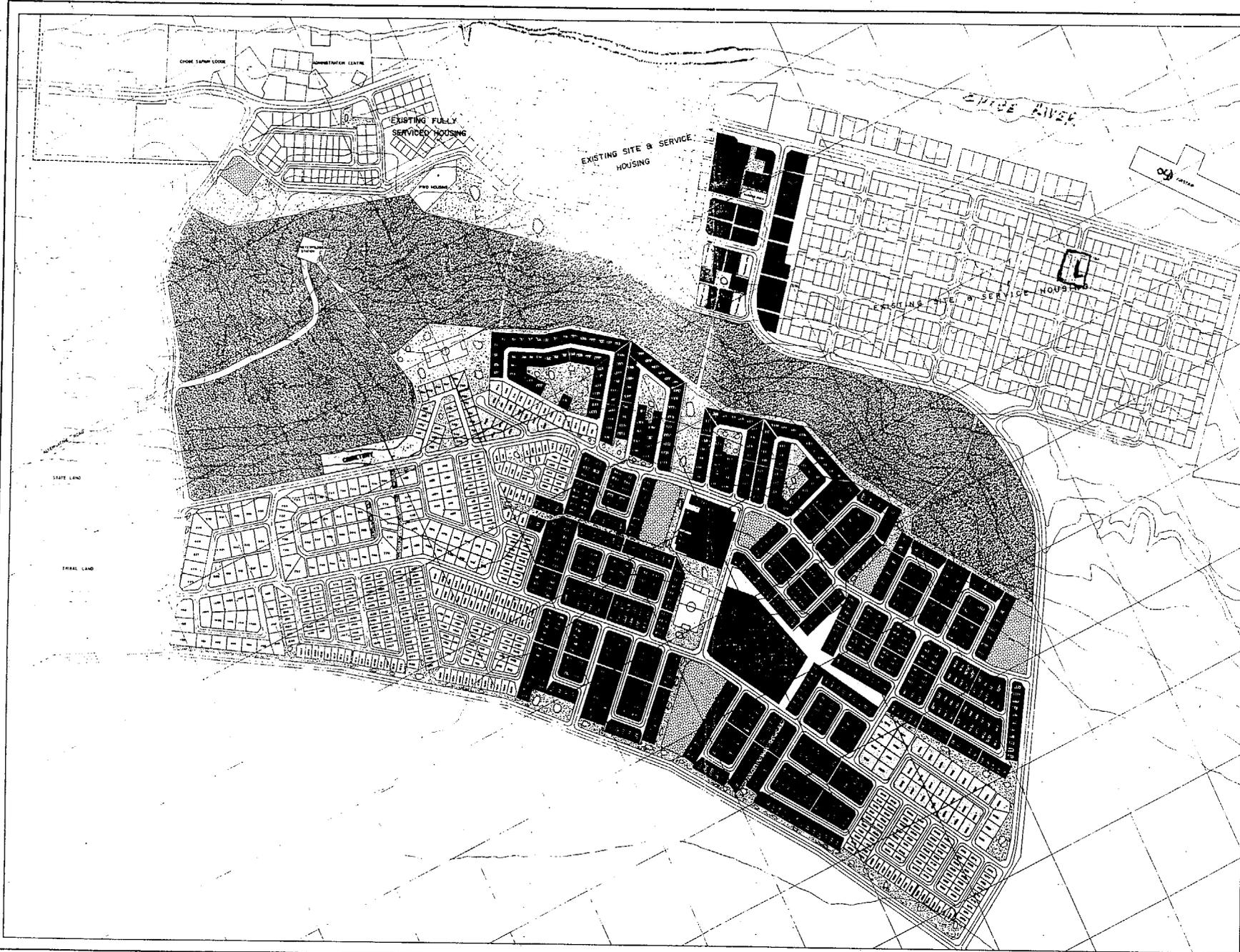


KEY

- xxxxx BOUNDARY (INTERNATIONAL)
- MAJOR ROADS
- - - - - DISTRIBUTOR ROADS
- ==== PLANNING AREA BOUNDARY
- o o o o o NATIONAL PARK BOUNDARY

APPENDIX 1

KASANE TOWNSHIP PLATEAU AREA



- LEGEND
- SITE B SERVICE
 - LOW COST
 - MEDIUM / HIGH COST
 - CONSERVATION AREA
 - CMC & COMMUNITY
 - COMMERCIAL
 - MULTI PURPOSE
 - OPEN SPACE

LOW COST
SHEEPENING AREA

REVISION	DATE	DESCRIPTION
REVISED	4/93	TRACED FROM SURVEYED CADESTRAL MAPS (COMPILATION SHEETS) FROM DSL AND REVISED COPY OF 3 IF 45

MAP COMPLETION DATE: 04/93	APPROVED DATE:
SCALE 1:2 500	
DRAWING NO. 5.11.45	

DEPARTMENT OF TOWN & REGIONAL PLANNING
PRIVATE BAG 0042, GABORONE.

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CHOBE FAP INDUSTRIAL PROJECTS APPROVED SINCE 1982

Code	Name	Location	Type	Status
1-82/83	J. Chika	Kasane	Bakery	Cancelled
2-82/83	B. Tshamba	Kachikau	Carpentry	Failed
3-82/83	M. Manze	?	Knitting	Cancelled
4-82/83	K. Makanye	Satau	Knitting	Operating
5-82/83	M. Machira	Parakarungu	Bakery	Failed
8-82/83	L. Sibiya	Kasane	Bakery	Operating
9-82/83	S. Dambe	Kachikau	Bakery	Operating
10-82/83	E. Lebalelo	Kasane	Sewing	Failed
11-82/83	H. Mbango	Kasane	Bricks	Failed
23-83/84	M. Mwezi	Mabele	Sewing	Failed
24-83/84	K. Kabana	Kazungula	Bakery	Cancelled
25-83/84	M. Molotlhegi	Kazungula	Bakery	Failed
56-83/84	C. Chika	Kasane	Sewing	Cancelled
72-85/86	C. Chika	Kasane	Sewing	Operating
73-85/86	G. Nkobaba	?	Bakery	Cancelled
74-85/86	A. Lungu	?	Bakery	Cancelled
75-86/87	Exp E. Lebalelo	Kasane	Sewing	Failed
76-86/87	Exp L. Sibiya	Kasane	Bakery	Operating
77-86/87	R.C. Tembwe	Kasane	Carpentry	Cancelled
78-86/87	E. Mbanga	Kasane	Bakery	Cancelled
79-86/87	A. Kamhara	Kasane	Bricks	Failed
84-86/87	Chobe Charcoal	Ch.For.Res.	Charcoal	Failed
85-86/87	S. Muniswaswa	Kasane	Carpentry	Cancelled
86-86/87	Z. Kubati	Kazungula	Bakery	Failed
87-86/87	M.Mmolainyana	Kaz.Ind.Sites	Carpentry	Operating

FAP PROJECTS APPROVED SINCE 1982

Page 2

88-87/88	H. Chika	Kavimba	Sorghum Mill	Failed
89-87/88	R. Kalundu	Lesoma	Sewing	Operating
90-87/88	M. Machira	Parakarungu	Carpentry	Operating
91-87/88	M. Mafa	Pandamatenga	Bakery	Failed
92-86/87	P. Danga	Kasane	Knitting	Operating
93-87/88	A. Mazunga	Mabele	Knitting	Not Oper
94-87/88	K. Ntalamo	Parakarungu	Sewing	Operating
95-87/88	G. Makgowe	Kazungula	Sewing	Failed
114-88/89	Exp P. Danga	Kasane	Knitting	Operating
115-88/89	M. Mosheti	Parakarungu	Knitting	Operating
116-88/89	S. Mogorosi	Kasane	Upholstery	Failed
117-88/89	M. Situmbeko	Kasane	Sewing	Cancelled
121-88/89	M. Setumbeko	Parakarungu	Bakery	Cancelled
122-88/89	L. Ndereki	Mabele	FatCakes	Operating
123-88/89	M. Mongana	Pandamatenga	Sewing	Cancelled
124-88/89	D. Samunzala	Kasane	Bakery	Operating
125-88/89	Exp M. Mmolainyana	Kaz.Ind.Sites	Carpentry	Operating
126-89/90	S. Setlhare	Kasane	Sew/Knit	Operating
129-89/90	Patrick Majola	Kaz.Ind.Sites	Bricks	Operating
130-89/90	Exp D. Samunzala	Kasane	Bakery	Operating
131-89/90	Exp P. Danga	Kasane	Knitting	Operating
132-89/90	N.C. Shamukuni	Kasane	Sewing	Operating
133-89/90	S.K. Neo	Kachikau	Sewing	Not Oper
134-89/90	VDC Bakery	Satau	Bakery	Operating
135-90/91	G. Mosupukwa	Kasane?	Bricks	Not Oper
137-90/91	M. Zambo	Mabele	Bakery	Not Oper

FAP APPROVED PROJECTS SINCE 1982

Page 3

138-90/91	G. Sarefu	?	Bakery	Cancelled
139-90/91	T. Phaladze	Pandamatenga	Bakery	Transfer'd
140-90/91	J. Kayoka	?	Bakery	Cancelled
141-90/91	T. Lejahe	Kasane	Sewing	Failed
143-90/91	J. Shamukuni	?	Carpentry	Cancelled
144-90/91	Ch. Brigades	Kazungula	Bricks	Failed
150-90/91	M.D. Molefi	?	Bricks	Cancelled
151-90/91	Exp M. Mosheti	Parakarungu	Sew/Knit	Operating
152-90/91	A.M. Mwezi	Kasane	Fat Cakes	Failed
153-90/91	P. Ramaloka	Kazungula	Bricks	Failed
154-90/91	O. Tswaipe	Lesoma	Bricks	Failed
155-90/91	Exp P. Danga	Kasane	Sew/Knit	Operating
156-90/91	V. Morebodi	?	Bricks	Cancelled
157-90/91	J.K. Dube	Kasane	Carpentry	Cancelled
158-91/92	M.W. Mwezi	Mabele	Bricks	Not Oper
159-91/92	Exp S.K. Neo	Kachikau	Sewing	Not Oper
160-91/92	J. Tsheko	Pandamatenga	Bricks	Not Oper
161-91/92	M. Chizuyo	?	Bakery	Cancelled
162-91/92	K. Molefi	Kachikau?	Bricks	Not Oper
163-91/92	S. Makhura	Kasane	Welding	Operating
164-91/92	L.S. Maswabi	Kachikau	Bricks	Not Oper
165-91/92	E. Mosheti	Kasane	Bakery	Operating
166-91/92	Exp T. Phaladze	Pandamatenga	Bakery	Transfer'd
167-91/92	G.D. Nchindo	Masanzo	Bakery	Cancelled
168-91/92	R. Mukuwa	Parakarungu	Bakery	Operating
169-91/92	K. Thomas	Kasane	Bakery	Cancelled

FAP APPROVED PROJECTS SINCE 1982

Page 4

170-91/92	E. Nshimwe	Lesoma	Bakery	Not Oper
171-91/92	J. Mafika	Kasane	Welding	Cancelled
172-91/92	A. Mazunga	Mabele	Knitting	Not Oper
173-91/92	M. Seope	Kasaane	IceBlocks	Cancelled
174-91/92	L. Inambo	Kasane	Sewing	Transfer'd
175-91/92	W.M. Mazunga	Kavimba	Bricks	Int Oper
176-91/92	Exp M. Mmolainyana	Kaz.Ind.Sites	Carpentry	Operating
177-92/93	Exp M. Molatlhegi	Kazungula	Bakery	Cancelled
178-92/93	A. Nkuba	Mabele	Bakery	Operating
179-92/93	Exp L. Sibiya	Kasane	Bakery	Operating
180-92/93	L. Pelaelo	Pandamatenga	Bakey	Cancelled
181-92/93	G. Motsatsing	Kasane	Knitting	Transfer'd
182-93/94	Exp S. Setlhare	Kasane	Sew/Knit	Operating
183-93/94	J. Kwele	Kasane	Sewing	Operating
184-91/92	C. Keitlhokile	Kavimba	Sew/Knit	Operating
185-93/94	Exp P. Danga	Kaz.Ind.Sites	Sew/Knit	Operating
186-93/94	D. Diau	Kaz.Ind.Sites	Fences	Cancelled
187-93/94	A. Kasona	Pandamatenga	Bricks	Int Oper
188-93/94	K. Matete	Kasane	Sew/Knit	Int Oper
189-93/94	Exp A. Nkuba	Mabele	Bakery	Operating
190-93/94	L. Rungwe	Kasane	Sewing	Operating
193-92/94	Exp L. Ndereki	Mabele	Bakery	Operating
194-93/94	K.Tshatshoba	Kachikau	Bakery	Operating
195-93/94	Exp K. Makanye	Satau	Knitting	Operating
196-93/94	J. Amos	Pandamatenga	Bricks	Operating
198-94/95	J. Ishmael	Kachikau	Bricks	Cancelled

FAP APPROVED PROJECTS SINCE 1982

Page 5

199-94/95	C. Mabuku	Mabele	Bricks	Cancelled
200-94/95	Power Majola	Kaz.Ind.Sites	Welding	Cancelled
201-94/95 Exp	S. Makhura	Kasane	Welding	Cancelled
202-94/95 Exp	R. Mukuwa	Parakarungu	Bakery	Operating
203-94/95 Exp	M. Mmolainyana	Kaz.Ind.Sites	Carpentry	Cancelled
204-94/95	M. Mmolainyana	Kaz.Ind.Sites	Welding	Cancelled
206-94/95 Exp	C. Chika	Kasane	Sewing	Operating
207-94/95	D. Diau	Kaz.Ind.Sites	Fences	Pending
208-94/95	J. Jeremiah	Kasane	Welding	Cancelled
209-94/95	K. Limba	Kazungula	Sewing	Operating
210-94/95	B. Munyima	Kazungula	Bakery	Operating
212-95/96	M. Mukuwa	Parakarungu	Sewing	Operating
214-95/96 Exp	S. Makhura	Kasane	Welding	Pending
215-95/96 Exp	L. Rungwe	Kasane	Sewing	Operating
216-95/96	J. Kebitsang	Kasane	Sewing	Operating
217-95/96 Exp	M. Mosheti	Parakarungu	Sew/knit	Pending

Notes:

- 1) Non-consecutive numbers indicate agricultural projects
- 2) Cancelled means personal contribution was not paid
- 3) Failed means that project is no longer carried on IFS active list; assets may or may not have been recouped
- 4) Int Oper means that the project occasionally operates
- 5) Pending means that the personal contribution is still awaited
- 6) Operating means that for most of the time the business is active and the owner is present
- 7) Exp means expansion, not a new project
- 8) Poor records were kept in the past and we are not always able to determine the location or grant amount
- 9) Transfer'd means that the owner has moved to a new district
- 10) Not Oper means that successive visits have failed to find any activity and the project is being referred to the Task Force

IFS Chobe

21 August 1995

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APPENDIX 3

QUESTIONNAIRE

STUDY TO DETERMINE INVESTMENT OPPORTUNITIES IN SELECTED VILLAGES

Introduction

This study is being carried out on behalf of the Botswana Confederation of Commerce, Industry and Manpower (BOCCIM). The background to the study is clearly stated in the Terms of Reference overview, and the relevant section is reproduced below:

Generally, Botswana still suffers from the situation of a dual economy where the rural areas are somehow depressed while the urban areas are enjoying some degree of modernity. Consequently the problem of rural urban drift continues. With the slowing down of the economy and the accompanying scarcity of jobs in the urban areas, something must be done to create jobs in the rural areas if Botswana is to maintain a stable and peaceful society. However, there seems to be a problem with the identification of projects or project ideas in the villages. People tend to copy whatever somebody can initiate. This results in overtrading and destructive competition.

The Purpose of this Study

The purpose of this study is to identify investment opportunities in your village and thereby creating a shopping basket of project ideas for local and other investors.

Please study the questions carefully and answer them as best you can. Attach a separate sheet if the space provided is not adequate.

We would like to assure you that your responses will remain confidential, and will not be used for any other purpose other than this study.

NAME:.....DEPT/COMPANY.....

POSITION.....

1. List as many raw materials as possible which are available in your village which you feel can be turned into consumable products.

2. Suggest ways in which each raw material listed at 1. above can be used to produce a given a locally processed product.

3. Do you think there is a market for each of the said products?

4. Who do you think are the possible consumers for each product/ commodity?

5. Do you think it is worthwhile to produce the commodities locally?
6. If the answer to 5 above is yes, suggest a possible location for each product, and give a reason why you have picked that particular location.

7. Who do you think the investor should be for each commodity?
 - (a) Individuals
 - (b) Cooperatives
 - (c) Groups

8. List the services, according to priority, that you feel are most needed locally but are not available.
9. Explain why you think each of the services listed at 8 above is necessary.
10. Do you think there is a local market for each service/product? Specify who you think are the possible consumers for each service.
11. Are the skills required for providing the services listed above available locally?
12. If the answer to 11 above is No, suggest ways in which such skills can be acquired.

FOR FINANCIAL INSTITUTIONS ONLY

13. What type of businesses would you be willing to assist financially in the form of loans? (Please specify nature and type of business, and give reasons)
14. What are the conditions for such loans, if any?
15. What would you, as a financial institution, want to do or to be done to boost investment levels in the village?

FOR EXISTING BUSINESSES

16. Do you feel there is room for expanding your company or business?
17. If the answer to 16 is Yes, how would you want to expand your business?
 - (a) Get a Bank loan
 - (b) Get a partner
 - (c) Go for a financial assistance scheme.

Give reasons for your choice.

18. How many people do you currently employ?
19. If you expand, how many more people would you employ?
20. If you are a producer, list the products you produce, and the quantities per month.
21. Who do you sell your products to, and what is your sales volume per month?
22. List your existing and potential competitors.
23. Suggest some other projects that you think would be commercially viable within the village.
24. In your opinion, what are the main constraints to investments in the village?