



**ASSESSMENT OF AGRICULTURAL INFORMATION NEEDS IN
AFRICAN, CARIBBEAN & PACIFIC (ACP) STATES FOR CTA'S
PRODUCTS AND SERVICES**

AFRICA

Country Study: Mozambique

Final report

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List of Acronyms

ABIODES	Association for Biodiversity and Sustainable Development
ACP	Africa, Caribbean and Pacific
ADIPSA	Apoio ao Desenvolvimento de Iniciativas Privadas no Sector Agrário (Support to Private Sector Initiatives in the Agricultural Sector)
AGOA	African Growth and Opportunities Act
AMCS	Associação Mulheres de Comunicação Social (Mozambican Women's Media Association)
AMMCJ	Associação de Mulheres Moçambicanas Careira Jurídica (Association of Women in Judicial Careers)
AMODER	Associação Moçambicana para o Desenvolvimento Rural (Mozambican Association for Rural Development)
CDA	Centro de Documentação e Informação Agrícola (Centre for Agricultural Documentation and Information)
CEF	Centro de Experimentação Florestal (Forestry Research Centre)
CEPAGRI	Centro de Promoção de Agricultura (Centre for the Promotion of Agriculture)
CFA	Centro de Formação Agrária (Centre for Agricultural Training)
CGIAR	Consultative Group on International Agricultural Research
CIAT	Centro de Investigação de Agricultura Tropical (Centre for Investigation in Tropical Agriculture)
CIT	Centro de Informação e Treino (Centre for Information & Training)
CLUSA	Cooperative League of the United States of America
CTA	Technical Centre for Agricultural and Rural Cooperation
CTA	Confederação das Associações Económicas (Mozambican Business Confederation)
CTIA	Conselho Técnico de Investigação Agrária (Technical Committee for Agricultural Research)
DEST	Departamento de Estatística (Department of Statistics)
DFID	Department for International Development
DINAGECA	Direcção Nacional de Geografia e Cadastro (National Directorate of Geography and Cadastre - now DINAT)
DINAT	Direcção Nacional de Terras (National Directorate of Lands)
DNER	Direcção Nacional de Extensão Rural (National Directorate for Rural Extension)
DNFFB	Direcção Nacional de Florestas e Fauna Bravia (National Directorate of Forestry & Wildlife)
DORA	Distribution of Reference Books on Agriculture
DPA	Direcção Provincial de Agricultura (Provincial Directorate of Agriculture)
EMBRAPA	Empresa Brasileira de Pesquisa Agro-Pecuária (Brazilian Company for Agricultural and Livestock Research)
EPA	European Partnership Agreement
EU	European Union
FAEF	Faculdade de Agronomia e Engenharia Florestal (Faculty of Agronomy and Forest Engineering)
FAO	Food and Agriculture Organisation
FDC	Fundação de Desenvolvimento Comunitário (Community Development Foundation)
FEWS NET	Famine Early Warning System
FFA	Fundo do Fomento Agrário (Agriculture Start-Up Fund)
FFP	Fundo de Fomento Pesqueiro (Fisheries Start-Up Fund)
FGLG	Forest Governance Learning Group
FRELIMO	Frente de Libertação de Moçambique (Liberation Front of Mozambique)

G20	Grupo de Vinte (Group of Twenty)
GAPI	Gabinete Apoio a Pequena Indústria (Office for the Promotion of Small Business)
GDP	Gross Domestic Product
GIS	Geographic Information System
GOM	Government of Mozambique
GovNet	Government Electronic Network Project
GPSCA	Gabinete de Promoção do Sector Comercial Agrário (Office for Support to Commercial Agriculture)
GTZ	German Agency for Technical Cooperation
IAM	Instituto de Algodão Moçambicano (Institute of Mozambican Cotton)
ICM	Instituto de Cereais de Moçambique (Mozambican Cereals Institute)
ICM	Information and Communication Management
ICRAF	World Agroforestry Centre
ICRISAT	International Crop Research Institute for the Semi Arid Tropics
ICT	Information and Communication Technology
IDPPE	Instituto de Desenvolvimento de Pesca de Pequena Escala (Institute for the Development of Small Scale Fisheries)
IIAM	Instituto Moçambicano de Investigação Agrária (Mozambican Institute of Agricultural Research)
IIED	International Institute for Environment & Development
IIP	Instituto Nacional de Investigação Pesqueira (National Institute of Fisheries Investigation)
IMF	International Monetary Fund
INA	Instituto Nacional de Açúcar (National Sugar Institute)
INCAJU	Instituto Nacional de Cajú (National Cashew Institute)
INE	Instituto Nacional de Estatística (National Statistics Institute)
INIA	Instituto Nacional de Investigação Agrária (Agronomic Research Institute)
INIVE	Instituto Nacional de Investigação Veterinária (Veterinary Research Institute)
INNOQ	Instituto Nacional de Normalização e Qualidade (National Institute for Standards and Quality)
IPA	Instituto de Produção Animal (Institute of Animal Production)
KULIMA	Organização para o Desenvolvimento Socio-Económico Integrado (Organisation for Integrated Socio-Economic Development)
LDC	Least Developed Country
MADER	Ministério de Agricultura e Desenvolvimento Rural (Ministry of Agriculture & Rural Development)
MINAG	Ministério da Agricultura (Ministry of Agriculture)
MIP	Market Information Point
MP	Ministério de Pescas (Ministry of Fisheries)
MPD	Ministério de Planificação e Desenvolvimento (Ministry of Planning & Development)
MT	Metric Tonnes
MULEIDE	Women's Association for Law and Development
NER	Net Enrolment Rate
NET	Núcleo de Estudos de Terra (Land Studies Nucleus)
NETARD	Network for Agricultural Research for Development - Denmark
NORAD	Norwegian Agency for Development Cooperation
ORAM	Associação de Ajuda Mútua Rural (Association for Rural Mutual Assistance)
PAMA	Programa de Apoio aos Mercados Agrícolas (The Programme for Assisting Agricultural Markets)
PARPA	Plano de Acção de Redução da Pobreza Absoluta (Poverty Reduction Strategy and Plan)
PoDE	Programa para o Desenvolvimento Empresarial (Entrepreneurial Development)

	Programme)
PROAGRI	Programa de Desenvolvimento Agrário (Sector Wide Assistance Programme for Agricultural Ministry)
QAS	Question and Answer Service
RENAMO	Resistencia Nacional de Mocambique (National Resistance of Mozambique)
ROSA	Rede de ONG's/Associações em Serviço na área de Segurança Alimentar (Network of Food Security Organisations)
SACU	Southern African Customs Union
SADC	Southern African Development Community
SDI	Selective Dissemination of Information
SIMA	Sistema de Informação do Mercado Agrícola (Agricultural Market Information System)
SISNE	Sistema Nacional de Extensão Rural (National Rural Extension System)
SPFFB	Serviços Provinciais de Florestas e Fauna Bravia (Provincial Services of Forestry & Wildlife)
SPGC	Serviços Provinciais de Geografia e Cadastro (Provincial Services of Geography & Cadastre)
TAC	Total Allowable Catch
TIA	Trabalho de Inquérito Agrícola (National Agriculture Survey, 1996)
UEM	Universidade Eduardo Mondlane
UFICS	Unidade de Formação e Investigação em Ciências Sociais (Faculty of Social Sciences)
UNAC	União Nacional de Camponeses (National Union of Peasants)
UN/DESA	United Nations - Department of Economic and Social Affairs
UNDP	United Nations Development Programme
VMS	Vessel Monitoring System
WFP	World Food Programme

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Executive summary

Introduction

CTA works primarily through intermediary organisations and partners (non-governmental organisations, farmers' organisations, regional organisations) to promote agriculture and rural development and to deliver its various information products and capacity building services. By partnering with these organisations, CTA seeks to increase the number of ACP organisations capable of generating and managing information and developing their own information and communication management strategies.

In the period 2003 – 2005, CTA undertook a series of needs assessment studies in 21 countries in the ACP Pacific and Caribbean. As a continuation of this process, CTA have now commissioned assessments of the agricultural information needs of 6 countries emerging from prolonged conflict situations in ACP Africa, including Mozambique, which forms the focus of this report.

Objectives of the Study

The objectives of this study are to develop a strategy for CTA's approach to post-conflict countries, to improve the effectiveness of CTA's support for post-conflict countries and to compile baseline data on the status of ICM and ICTs in agriculture and rural development in Mozambique.

Methodology

The country profile was produced through a desk study. This study relied heavily on information available on the internet and additional information was obtained from various institutions in Mozambique, internationally and from key informants. Through the desk study we were able to identify a list of nine key institutions. This list was discussed with CTA and informants in Mozambique and face to face interviews were requested with each institution. Of these, seven of the institutions agreed, whilst one indicated that it would be closing its operations within a year and was therefore removed from the list.

Expected results

This study will provide: 1) an inventory of the status of agricultural information services, institutions and other actors and their needs as they relate to physical infrastructure, information availability and access and human capacity development; 2) an assessment of the current and / or planned interventions of the government and bi- or multilateral agencies in the field of information for agriculture and rural development; 3) an overview of the needs of potential partners for CTA activities and services in terms of building capacity for information and communication management; 4) a short-list of potential partners / beneficiaries for CTA activities and services; 5) baseline data to facilitate subsequent monitoring activities. The study will also provide a framework for CTA to develop a framework for action and fashion a strategy aimed at institutions in countries emerging from conflict situations and provide input into its 2006 – 2010 strategic plan.

Findings

Following the signing of a peace agreement in 1992 to end 16 years of conflict, Mozambique has achieved impressive economic growth and lowered its prevalence of poverty. Sustained by strong foreign investment, real GDP in Mozambique has been growing at rates in excess of 7 percent for the last 4 consecutive years, and per capita income in US dollars has increased by nearly 50 percent between 2001 and 2004. Mozambique's economic growth, however, implies an important transformation in the composition of its GDP, although services remain the dominant sector. The share of industry in total GDP increased to 27 percent in 2004 from about 16 percent in 1996, whereas the share of agriculture decreased to 23 percent from about 30 percent in the same period. The agricultural sector, however, still supports 80 percent of

the economically active population, and agriculture still provides major export earnings from commodities such as prawns and fish, cotton, sugar, timber and cashew nuts. The forestry sector also has an important role in the country, contributing 4 percent of gross domestic product and supplying about 80 percent of the energy used.

There is no unified policy or strategy in Mozambique with regard to the management of agricultural information and broad dissemination networks are not well developed. Institutions that fall outside of the state or donor worlds often find it difficult to get hold of information. Information exchange between institutions tends to be informal rather than structured. Agricultural research generally is restricted by the insufficient number of scientists who can formulate and carry out studies relevant to Mozambican needs.

Budgets for information management tend to be a low priority. In-house capacity for maintaining and troubleshooting computer networks is a constraint; reliance is made upon private companies specialised in IT. Retention of staff at the centre with IT skills, in the face of competition from the private sector, was cited as a problem by all of the state agencies. Building the capacities of in-house staff was therefore felt to be important.

Existing websites, maintained by some of the key institutions vary in their effectiveness as publishing outlets and often tend to be reflections of the institution, its structure and its work programme, rather than being designed specifically to disseminate information, reports, studies, etc. that are produced, or to act as advocacy tools.

Use of radio as a means of disseminating information in vernacular languages is still rather limited. Problems in this respect are the costs of translation and payments for the transmissions. Training in how to pass information on to low literacy groups was also indicated by several agencies. This included training in more effective writing skills and training in how to compile radio programmes and audio visual materials.

There is a general lack of metadata; documentation on who is doing what and types of available information is generally poor. This has a double negative effect. On one hand, potential data and information users have difficulties finding or getting access to relevant information and on the other hand, information suppliers do not know what they have, which prevents better organisation of information for dissemination.

Conclusions

Most of the institutions which we interviewed have fairly well-developed links to relevant sources of information; data on the functioning of markets, prices and production levels in the agriculture and fisheries sectors has vastly improved in recent years. Some of these agencies need information on regional and international markets and production levels. Technical data is still harder to source, particularly in Portuguese.

There are information needs regarding developments in thinking on food security, forms and means of supporting organisations at community level, participatory approaches to resource management, information on low cost technologies for increasing production and conserving produce, on gender, on HIV/AIDS prevention and mitigation strategies and on general rural development issues.

Respondents requested capacity building in information management to increase the effectiveness of their organisations. Government services and NGO staff indicated the importance of training in the analysis of socio-economic data. Training in the use of the internet to obtain information and in the targeting of information by library and documentation services was also a broad need. The design and development of web sites was indicated by many respondents, but it is felt that there is a particular need for support in how to conceptualise these as sources of information rather than just 'publicity'. Training in

effective communication to low literacy target audiences, in the development of extension materials and the use of radio and audio-visual materials is also important.

Recommendations

We recommend that CTA provide support to the development of a national IMC strategy for agricultural information that takes full advantage of the opportunities offered by the new GovNet infrastructure. The ICM strategy should ensure that information is easily available to all stakeholders in rural development. Furthermore, the ICM strategy should prevent a gap from evolving between organisations connected to GovNet and those that are not. Finally, the ICM should provide for communication channels from the rural poor to research organisations and policy makers, to ensure that research and policies are guided by the needs of poor rural households.

We recommend that CTA attempts to increase the amount of information disseminated in Portuguese language, particularly in regard to food security, forms and means of supporting organisations at community level, participatory approaches to resource management, information on low cost technologies for increasing production and conserving produce, on gender, on HIV/AIDS prevention and mitigation strategies and on general rural development issues. We recommend that CTA support short term research activities targeted at Mozambican-specific issues in relation to agricultural production and the conservation of produce.

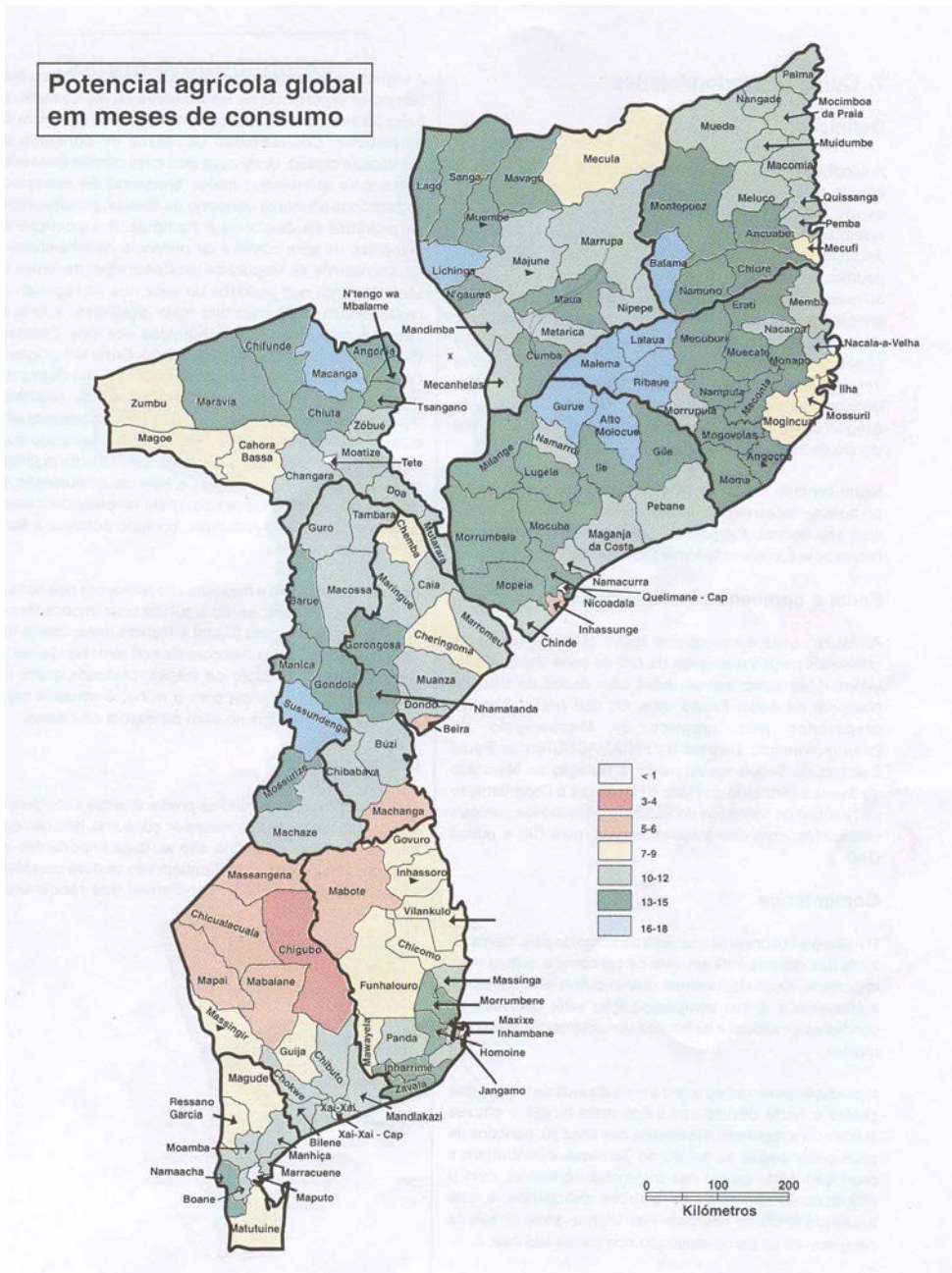
Links should be set up to inform IIAM and DNER about the information needs of poor farmers, women and PLWHA. These links can be set up through members organisations such as ORAM and UNAC, through Farmer Field Schools and through NGOs to which DNER has outsourced extension activities.

We recommend that CTA investigate ways of supporting exchange of experience between organisations involved in training through associations and support to the development of training packages for associations. These should be provided to increase the effectiveness and efficiency of extension efforts in the field. In the long term, the required technical information can be provided to associations through newly developed training packages.

1. INTRODUCTION

1. The Technical Centre for Agricultural and Rural Cooperation (CTA), established in 1983 under the Lomé Convention between the African, Caribbean and Pacific (ACP) Group of States and the European Union Member States, is tasked with developing and providing services that improve access to information for agricultural and rural development.
2. It also aims to strengthen the capacity of ACP countries to produce, acquire, exchange and utilise information in this area. CTA's activities are currently distributed among three operational programme areas / departments:
 - Information Products and Services
 - Communication Channels and Services
 - Information and Communication Management Skills and Systems.
3. CTA works primarily through intermediary organisations and partners (non-governmental organisations, farmers' organisations, regional organisations) to promote agriculture and rural development and to deliver its various information products and capacity building services. By partnering with these organisations, CTA seeks to increase the number of ACP organisations capable of generating and managing information and developing their own information and communication management strategies. The identification of appropriate partners is therefore of primary importance.
4. This country report on Mozambique is part of a series commissioned by the CTA in ACP Africa countries that are emerging from conflict. It is designed to provide the organisation with better insight into the agricultural information needs of institutions in Mozambique and the actions of other agencies in this area (for further background to this exercise please refer to the Terms of Reference in Annex I). The objectives of the needs assessment studies are as follows:
 - to develop a strategy for CTA's approach to post-conflict countries;
 - to improve the effectiveness of CTA's support for post-conflict countries
 - to compile baseline data on the status of ICM and ICTs in agriculture and rural development in the 6 post-conflict countries.
5. The study should assist CTA to improve and better target interventions and activities aimed at potential partners and beneficiaries (including women, youth, private sector and civil society organisations); to have a more informed picture of their needs and aid in the elaboration of a strategy and framework of action.

Figure 1 - Map of Mozambique



2. COUNTRY PROFILE

6. Mozambique covers a surface area of 799,380 square kilometres and shares borders with Tanzania to the north and Malawi, Zimbabwe, South Africa and Swaziland to the west and south. The climate is predominantly tropical, although sub-climates exist as a result of topographical differences.
7. Three broad landscapes can be distinguished within the country: the coastal plains along the length of the country that raise to 200 metres above sea level and cover 44 percent of the territory; the central and northern plateaux (200 to 400 metres), which cover 43 percent of the territory; and the great plateaux and mountain ranges (over 1000 metres), situated in the interior, covering the remaining 13 percent of the territory.
8. Rainfall is far higher and less erratic in the central and northern regions where the majority of agricultural production is concentrated. Most agriculture is rain-fed, and in the southern and central provinces of Mozambique rain falls erratically and most of it only during a short period of the year.
9. Most of the population, officially projected at 19.42 million at mid-2005, live within a 40 kilometre wide coastal strip extending over 2,000 kms. The war resulted in increased pressure on land near major towns of the coastal zones and safe rural areas, but there has since been considerable out migration to areas of origin. In 2003 about 46.5% (UNDP, 2005) – 47.8 % (CIA, 2006), of the Mozambicans was literate; many more men (63.5 percent) than women (32.7 percent) are literate. The official language is Portuguese. The most widely spoken language is Emakhuwa (26.1%), followed by Xichangana (11.3 percent) and Portuguese (8.8 percent) (See Table 37).
10. The first democratic multiparty elections were held in 1994. These elections and the two subsequent elections in 1999 and 2004 were won by FRELIMO. RENAMO is the largest opposition party. In 2004 RENAMO and other opposition parties formed an Electoral Union, but still failed to beat FRELIMO.
11. Following the signing of a peace agreement in 1992 to end 16 years of conflict, Mozambique has achieved impressive economic growth and lowered its prevalence of poverty from 69% in 1997 to 54 % in 2003 (Ministry of Planning and Finance, 2004). Sustained by strong foreign investment, real GDP has been growing at rates in excess of 7 percent for the last 4 consecutive years, following the severe economic setback caused by the devastating floods in 2000. Per capita income in US dollars has increased by nearly 50 percent between 2001 and 2004 (See Table 33). Inflation, which fell to 15 percent in 1997 from over 50 percent the previous year, averaged about 13 percent in 2004 and reached little over 11 percent in March 2005.
12. This growth has been driven by new ‘mega projects’ (aluminium smelters and a gas pipeline to South Africa), investment from neighbouring countries, buoyant donor support and agricultural growth. During this period, there was a remarkable agricultural “catch-up,” and fast expansion in the tourism, construction, and manufacturing sectors.
13. Mozambique’s economic growth implies an important transformation in the composition of its GDP, although services remain the dominant sector (about 48 percent in 2004). The share of industry in total GDP increased to 27 percent in 2004 from about 16 percent in 1996, whereas the share of agriculture decreased to 23 percent from about 30 percent in the same period (see Table 21).
14. The agricultural sector, however, still supports 80 percent of the economically active population, whereas the service sector (including government) employs 15 percent of the workforce, with industry absorbing just 5 percent. Agriculture still provides major export earnings from commodities such as prawns and fish, cotton, sugar, timber and raw cashew nuts (See Table 28, Table 29 and Table 30).

15. Agricultural sector growth, which averaged 6.6 percent a year between 1996 and 2004, was lower than average overall GDP growth. The main contributors to growth were food grains (maize), sugar, tobacco, cashews, and cotton. Recent figures indicate that the growth rate in agriculture in 2005 was 1.8 percent, a slow down in comparison to 2004 when the rate of growth was 9 percent.

2.1 *Agriculture, Fisheries and Forestry*

2.1.1 Agriculture

16. Estimates in the last few years indicate that about 90 percent of the area under production in Mozambique has been cultivated by the family sector. The remaining 10 percent of the cultivable land is used by other agents: agribusiness firms (particularly sugar, tea, cotton and, more recently, tobacco), state/private joint ventures, cooperatives and private individual farmers (see Table 11 and Table 22). Tobacco, cotton, cashew nuts and sugar constitute the main agricultural exports by value (see Table 28).
17. Mixed farming systems predominate in the family sector (see Table 13 and Table 14). Predominant crops are cereals, including maize and rice, and cassava, beans and groundnuts (see Table 15 and Table 17). Animal ownership is increasing again, after stocks were depleted by the war (see Table 18).
18. The livelihood systems in Mozambique differ substantially between different zones. Where agricultural potential is limited, livestock, fisheries, or other income sources become important. There are traditional systems of credit and savings (*xitique*) and the sharing of the labour (*mafunana*) in many areas. Land-poor households may find themselves working the fields of others (*ganho-ganho*).
19. In rural zones agriculture is the main activity of almost all people (95 percent), with only 2.6 percent having commercial, service or public sector employment as their primary activity (Bias & Donovan, 2003). Much agricultural production never reaches the market. Although 80 percent of the poor grow maize in Mozambique, only 8 percent of them participate in the selling of maize, growing most maize to meet subsistence needs (MINIPLAN, UEM, and IFPRI, 1998).
20. Many households engage in petty trading, with small tables or stalls along the road, selling homemade beverages or small consumer goods. Remittances become important in the South and in the border areas with Zimbabwe, although recent economic problems in Zimbabwe have undoubtedly affected this source of funds for consumption.
21. Tree crops, grown within the family sector farming systems, provide the country with an important source of foreign exchange earnings each year and provide the growers with a valuable contribution to their household food security. Table 19 shows the estimated number of peasant farmers (in those provinces with a coastline) growing coconuts and cashews. The numbers are particularly significant in the heavily populated littorals of Inhambane and Gaza, where the contribution to the household food economy of such crops is substantial, since individual farm families own 100 to 200 trees. The registered annual harvest of coconuts and cashews is around 240,000 and 50,000 tonnes respectively.
22. Mozambique's agricultural sector has suffered from several changes in direction since independence, as well as massive disruption from the war. At the end of the war, the severe lack of basic services and rural infrastructure was a binding constraint on agricultural growth.
23. Many rural areas with large populations and considerable agricultural potential have extremely difficult access to the national road network. Under such conditions transport costs are high and farm gate prices low. Rural trading is beset with problems of

inadequate transport infrastructure and transport availability at costs that make Mozambican trading comparatively disadvantaged. A number of studies have identified market access and prices as the most important determinant for agricultural production.

24. While there has been considerable investment in the Ministry of Agriculture and Rural Development (*Ministério de Agricultura e Desenvolvimento Rural – MADER*) over time by various donors, this has not yet produced a sustainable approach with demonstrable impact on the three million poor farming households (Whiteside, 2003). From 1993 a new sector wide approach known as PROAGRI was developed with an initial phase running from 1998 to 2003¹. A second phase, PROAGRI-2 is at an advanced stage of preparation. Independently of PROAGRI a new agricultural strategy was approved in 1995. As a result of government restructuring following the national elections of 2004, the Ministry was relieved of its responsibility for rural development and became simply the Ministry of Agriculture (MINAG)².
25. Key institutions within the Ministry of Agriculture include the National Directorate of Planning and Economics (DE), Centre for Agricultural Documentation and Information, the Department of Statistics (DEST), the National Directorate of Lands (DINAT) and the National Directorate of Forestry and Wildlife (DNFFB)³.
26. A merger of six research institutes, formerly under the tutelage of MINAG, and the national Directorate for Rural Extension (DNER) has recently been effected. This has brought together the Agronomic Research Institute (INIA), the Veterinary Research Institute (INIVE), the Institute of Animal Production (IPA), the Forestry Research Centre (CEF), the Centre for Agricultural Documentation and Information (CDA) and the Centre for Agricultural Training (CFA), under a single autonomous institute called the Mozambican Institute of Agricultural Research (IAM)⁴. This has apparently resulted in a more cohesive strategy for agricultural research in the country, a more integrated approach to research issues, an increased focus on key areas for research and on streamlining the use of scarce resources, both financial and human.
27. Restructuring plans also include the proposed merger of the Office for the Support to Commercial Agriculture (GPSCA); the National Sugar Institute (INA); the Institute of Mozambican Cotton (IAM), the National Cashew Institute (INCAJU) and the Mozambican Cereal Institute (ICM) into a single autonomous Institute for Commercial Agriculture (CEPAGRI – approved formally in April 2006).
28. It is envisaged that the current national institutes linked to specific products will gradually disappear and transfer their mandate to national producer associations, which, presently do not exist or are in embryonic form⁵ (ICC, 2002). The main mandate of

¹ The objective of PROAGRI was to move the Ministry of Agriculture from an unmanageable ‘project driven’ institution to one in which there was a more unified policy and implementation framework, with a critical mass of donors, and the Ministry, signing up to a jointly agreed approach.

² Rural development responsibilities were passed to the Ministry of Planning and Development (*Ministério de Planificação e Desenvolvimento - MPD*).

³ The two directorates, DINAT and DNFFB, are due to be merged into a single Directorate for Land & Forestry.

⁴ In 1998 the directors of four of the existing research institutions had already established a coordinating body (*Conselho Técnico de Investigação Agrária - CTIA*) and appointed an Executive Secretary.

⁵ “*Durante o estudo não se encontrou quaisquer exemplos de Associações de Produtores em pleno funcionamento em Moçambique. Neste contexto, uma Associação de Produtores é definida como “uma associação de nível nacional, que representa os interesses de todos os produtores de uma determinada cultura”. Não se trata de instituições para-estatais tais como INCAJU ou INA, mas a àquelas associações do sector privado onde os produtores pagam um jóia e uma quota anual de membro, que é normalmente calculada sobre a sua produção, e recebem em troca uma prestação de serviços da associação*” (ICC, 2002).

CEPAGRI will increasingly focus on the development of the commercialization of additional products.

29. Within the Directorate of Rural Development in the Ministry of Planning and Development the Programme of Assistance to Agricultural Markets (PAMA) aims to facilitate increased access to agricultural markets by smallholder farmers. It has an extensive network of links to farmers associations, NGOs, agribusiness companies and associations and other government institutions. It has a national programme with focal points in several provinces
30. At the University Eduardo Mondlane (UEM) relevant institutions include the Faculty of Agronomy and Forest Engineering (FAEF) and the Land Studies Nucleus (NET). Important national-level NGOs operating in the sector include the National Association of Peasants (UNAC⁶) and the Association for Rural Mutual Assistance (ORAM).
31. In line with the general objectives and guidelines of PROAGRI, the GoM developed a National Extension Master Plan (1999–2003) that called for the development of an Integrated National Extension System, SISNE (*Sistema Nacional de Extensão Rural*). MINAG, through the National Directorate of Rural Extension (DNER), proposes collaboration through out-sourcing to other organisations interested in providing extension, such as NGOs, farmers' organisations, private sector commercial farmers, registered groups of certified extension workers and other private sector entities (ODI, 2001).
32. Some smallholder farmers are organized into associations, although even basic estimates of total membership are unknown. Many of these associations are not formalised and therefore have no specific legal personae (ECI, 2002). Many have been started with assistance from NGOs as a response to the lack of market opportunities for rural farmers and the problems they encountered in dealing with the newly liberalised market. The movement has grown rapidly in some areas; associations in Nampula are now organised into local and district I and a producer owned marketing company (with assistance from CLUSA). Many organisations have worked through associations and I as a means of reaching communities for a variety of reasons, such as agricultural extension – widening their remit from the earlier marketing focus (Whiteside, 2003).
33. There are two key specialized lending institutions operating in rural areas: the Mozambican Association for Rural Development (AMODER) and the Society for the Promotion of Small Investments (GAPI).
34. AMODER, has been providing marketing credit to traders in five provinces of Mozambique since 1997. Loan volumes range from US\$3,000 to US\$100,000. While AMODER has identified solid clients, mainly medium-sized traders, at least 10 percent of their portfolio is non-performing, and its on time repayment rate is 55 percent. Both figures would send a commercial operation into bankruptcy. AMODER can provide this service through support from donors, and profits from other activities (e.g. the sale of used clothing).
35. GAPI is a registered company, and the result of a German project that was in effect a challenge fund. GAPI follows a partnership approach with the government and has an investment portfolio of \$15.5 million that emphasises SMMEs. GAPI is well organised with 44 staff serving the organisation.

2.1.2 Fisheries

36. The fisheries sector in Mozambique plays an important role in the economy of the country, contributing 13 percent of export income. The fisheries sector as a whole

⁶ UNAC has active unions in four provinces (Maputo, Manica, Nampula and Sofala). However, linkages between UNAC and the individual associations are limited, and UNAC has not been able to provide any services on a consistent basis to much of its membership (ECI, 2002).

accounts for 40 percent of Mozambique commodity exports, bringing in approximately \$100 million dollars a year, although this is declining (see Table 29). Shrimp exports (frozen directly on trawlers and shipped mainly to Japan and the European Community) represent almost 90 percent of Mozambican fisheries production. The international market for Mozambique's fish products is wide, and includes Africa (Democratic Republic of the Congo, Malawi, Republic of South Africa, Zambia and Zimbabwe), Asia (Hong-Kong and Japan) and Europe (Italy, Portugal, Spain and the United Kingdom) (see Table 30).

37. Estimated employment levels within the industrial and semi-industrial sub-sectors are 1,500 in total, 1,250 of these occupied by nationals. Artesenal fishing provides a livelihood for more than 50,000 families, and supplies food for a large part of the population (see Table 25); 55 percent of the population are estimated to eat fish on a weekly basis. Inland fisheries are a relatively small-scale activity, with the estimated potential fish catch in rivers and lakes at 34,000 tonnes. In recent years, due to massive investment from the private sector, catches in Lake Malawi/Niassa (the largest natural lake) and in the artificial Lake Cahora Bassa, have increased dramatically. This is largely due to the high price of small pelagics (*kapenta*) in the regional market (Malawi, South Africa and Zimbabwe). In 2001, the landings of *kapenta* in Mozambique from Lake Cahora Bassa totalled around 12,000 tonnes.
38. The main research institutions are the Fisheries Research Institute (*Instituto Nacional de Investigação Pesqueira – IIP*), in charge of marine and inland fisheries research and the Small-Scale Fisheries Development Institute (*Instituto de Desenvolvimento de Pesca de Pequena Escala – IDPPE*), responsible for the introduction of new fishing techniques, fish processing and socio-economic studies. IDPPE, together with IIP, is also responsible for data collection.
39. The research institutes fall under the tutelage of the Ministry of Fisheries (*Ministério das Pescas*), which also oversees two central level Directorates (Fisheries Economy and Fisheries Administration), the Provincial Directorates and two relevant Departments (Fish Inspection and Aquaculture). The Ministry of Fisheries also has a Centre for Information and Training (*Centro de Informação e Treino – CIT*). The Ministry grants access to fishery resources under a licensing system for commercial vessels, which are allocated quotas under a TAC (Total Allowable Catch) system.
40. There is also a Fisheries Administration Commission, which is responsible for matters concerning fisheries management and administration. At Provincial and District levels there are Co-Management Committees, whose main function is to assist the local fisheries administration. These local organs comprise representatives from the local Fishing Community Councils, private sector companies, the research and extension authorities, the local maritime authority fish processing units and local fish product traders. In contrast to the forestry sector (see below), these committees operate without formal legislative recognition, but are generally considered to be more entrenched and to have greater de facto power and influence.
41. The fishing fleet of the shrimp fishery consists of 133 vessels (59 industrial trawlers and 74 semi-industrial) targeting shallow water shrimps and a further 18 trawlers catching deepwater prawns (*gamba*). The shrimp quota for 2003 was 9,285 tonnes, with 8,120 tonnes allocated to industrial fishing and 1,165 to the semi-industrial fleet. The major operators are Mozambican joint ventures with Spanish and Japanese companies: Efripel (Maruha, Japan), Pescamar (Pescanova, Spain) and Crustamoz (Spain). These companies have sufficient resources to support modernization, in contrast to the semi-industrial fleet (consisting mostly of national companies) which are limited by capital constraints.
42. Shrimp raised in Mozambique are *Peneaus monodon* (tiger shrimp) and *P.indicus* (white shrimp). These two species also represent a major part of the fisheries catch.

Three aquaculture farms are currently producing shrimp, with two undergoing major extensions.

2.1.3 Forestry

43. The total area of Mozambique, which is covered by forest or other woody vegetation, amounts to about 62 million hectares, or 78 percent of the land area. Productive forests incorporate vegetation types where trees and bushes occupy at least 25 percent. Classified as having high, medium, or low productivity, the productive forests cover in total an area of about 20 million hectares, or 25 percent of the terrestrial surface of Mozambique (Saket, 1994 – see Table 12). The forestry sector has an important role in the country, contributing 4 percent of gross domestic product and supplying about 80 percent of the energy used.
44. These woodlands do not have the type of closed canopy characteristics associated with Africa's tropical rainforests. Rather, Mozambique's forests are more savannah-like and are far less dense with marketable trees. While forests were generally protected by the civil war in Mozambique, the cessation of fighting brought with it an escalation in logging. In the immediate post-war period, timber businesses re-emerged in Mozambique and intensive logging began to take place throughout the country.
45. Timber exports from Mozambique are largely dominated by the export of round wood logs to the markets of the Far East (see Table 31 and Table 32).
46. Natural forest management has only recently been started with the reintroduction of forest concessions in 2000, after the approval of new forest and wildlife legislation in 1999. Concessionaires are required to complete forest inventories and to have technically sound management plans based upon these. Concessions are awarded by the National Directorate of Forestry & Wildlife (DNFFB), whose Provincial Directorates are responsible for tax and license fee collection and enforcement of regulations.
47. The government also issued hundreds of 'simple licences' as a means of quickly kick-starting the forestry sector and generating revenue to rebuild the country. Under this simple licence system, a set small fee based on land area is paid to the government in turn for permission to cut up to 500 cubic metres of timber per year. Simple licences are renewable annually, and operators are only required to submit a nominal management plan and a cursory inventory of the trees within the proposed cutting area.
48. A Consultative Forum on Forestry was created in 2001, to enable the DNFFB to interact more with stakeholders from the sector. This is heavily dominated by industry representatives; NGO participation has been weaker and less consistent. A Forest Governance Learning Group (FGLG), established with support from the International Institute of Environment & Development (IIED) and funding from the EU, is coordinated by UEM. It aims to address some of the policy and institutional issues related to forestry, poverty alleviation and livelihood issues.

2.1.4 Pastoralism

49. Livestock numbers are low, as herds have yet to recover from the losses incurred during the civil war. The livestock census in 2003 is contained in Table 18. Livestock are now mainly present in the central and south regions and often in mixed farming systems. Water buffalo are favoured over cattle in the tsetse fly regions.

2.2 *Information and Communication Management Capacity*

50. Information about agriculture in Mozambique is available from a number of sources, principally the MINAG and related institutions. The importance of this sector within the PARPA and the GoM 5 year programmes mean that the monitoring capacity of performance in the sector has grown considerably in the last few years; this sustained

focus and the availability of resources have meant improvements both in the quality and the quantity of information available.

51. However, there is no unified policy or strategy in Mozambique with regard to the management of agricultural information and broad dissemination networks are far less developed. Institutions that fall outside of the state or donor worlds often find it more difficult to get hold of information (except statistics, which are well-provided for through INE – see below). Information exchange between institutions tends to be informal rather than structured.
52. Agricultural research generally is restricted by the insufficient number of scientists who can formulate and carry out studies relevant to Mozambican needs. There are less than 500 professional level employees in the research system; just over 100 have degrees and very few have graduate level training adequate to formulate and supervise research studies. Though some technicians have BSc degrees, most have the equivalent of a secondary school education.

2.2.1 Resources Available for Information Management

53. Most of the institutions interviewed have access to sufficient hardware and software resources to enable the efficient management of information. Strategies and policies on how to actually make the most effective use of these resources are often less well developed.
54. Government institutions (IIP, IDPPE, GPSCA, SIMA) all have capacity for research, evaluation and handling statistical information. Personnel often have formal training in a field related to the activity of the institution, not in a field related to statistics or information management. SIMA, with a specific mandate to analyse and disseminate market-related data was the only agency with an in-house statistical analysis capacity. Of the NGOs, UNAC has a functional unit dedicated to documentation and information and ORAM had one person at national level with related responsibilities.
55. Budgets for information management tend to be low priority, except where this falls as part of a specific mandate of the institution (e.g. SIMA, IIP, IDPPE). Licence costs for software were cited as a problem (IIAM) and UNAC and IIP both mentioned that they were looking at the possibility of converting to open-source software in order to overcome this problem. The use of pirated software, particularly publishing packages, was said to be widespread because of this problem.
56. During the last few years, most agencies have completed conversions to computerised information management technologies. Many of these have been developed in isolation from one another and data sharing between institutions is informal and ad hoc rather than structured and systematised.
57. For example, many spatial information systems in Mozambique were planned on the basis of applying remote sensing and/or GIS technologies for data acquisition, update, management, visualisation and cartography⁷. Development plans within different agencies were not designed with an emphasis on smooth data sharing, but more to respond to the specific needs of the host organisation.
58. SIMA and the GPSCA are both examining ways in which their information services can become self-sustaining. They recognise that sustainability will require investment from both public and private sectors. The “public good” nature of their information means that basic budgets will need to come from public sector finances, but private sector demand for services can help ensure that this funding is available (through lobbying)

⁷ GIS in Mozambique is still mostly used only as a mapping tool and not an analytical tool. Digital data is usually produced to create clear printouts of geographical information, but when compared to the original paper maps, there is a limited amount of added value.

and can provide complementary funding of its own (through, for example, subscription services)⁸.

2.2.2 Data Collection and Management

59. As a central level clearing house for statistical information, the National Institute of Statistics (INE) is responsible for collecting, gathering, storing, analysing and disseminating information on economics, statistics, demographics and social issues. The Institute has an inter-ministerial status and manages data from different ministries. It delegates some of its mandate to different ministries; the Economics Directorates in the MINAG and MP are officially mandated to collect agricultural and fisheries information respectively and they, in turn, depend upon SIMA, IIP and IDPPE.
60. Most of the institutions (IIP, IDPPE, GPSCA, UNAC, ORAM, SIMA, IIAM) maintain databases in one form or another. These range from EXCEL-based systems (the provincial level SIMAPs) to ACCESS-based (IDPPE) or more powerful and sophisticated relational databases and statistical packages (SIMA). Many of these have been designed or programmed with foreign technical assistance and internal capacity to adapt these or make programming changes is less well developed (although some respondents reported that it is becoming easier to outsource these tasks to local private sector service providers).
61. The collection of raw data and information from local sources is a major role for several institutions (IDPPE, IIP, SIMA, UNAC), either relating to production levels in the various sectors (IIP, SIMA, GPSCA) or social data on target groups (IDPPE) or membership (ORAM, UNAC). Networks of informants exist in the various sectors; SIMA, for example, relies upon a network of 44 informants in 22 locations throughout the country to collect information on agricultural trade.
62. In comparison, the forestry sector is much less well served in this respect, although PROAGRI II includes plans for the development of a management information system for the forest sector, based on criteria and indicators for sustainable forest management as well as a market information system for forest products and services.
63. Some institutions are looking to harness ICTs in order to improve the collection of this data. The IIP, for example, maintains a database for recording information on catches, fish size, etc., which is presently being developed to allow its provincial delegations to access and update it through the internet. This is being developed by a private company using ORACLE. It is presently ACCESS-based and information has to be transferred in most cases by disk to Maputo, creating delays. IIP also has plans to develop the utilisation of GIS, with assistance from NORAD. A Vessel Monitoring System (VMS), using GPS transmitters on fishing boats, has also been under development for a long time (by the Ministry of Fisheries) but is not yet operational.
64. Sometimes there is a need to join information being collected by different institutions; for example, the IIP collects data on artesanal fisheries sector production and catches, whilst the IDPPE holds social data in respect to the sector. A full analysis of the sector requires this information to be jointly analysed but institutional challenges exist in this respect.
65. Many of the institutions have LANs but these are used more to share internet access and distribute e-mails. They are not used to provide individual users with access to corporate data banks, except in the case of IIP which has an intranet service linking the three separate buildings where personnel are located. In-house capacity for maintaining and troubleshooting these networks is a constraint; reliance is made upon private companies

⁸ The present trend of most public agencies is to sell information on an incremental cost basis. DINAGECA, that holds spatial data and information about land, and the National Institute of Statistics (INE) have documentation centres open to the public for the purchase of maps and reports.

specialised in IT and problems arise because of the response times involved, although these have improved in recent years.

2.2.3 Publishing and dissemination capacity

66. Regular bulletins or newsletters are common forms of publication amongst many of the agencies but vary in content and style. IIAM produces a Quarterly Bulletin with information about the Institute's activities and a monthly IIAM Noticias, with news mainly for internal consumption. The IIP produces bulletins specifically designed to inform policy-makers in the fisheries sector regarding important developments and SIMA, GPSCA and IIAM do the same for the agricultural sector. UNAC produces a bulletin more for lobbying and advocacy purposes and to share information between its members. Information dissemination policies are not always clearly formalised.
67. Distribution of publications also varies. IIAM prints and distributes via hard copies, but not many by e-mail. SIMA distributes their Quente-Quente weekly publication on prices and agricultural trade largely by e-mail.
68. Several organisations maintain a website and others mentioned plans to develop one, or to make more effective use of this means of publishing and disseminating information in the future. The existing sites vary in their effectiveness as publishing outlets and often tend to be reflections of the institution, its structure and its work programme, rather than being designed specifically to disseminate information, reports, studies, etc. that are produced, or to act as advocacy tools.
69. The IIP website, for example, provides a list of publications but the publications themselves are not available for download. It does, however, provide a linked access to Fishbase, an independent database providing detailed information on population dynamics, genetics, morphology, trophic ecology, physiology, ecotoxicology, reproduction, etc.⁹.
70. The UNAC website, recently established, provides access to PDF versions of its Quarterly Bulletin and has news on events and developments but UNAC recognise that it could be used more effectively. SIMA publications are made available through the website of Michigan State University; they would like to have a web portal of their own but are locked into the MINAG website which has been out of service for a long time. Some agencies (GPSCA, ORAM) have well-developed plans for websites but have not yet launched them. A common problem mentioned was the time, resources and focus needed for maintaining the sites.
71. Several agencies produce reports and studies on particular areas of specialisation. Production standards vary widely.
72. There is relatively little use of radio for dissemination of information, given that this ought to be the ideal medium for reaching low literacy target groups in the rural areas. Almost 50 community radio stations have been set up since 1990 under a US \$11 million media project by the UN Educational Scientific and Cultural Organisation (UNESCO) aimed at strengthening democracy and governance. Radio Mozambique (RM) also has provincial transmissions in vernacular languages.
73. Problems in this respect are the costs of translation and, in the case of RM, payments for the transmissions. SIMA is the only agency that mentioned well-developed plans to use the provincial RM stations and transmissions in vernacular languages to disseminate their information. According to them the service will be very expensive for them to run and they will only be able to introduce it in the provinces (Tete and Zambézia) where they have direct bilateral assistance (from the Rockefeller Foundation) specifically for this purpose.

⁹ Froese, R. and D. Pauly. Editors. 2006. FishBase. World Wide Web electronic publication. www.fishbase.org, version (02/2006).

74. ORAM, through their delegation in Nampula have used community radios in the past. IIAM have made no use of the radio, but have used the television to disseminate information about the institution and what it does (again, as with many of the websites, this is more in the nature of publicity than information provision). Most agencies in fact recognise that this is a weakness.
75. A significant problem cited by IIAM is that of transferring information generated by research and through demonstration plots, to the field level extension services. Because of the lack of communication channels between the research labs of IIAM and extension services and between NGOs and MINAG, the lessons learned from research and experience are sometimes written into reports but not in a form that is easily accessed by those who need the information.
76. For poor rural farmers, the local extension worker is the only source of information about agriculture, whether technical or commercial. The Mozambican extension services are supply driven and extension messages are defined by DNER. The extension messages are based on the government agricultural policy rather than established farmer's needs. Government extension workers thus provide farmers with information that is not necessarily adapted to the problems that farmers face. Extension workers of NGOs provide information that is relative to the goals of the project their organisation is implementing. And although project formulation is often based on a needs assessment among the target group, projects often focus on only a few aspects of rural livelihood. Coordination between government and NGO extension workers tends to be weak.
77. There are no formal mechanisms through which extension workers (either from government or NGOs) can channel farmer's information needs to IIAM or extension policy makers. As a result, IIAM is not aware of the information needs of poor farmers.
78. The use of cell phone technology for the dissemination of information is non-existent, except for commercial purposes. UNAC gave the example of the Kenya Agricultural Commodities Exchange (KACE) in Kenya, where rural farmers are able to send a coded SMS and receive by return relevant market information on crop prices in various areas¹⁰; they pointed out that the only similar service in Mozambique related to access to information on winning numbers in the national lottery. SIMA is also very interested in trying to develop a similar service for distribution of the information that they collect. In a few districts in Sofala, blackboards have been erected in district capitals to communicate current market prices. Not all of these are up to date, and their use to farmers who live a day's travel away from the district capital is limited.

2.2.4 Agricultural Libraries

79. Many of the agencies maintain their own libraries or documentation centres. Some (IIAM, IDPPE, IIP, SIMA) are well-organised and have cataloguing software that enables easy location and access to relevant holdings whereas other institutions are aware that they have lots of information that is available but hard to locate (UNAC, ORAM).
80. At IIAM, which houses the main agricultural research library in the country, most of the books are outdated, having been donated by various institutions rather than purchased by the institution. Subscriptions to journals are limited due to a lack of funding.

¹⁰ KACE is harnessing ICT technology to disseminate market information and intelligence. It has developed an SMS market information service branded as SMS Sokoni in partnership with the Safaricom Limited, a leading mobile phone service provider in Kenya. A farmer anywhere in the country where the Safaricom network exists can in easy steps access market information like commodity prices in different markets, who is buying or selling what commodity, at what prices, where and when, as well as access extension messages using their mobile phones. The user receives and pays for the SMS messages to the service provider. SMS is easy to use, reliable, convenient and low-cost. The information is updated everyday and hence is most current and timely to the user.

81. Acquisition policies and distribution systems are rarely present. Only IIP had a system through which the staff could be alerted to relevant acquisitions based on a user profile registered in the library. This was also the only institution where an in-house library journal was produced on a monthly basis. At other institutions, none of the respondents was involved in the acquisition of books by their libraries and none was aware of a strategy within the organisations with regard to acquisition of information.
82. The IIP was also the only institution which was maintaining databases (e.g. MozFish) and general catalogues on all relevant documents. It also has a special collection of theses, dissertations and placement reports produced by staff and students.
83. On-line access to virtual libraries is also limited. The IIAM are in the process of subscribing to The Essential Electronic Agricultural Library (TEEAL) but this was not yet operational. IIP stated that the costs of obtaining on-line access to relevant technical and scientific journals were prohibitive. In addition, many technicians have difficulty reading scientific texts in English or French, while the supply of textbooks and scientific journals in Portuguese is relatively limited.
84. However, a recent USAID-sponsored course in Electronic Access to Research (Curso de Formação de Formadores –Training of Trainer Seminar) was attended by library staff from IIAM, some provincial agricultural department staff and other institutions (mainly in the health sector – 15 in total). This was designed to increase access to global online research in agriculture and was the first of its kind to be conducted in Portuguese.

2.2.5 Communication

85. Information is exchanged regularly between the central offices of most of the public agencies and their provincial delegations. Capacity constraints for many Mozambican institutions are largely in the provincial delegations; access to communications (phone and internet) was cited as a common problem still, despite improvements to the coverage over recent years. Skill levels are lower in the provinces and as a consequence, provincial offices are often used to collect local data, but the analyses are processed in Maputo. The results are seldom communicated back to provincial or district level. The lack of data at district and provincial level weakens the decentralisation process that has been recently initiated.
86. Radio communication has become much less important in recent years but is still used by some agencies (IDPPE, IIP).

2.3 *Agricultural Information Services*

87. The Documentation and Information Centre at the MINAG was cited by some agencies as a primary source of relevant information (SIMA, GPSCA, IIAM). Availability of agricultural information through book-shops is very rare, and people have to go directly to the producing agencies to buy the products. General information on agricultural issues is disseminated by the press and radio (see page 64).
88. The internet is a commonly used source of information and many of the institutions recognise its importance. Access is a constraint and some respondents mentioned the time-consuming nature of trying to find relevant information. Most sites which were cited as important sources are maintained outside of Mozambique and form part of globally-focussed information services (e.g. the FAO sites); this means that although the information relevant to Mozambique is there, it can take time to locate. There are only poorly developed and maintained Mozambican portals providing access to information within the country.
89. Some institutions (IIP, UNAC) stated that sourcing books and magazines was a problem due to language, costs and the difficulty of sourcing locally through booksellers. IIP and

IIAM have examined the feasibility of subscribing to on-line access systems for journals but found the costs prohibitive.

90. All of the institutions have well-developed international links that serve as important sources of relevant information. In fact, in some cases the links to international sources of data are stronger than national inter-linkages between institutions. UNAC and ORAM in particular mentioned the fact that their international partners provided quicker and better access to information regarding important Mozambican policy issues than they were able to get from the state institutions.
91. Technical information relevant to a particular sector is also largely sourced through these international links or from specialised national organisations (e.g. on gender). Most organisations seem to have quite well-developed networks in this regard. Some of examples of sources that were given include: ICRAF, CIAT, ICRISAT, SYMMIT, IUCN (IIAM), CAFOD Policy Unit, Food First, Bank Information Centre, Movimento Sem Terra (UNAC), INFOSA, ICSF (IDPPE), FAO, OSCF (IIP), NET, AMRU, Fórum Mulher, FDC, Grupo Moçambicano da Dívida, Link, G20, Kulima, UNAC, ROSA (ORAM), SAFEX, CBOT, BC, Banco de Mozambique (SIMA). More complete information is contained in Annex 3.2.
92. English language, however, represents a constraint in sourcing information for many agencies. Some institutions, such as the IIP, have an in-house training focus on English language skills.
93. Most networking activities in state institutions in Mozambique are based on informal and personal exchanges between technicians. Communication between these institutions is relatively easy. Organisational links are facilitated by the concentration of most personnel in the capital, where telecommunication and transportation services are quite efficient.
94. NGO groups tend to have more formalised information exchange networks. ORAM and UNAC are part of the G20 (which is the civil society grouping that forms part of the Poverty Observatory for monitoring performance on the realisation of PRSP objectives), of ROSA (*Rede de ONG's/Associações em Serviço na área de Segurança Alimentar* – Network of Food Security Organisations) and LINK (a more general NGO network organisation which was strong a few years ago but is becoming less important, according to informants).
95. Earmarked support to IIP from NORAD provides access to financial support for technicians from IIP to attend long and short-term training and international seminars and workshops. UNAC and ORAM have bilateral support in this regard but other agencies mentioned the difficulty of accessing funds for such purposes.
96. Many agencies recognise that they are not specialized in areas such as HIV/AIDS and gender, but that these issues have an important impact on their work and planning of interventions. UNAC, for example, considers them “fundamental questions in the development and future of the movement and the community”. They therefore collaborate with other allies, partners and NGOs in the development of strategies, and in the implementation of interventions directed toward these issues; these include the Mozambique Media Women’s Association (AMCS), the Women’s Association for Law and Development (MULEIDE) and the Association of Women in Judicial Careers (AMMCJ).
97. There is a general lack of metadata (except in IIP, which produces regular updates on its information holdings, both nationally and regionally). Documentation on who is doing what and types of available information is generally poor. This has a double negative effect. On one hand, potential data and information users have difficulties finding or getting access to relevant information and on the other hand, information suppliers do

not know what they have, which prevents better organisation of information for dissemination.

3. OVERVIEW OF ICM ISSUES IN AGRICULTURE AND RURAL DEVELOPMENT: CAPACITY, SERVICES AND NEEDS

3.1 *Current and Planned Donor Interventions*

98. The Government of Mozambique is apparently amongst the first African countries to have identified information and communication technologies as a key development tool. It has established an ICT Policy Commission (www.infopol.gov.mz), a high-level task force on information technology, chaired by the Prime Minister. It has also adopted an ICT Policy and Implementation Strategy, following an extensive, nationwide consultative process.
99. In 2003 the GoM, with assistance from the Italian Government, Development Gateway and the UN/DESA announced the building of a Government Electronic Network (GovNet). The first stage of GovNet is to include a secure intranet for internal communications and a set of web portals to improve quality and coverage of public services delivery and increase participation in government decision-making processes. It is to involve 21 government departments in Maputo, including 800 new workstations, new process management guidelines, training and the identification of steps for expanding GovNet to new ministries and to the municipalities. The assessment and formulation of GovNet was conducted by the UN/DESA.
100. The United Nations Development Programme (UNDP) and the Italian government have also signed an agreement which establishes mechanisms of multilateral financing for a project to develop Mozambican human resources in the sphere of Information and Communication Technologies (ICTs). Apart from training trainers, civil servants and government leaders in matters linked to ICTs, this project also envisages setting up training centres in the north, south and centre regions of Mozambique. The project, to be implemented over a period of two years, is a component of a wider programme on new technologies undertaken since 2002 by the government's Technical Unit for the Implementation of Computer Policy, with the support of UNDP.
101. In addition, a series of SADC e-Government workshops are being held in Botswana during 2006, under the auspices of the Regional Impact of Information Society Technologies in Africa (IST-Africa, an EU-supported initiative). The broader plans of this initiative include the development of training modules in ICT for Agriculture and for holding training workshops in Mozambique.
102. These initiatives, however, mirror the general preoccupation, identified also in the institutions that formed part of the present survey, with ICT rather than ICM issues. While creating infrastructure is a starting point, although expensive, it is perhaps the easiest part. It is more complex to design and stimulate processes through which individuals, organizations, communities and countries create capacities to use information effectively in their local contexts and for their needs. This might be particularly relevant to the flow of analysed data from central level back to provincial and district level.
103. At the level of subsistence farmers, FAO and MINAG have concluded a pilot project with farmer field schools. This approach encourages farmers to state their needs and to identify and test possible solutions in collaboration with an extension worker. The project has now entered its second stage, working in twelve districts. A similar approach is used with AIDS orphans in the Junior Farmer Field and Life schools, currently still in the pilot phase. These two initiatives might form the start of a change to demand driven extension methods.

104. More attention therefore needs to be paid to innovative ways of applying content to the specific information needs of communities and local groups. As Vitor Amaral, CEO of Syslog and managing editor of Imensis (www.imensis.co.mz) stated:

“...the use of portal content, if to be truly successful, needs to move away from plugging and playing, chatting and surfing, getting information from abroad, with everything converging to one language, one culture and one market. It needs to be a two-way empowering system for businesses and communities, collaborating on social networking, producing local content, facilitating diversity of languages, cultures and opinions.”¹¹

3.2 Institutional Needs Analysis

3.2.1 Current Information Needs

105. Current information needs (see Table 1) broadly reflect the institutional focus of the organisations. They vary from needs related to statistical data on markets, production and prices (e.g. GPSCA, SIMA, UNAC) to technical data on new and improved technique in particular sectors (e.g. IIAM, IIP, UNAC). A particular emphasis was on information about low cost technologies that would help to improve productivity and especially conservation of products (both agricultural and fish). This last preoccupation reflects that fact that distances and access to markets are major problems for a majority of the target groups of these organisations.
106. Both government organisations, especially IDPPE, and NGOs stressed the need for information and training about the creation, support and management of farmers’ or fisherfolk’s associations and the need for information about micro credit systems for agricultural and local economic activities. ORAM needed information on institutional strengthening activities to improve its own internal organisational effectiveness whereas UNAC and IDPPE were focussed more on organisational forms within the target groups.
107. The NGOs expressed the fact that they needed information regarding policy developments in Mozambique and that, despite the existence of consultative processes between government and civil society, this information was still hard to come by and often more easily sourced by their international partners.

Table 1 – Frequently mentioned current information needs

Type of information for current programmes	Who needs it
Micro Credit in Agriculture	UNAC, ORAM
Policy developments in Mozambique	UNAC, ORAM
Starting, managing and supporting associations	UNAC, ORAM, IDPPE
Technical information on fisheries management	IIP, IDPPE
Developments in Food Security Analysis	UNAC, GPSCA
Communication and Rural Extension	UNAC, ORAM
Management of Natural Resources	ORAM
International agreements impacting on Mozambique	UNAC, IDPPE
Prices, costs and production levels in national, regional, international markets	GPSCA, UNAC, SIMA
Catch levels on industrial vessels and in artesanal fisheries sector	IIP, IDPPE
Budget information from Government	UNAC, ORAM
Institutional Development	UNAC, ORAM, IDPPE

¹¹ Quoted in Artur Manhica, “Who’s Currently Using the Internet?”, 2002

Type of information for current programmes	Who needs it
Use of low-technology techniques for improving productivity	UNAC
Improving storage and conservation of agricultural and fishery products	UNAC, IDPPE
Sustainable agriculture in the tropics	IIAM, UNAC
Information on Gender	UNAC, ORAM, IDPPE
Financial Management	ORAM, IDPPE, UNAC

3.2.2 Future Information Needs

108. The needs for different information in the future are contained in Table 2 below.

Table 2 – Frequently mentioned information needs for the future

Type of information for future work	Who needs it
Background information on Food Security	SIMA
Information on regional markets	SIMA, GPSCA
Reliable statistics on Mozambique	UNAC, ORAM
Background information on Rural Extension	UNAC, ORAM
Post harvest technologies	UNAC
GIS	IDPPE
HIV/AIDS prevention (and mitigation)	UNAC, ORAM
Technical information on fresh water fisheries and fish breeding	IDPPE, IIP

3.2.3 Capacity Building Needs

109. Although many organisations appear to have identified sources of relevant information and have built up libraries or documentation centres many expressed the need for better-organised information. This relates to both hard copy holdings in the documentation centres, where systems for searching and assessing the relevance of books and journals are not well-developed (with some exceptions) and to the use of the internet. Many organisations felt that the internal capacities for targeting information to the end-users could be better developed.
110. The better use of organisational networks (LANs) as means of organising and making information widely available throughout organisations was a need identified by some organisations. Problems in this regard in the past were indicated as issues of maintenance, integrity and discipline in the use of such networks (SIMA in relation to the MINAG system).
111. The better management of information was also expressed by agencies that highlighted the problem of the lack of organised feedback from people attending conferences and seminars. IDPPE and IIAM staff both expressed the need for the systematic feedback of information.
112. Staff from Maputo-based offices are often responsible for providing training and support to provincial staff on information management and use of software. Retention of staff at the centre with IT skills, in the face of competition from the private sector, was cited as a problem by all of the state agencies. Building the capacities of in-house staff was therefore felt to be important.
113. There is a general capacity problem across the agricultural research sector. In IIAM, an agency of approximately 1,100 employees, only about 10 percent have degrees and less than 4 percent have a Master of Science or PhD. The small number of trained scientists, the preponderance of scientists and technicians located in Maputo and the need for

research on topics specifically relevant to Mozambique together make a compelling case for capacity building assistance in agricultural research. The need for research that is closely tied to the Mozambican agricultural reality and the need to see near-term results from the research, highlight the need for intensive, short duration activities rather than long-term placements.

114. Training in how to pass information on to low literacy groups was also indicated by several agencies. This included training in more effective writing skills and training in how to compile radio programmes and audio visual materials.
115. Funding shortages were indicated in various areas. Mostly this related to the costs of purchasing airtime on the RM provincial stations which broadcast in vernacular languages (SIMA, UNAC, ORAM). Publishing software to enable the better production of newsletters was also mentioned (IIAM) as being prohibitively expensive.
116. A lack of capacity and focus on the monitoring and evaluation of the impact of information dissemination initiatives was also mentioned, particularly by SIMA, which is keen to look beyond just the number of users of its services. ORAM and UNAC are also under pressure from their donors to begin to build this focus into their programmes. Indicators at present tend to focus on the completion of activities (e.g. the number of seminars on land rights held at a district level) rather than the evaluation of the impact of these. Capacities to design and conduct evaluations of this nature are limited.
117. Mozambique now has access to data of much better quality than in the past but there is a lack of analytical skills to process, understand, evaluate and draw conclusions from this data. Capacity building directed towards data and statistical analysis was mentioned by several organisations (SIMA, UNAC, GPSCA, IDPPE).
118. Training in building and maintaining web sites was a common expressed need. IDPPE was one of the few organisations that recognised the lack of skills in terms of conceptualising how the organisation could use the internet and a website as a more effective means of distributing information, rather than as just a reflection of the institution and its work.
119. Access to hardware was not mentioned as a general problem, except by IIAM. Access to the internet and to cellphone networks was mentioned as a problem outside of the provincial capitals. The lack of facilities in the library for photocopying and scanning information and documents was also mentioned by IIAM.

Table 3 – Frequently mentioned training needs

Training needed	Which organisation	Target group
Building web sites and use of the Internet	IDPPE, UNAC, ORAM, IIP	Communication & information departments
Effective writing	UNAC, ORAM, IDPPE	Communication & information departments
Information Management	ORAM, IIAM, UNAC	Communication & information departments
Analysis of socio-economic data	SIMA, GPSCA, UNAC	Research departments
Design of questionnaires and databases	IDPPE, UNAC, ORAM	Research departments, Communication & information departments
Concepts and Tools For Internet Use and Searching	IDPPE, ORAM, IIAM	All departments
Strategies for Teaching Others and Using Electronic Resources	SIMA, ORAM, UNAC	Communication & information departments, extension workers

Training needed	Which organisation	Target group
Use and production of audio-visual training material	UNAC, ORAM, IDPPE	Communication & information departments, extension workers
Monitoring of impact of information dissemination strategies	SIMA, UNAC, ORAM	Monitoring and evaluation units
Making radio programmes	ORAM, UNAC, IDPPE,	Communication & information departments, extension workers
Financial management	ORAM	Management
Support to associations	IDPPE, UNAC, ORAM	Extension workers
Micro credit	UNAC, ORAM, IDPPE	Extension workers
Land rights	UNAC, ORAM	Extension workers
Participatory approach to natural resource management	ORAM	Extension workers
Use of GIS	IDPPE, IIP, GPSCA, SIMA	Communication & information departments, Monitoring and evaluation units

Table 4 – Frequently mentioned resource needs

Resource needs	Which organization
Broad band internet access	ORAM, IIP, IDPPE (especially in relation to provincial delegations)
Local Area Network and server	IIAM
Library	ORAM, UNAC
New/extra computers at head quarters	IIAM
New/extra computers at provincial level	ORAM, UNAC
Copying and scanning facilities	IIAM
Publishing software	IIAM
Information management specialist	ORAM, IDPPE
Librarian	ORAM
Journalist/professional writer	UNAC, IDPPE

4. CONCLUSIONS AND RECOMMENDATIONS

4.1 *Conclusions*

120. Mozambique signed a Peace Agreement ending a long period of conflict in 1992. Since that time there have been rapid changes to the institutional environment, significant changes to the structure of the economy and legislative frameworks, fairly stable economic growth and slow but increasing growth in agricultural production, particularly in the cash crop sectors.
121. Donor support for Mozambique has been consistently high during this period and is set to increase, particularly through the funding of the budget and the application of the Poverty Reduction Strategy and Plan (PRSP). Although this reflects well on the reputation of the country as one of the more responsible in terms of the correct application of donor assistance, it places increasing strains on a bureaucracy which has generally low levels of professional skills and qualifications.

4.1.1 Information Needs

122. The types of information needed by the respondents can be divided in three categories. Firstly, both government and NGO organisations need information on how to strengthen associations of farmers and fisherfolk, and on successful implementation of micro credit schemes. This information should be available in a format that project managers can use and adapt for extension workers. Secondly, they need technical information, specifically on low-cost technologies to increase production and to conserve perishable products (e.g. fish) and prevent post harvest losses. This information should be available in a format that can be adapted to the target group by employees at provincial or district level. Thirdly, there is a need for information about markets, prices and production.
123. All three types of information needed reflect the types of difficulties that poor farmers face when they want to market their surplus production: they need to associate to be able to negotiate fair prices with the few traders visiting remote areas, they need to safeguard the quality of their products in the face of long transport periods and they need to know what prices are paid at different markets to chose their best option.
124. In the near future, organisations need information on developments in rural extension and food security. This information is needed to enable organisations to formulate their strategies and to improve their service delivery to the target group.
125. Especially at provincial and district level, there is a need for reliable statistical information on rural development and agricultural production. With ongoing decentralisation, district and provincial directorates need more and better information on which to base their decisions, while NGOs need the same information be a relevant discussion partner for the government in forums that discuss district development plans.
126. Furthermore, there would be a high payoff to investments in improving internet access, given the improved information content in agriculture sector.

4.1.2 Capacity Building Needs

127. Over the last years Mozambique has made significant advances in the production and analysis of data. As a result many data are available at central level. And with the implementation of GovNet, all this information is in principle available. However, the challenge that organisations such as INE and SIMA now face is to make these data easily available to clients such as provincial and district directorates, NGOs and associations. This means that INE and SIMA have to catalogue the information in their databases in such a way that information can easily be found. These catalogues then have to be made available to the intended target groups.

128. To achieve this goal, these organisations will need training in data management and data storage skills. Furthermore, training in the design of user-friendly online search utilities will be necessary. Unfortunately GovNet appears to be focused on Maputo, which will make provision of information to provincial and district directorates suboptimal until GovNet is extended to these areas. Limited provision of resources to extend GovNet to agricultural centres not included in the current GovNet plans may greatly increase the use of GovNet to agriculture information provision.
129. To maintain the quality of the data that are being produced, training in design and analysis of questionnaires should be provided to the relevant personnel of INE and SIMA. Some staff will also have to be trained in training interviewers. Furthermore, this process will have to be accompanied with the provision of information on new insights in the analysis of food security, vulnerability, rural livelihoods and cross cutting issues such as HIV/AIDS and gender.
130. IIAM and DNER need to improve the information flow between the two organisations in order to create a demand driven extension service. This includes capacity building within DNER to provide information obtained from research in formats adapted to Mozambican farmers and fisher folk, and to translate problems identified by farmers into requests for information that can be processed by IIAM.
131. DNER and NGOs all need training in effective communication with their target group. Staff will need to be able to design communication strategies that take into consideration that literacy rates are still low, especially among vulnerable groups such as women and PLWHA (People Living With HIV/AIDS). Communication should preferably be through direct contact with extension workers and radio programmes in the mother tongue of the target group.

4.1.3 Potential partners and beneficiaries

132. The organisations UNAC, IDPPE and ORAM are potential partners for CTA in Mozambique. UNAC and ORAM both have direct links with farmers and farmers' associations/organisations and with government and donors in Maputo. These organisations can thus on the one hand provide information about farmers needs to the relevant organisations in Government and on the other hand provide information produced by organisations in Maputo to farmers. IDPPE can perform the same role for fisher folk. Strengthening the information management capacity of these organisations will thus benefit poor rural households, the ultimate target group of CTA.
133. All three organisations can provide technical inputs and human resources. Within IDPPE this, as well as possible financial contributions will depend on the political will within the ministry of fisheries. ORAM and UNAC might be able to provide financial input through contributions from other donors. All organisations have a track record of satisfactory and timely delivery of services.
134. The ability of IDPPE to maintain services and activities started with CTA's input will depend mostly on the political will to make human resources available for information management with a pro-poor focus. Both ORAM and UNAC are reasonably strong organisations with a broad member base and good standing among donors and government organisations. Both receive support from a range of donors (see annex 3). They are therefore capable of maintaining services that are started with input from CTA.

4.2 *Recommendations*

135. CTA is well placed to develop a range of targeted training opportunities regarding information management to staff in relevant Mozambican institutions. These include the design and analysis of questionnaires and other monitoring mechanisms to analyse the effectiveness of information provision, in data management and data storage skills, in

the design of user-friendly search utilities and in library skills and the organisation and provision of information widely throughout organisations.

136. We also recommend a focus on providing training opportunities related to the building of analytical skills (to process, understand, evaluate and draw conclusions from data) and capacity building directed towards statistical analysis.
137. We recommend that CTA provides support for research activities that are closely tied to the Mozambican agricultural reality. These should be intensive, short duration activities rather than long-term placements and could be conducted by staff in various institutions as part of their on-going work.
138. CTA should focus on developing a databank of information and training opportunities in Portuguese about the creation, support and management of farmers' or fisherfolk's associations, micro credit systems for agricultural and local economic activities and low cost technologies that would help to improve productivity and the conservation of products. Development of the CTA Q&A service to raise awareness of the service and strengthen it's capacity to serve Portuguese-speakers should be considered.
139. Since GovNet appears to concentrate on ICT rather than ICM and will first be implemented at central level, there is an urgent need to formulate an ICM strategy that takes full advantage of the possibilities offered by GovNet, but also addresses its weaknesses. Without a good organisation and clear presentation of the available information, stakeholders in rural development will not be able to take full advantage of the opportunities provided by GovNet.
140. The ICM strategy should also prevent that a 'digital information gap' develops between those institutions that have access to GovNet and those that do not. Especially organisations at district level run the risk of remaining outside the information flow. Now that decentralisation is reaching to district level, district directorates need information on which to base their local policies and all stakeholders need access to information to be able to contribute meaningfully to the formulation of district development plans. Stakeholders in the decentralisation process should therefore also be invited to support the formulation of the new ICM strategy. CTA should consider providing support for these stakeholders to enable them to participate fully in strategic developments.
141. The ICM strategy should also address the lack of communication between poor farmers, women and PLWHA on one hand and the research institutions and developers of extension programmes on the other. Ideally, the information needs of poor farmers, women and PLWHA should guide the research and development conducted in IIAM and DNER. Member organisations such as ORAM and UNAC can act as intermediaries between the farmers and the research and Development organisations. Staff of UNAC and ORAM will need training to effectively communicate with both farmers and researchers and policy makers.
142. Communicating the results of research and investigation to the smallholder requires formal linkages between different services. For example, there is a need to transfer information and research results between the scientists of IIAM and the extension workers in MINAG, in NGOs and private sector organisations. SIMA is also an example of where institutional linkages need to exist with government and private sector extension services and with NGOs¹². But extension workers, through DNER should also provide IIAM with information about the most important problems faced by (subsistence) farmers.

¹² During the course of this assessment the SIMA and UNAC were assisted in linking up to make the Quente-Quente publication available through the UNAC website.

143. Although these linkages must be addressed at an institutional level, there are some informal ways to approach the issue of communication between different institutions; it is suggested that there are opportunities to conduct training and capacity-building interventions that address academic and skills needs of both extension and research workers and that through involving different institutions there will be a cross-fertilisation process that will add value to both research and extension activities.
144. Advantage can be taken from the rapid increase in farmers associations (see p. 9). Several organisations, such as ORAM, UNAC, CARE and others already channel training through these associations. Improving these training packages and improving feedback from trainees for development and refinement of new training packages can improve knowledge transfer to poor farmers and provide a better insight into farmers' information needs. This could be achieved through exchange of experiences among stakeholders and training. With better feedback from trainees, training through associations can become demand-driven rather than supply-driven.
145. Strategies should be explicitly pro-poor and recognise and support women's rights and needs. This can be achieved through a demand driven approach to extension. In this approach, groups of farmers/women discuss and analyse their problems with an extension worker. The extension worker then refers the information requests (s)he cannot satisfy to the next (provincial) level. This continues until the answer is found and then relayed back to the group. Groups often test several alternative solutions to decide which one works best for them. Ideally, this information should also be send back to provincial level and then feed into the IIAM database. To achieve this, extension workers of NGOs and the government need to be trained in demand driven and participatory extension techniques.

Table 5 – Recommendations based on identified needs that should be addressed immediately

Identified needs	Recommendation
Lack of statistical information and of information about government policies	Develop an Information Management Strategy that uses GovNet to provide this information to
Lack of communication between IIAM and extension services	
Training in survey design and analysis	Provide training to staff of SIMA, IDPPE

146. In the next two years, organisations will need training in the use of the Internet to make the most of GovNet and other internet sources. Organisations like SIMA and IDPPE need to learn how to make their databases available to clients in a user-friendly manner via the portals of GovNet and other Internet channels. They also need to know where to obtain information. Organisations such as UNAC and ORAM need to know how to use the databases available to them and how to locate sources of information.

Table 6 – Recommendations based on identified needs that should be addressed in the next two years

Identified needs/problems	Recommendation
Lack of training in use of internet	Training in the use of internet, aimed at providing information (SIMA, IDPPE) or obtaining information (UNAC, ORAM)
Lack of data analysis skills	
Need to give adequate support to associations and micro credit schemes	Provide training and information on associations and micro-credit schemes
Inadequate extension skills	Train trainers in participatory and demand driven extension techniques

Identified needs/problems	Recommendation
Inadequate writing skills	Train staff in effective writing
Lack of technical information on management of natural resources and protected areas; lack of technical information for most common crops	Provide access to technical information and training in location of similar information
Lack of ICT resources at provincial level	Help source funds to obtain ICT resources and lobby for accelerated extension of GovNet

147. In the long term, organisations will need to learn how to find technical information that a target group needs on the internet and how to transform this into messages adapted to the target group. A system to provide farmers with market information will also have to be designed. The systems used in Kenya (information kiosks located at rural market centres, known as Market Information Points – MIPs) and the use of SMA messages via mobile phones in Kenya are examples.

Table 7 – Recommendations based on identified needs that should be addressed in the next five years

Identified needs	Recommendation
Lack of technical information on freshwater fish breeding, fresh water fisheries and marine aquaculture	Provide technical information on fresh water fish breeding etc.
Lack of information on international markets and value adding through agro-processing	Provide access to sources with information with data on international markets and value-adding

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ANNEXES

ANNEXES

I. Terms of Reference

<p style="text-align: center;">ASSESSMENT OF AGRICULTURAL INFORMATION NEEDS FOR CTA'S PRODUCTS AND SERVICES IN POST-CONFLICT ACP AFRICAN STATES</p>
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E Introduction

The Technical Centre for Agricultural and Rural Cooperation (CTA) was established in 1983 under the Lomé Convention between the ACP (African, Caribbean and Pacific) Group of States and the European Union Member States. Since 2000, it has operated within the framework of the ACP-EC Cotonou Agreement.

CTA's tasks are to develop and provide services that improve access to information for agricultural and rural development, and to strengthen the capacity of ACP countries to produce, acquire, exchange and utilise information in this area. CTA's programmes are organised around three principal activities: providing an increasing range and quantity of information products and services and enhancing awareness of relevant information sources; supporting the integrated use of appropriate communication channels and intensifying contacts and information exchange (particularly intra-ACP); and developing ACP capacity to generate and manage agricultural information and to formulate information and communication management (ICM) strategies, including those relevant to science and technology. These activities take account of methodological developments in cross-cutting issues (gender, youth, information & communication technologies – ICTs, and social capital), findings from impact assessments and evaluations of ongoing programmes as well as priority information themes for ACP agriculture¹³.

CTA's activities are currently distributed among three operational programme areas / departments:

- Information Products and Services
- Communication Channels and Services
- Information and Communication Management Skills and Systems

These operational departments are supported by Planning Corporate Services (P&CS) which is charged with the methodological underpinning of their work and monitoring the ACP environment in order to identify emerging issues and trends and make proposals for their translation into programmes and activities. This current exercise, therefore, falls within the mandate of P&CS.

2. Background

CTA works primarily through intermediary organisations and partners (non-governmental organisations, farmers' organisations, regional organisations, ...) to promote agriculture and rural development and to deliver its various information products and capacity building services. By partnering with these organisations, CTA seeks to increase the number of ACP organisations capable of generating and managing information and developing their own information and communication management strategies. The identification of appropriate partners is therefore of primordial importance.

¹³ Priority information themes for ACP agriculture have formed the basis of various several studies, workshops and seminars bringing together various stakeholders, organisations and institutions active in the field of agriculture and rural development. The documents (or extracts thereof) will be provided to the consultants.

The “Evaluation of the Implementation of the Mid-Term Plan (1997 – 2000)” and the subsequent “Evaluation of CTA’s Strategic Plan and Framework for Action 2001 – 2005” emphasised the need for CTA to develop a more pro-active approach and elaborate criteria for decision-making with regard to the choice of partner organisations and beneficiaries. While the evaluations note the relevance of CTA’s activities as demonstrated through the partners and beneficiaries appreciative responses, concern is expressed about: the extent to which CTA’s activities are relevant to and reach the poor, gender awareness and how to identify potential partners especially in the independent sectors. As a direct response to these concerns, CTA undertook a series of needs assessment studies in 21 countries in the ACP Pacific and Caribbean in the 2003 – 2005.

The third in the series of needs assessment studies will focus on the needs agricultural information needs of 6 countries emerging from prolonged conflict situations in ACP Africa, namely: Angola, Mozambique, Guinea Bissau, Sierra Leone, Eritrea and Rwanda. The results of these studies as well as those already conducted in the Caribbean and Pacific will feed into the elaboration of CTA’s 2006 – 2010 strategic plan.

3. Justification and main issues to be addressed

Institutions, economic, social and physical infrastructure a.o. are altered by conflict, depending on the scale, duration and type of war. At one extreme, formal political, social and economic institutions may be completely destroyed, while the importance and type of informal institutions may be changed¹⁴. This statement is largely true of the 6 post-conflict countries forming the object of this study (Angola, Mozambique, Guinea Bissau, Sierra Leone, Eritrea and Rwanda), which are also characterised by:

- over 70 percent of the population in rural areas and dependent on subsistence agriculture for their basic needs;
- a high level of food insecurity;
- important numbers of displaced populations;
- high numbers of de-commissioned soldiers who are in need of disarmament, social rehabilitation and re-insertion;
- illiteracy and low school enrolment / attendance numbers;
- poor access to basic services such as potable water and electricity not to mention information and communication technologies.

These countries are presently at different stages of the post-conflict rehabilitation process with some being more advanced than others (e.g. Mozambique vs. Rwanda and Angola) and have been receiving support from various bi- and multilateral agencies in this regard. CTA has therefore commissioned this study in order to gain better insight into the agricultural information needs of institutions in these affected countries and the actions of other agencies in this area.

4. Overall objective

To contribute to economic development through capacity building in the area of agricultural information management and knowledge sharing.

F Specific objectives and scope of the study

The objectives of the study are as follows:

- to develop a strategy for CTA’s approach to post-conflict countries;
- to improve the effectiveness of CTA’s support for post-conflict countries

¹⁴ ARON, J., 2002. *Building Institutions in Post-Conflict African Countries*, Discussion Paper N° 2002/124, University of Oxford, U.K.

- to compile baseline data on the status of ICM and ICTs in agriculture and rural development in the 6 post-conflict countries.

The study should assist CTA to improve and better target interventions and activities aimed at potential partners and beneficiaries (including women, youth, private sector and civil society organisations); to have a more informed picture of their needs and aid in the elaboration of a strategy and framework of action. The study should also highlight where there are specific needs for CTA's products and services thereby enabling improvement in the delivery of the same.

G Methodology

The consultant will use a combination of qualitative and quantitative rapid appraisal methods for the six countries including:

- the desk review of available literature and information sources including other donor interventions in the field of agricultural information and capacity (human and physical) development;
- the conduct of face-to-face interviews with relevant stakeholders / concerned parties and if possible, group discussions;
- the limited use of questionnaires.

The rapid appraisal approach will allow a general overview of the key issues and company / organisational profiles on a per country basis and may give rise to more in-depth studies as and when needed in the future.

H Expected results / output

The expected results will include the following elements:

- an inventory of the status of agricultural information services, institutions and other actors and their needs as they relate to physical infrastructure, information availability and access and human capacity development;
- an assessment of the current and / or planned interventions of the government and bi- or multilateral agencies in the field of information for agriculture and rural development;
- an overview of the needs of potential partners for CTA activities and services in terms of building capacity for information and communication management;
- a short-list of potential partners / beneficiaries for CTA activities and services;
- baseline data to facilitate subsequent monitoring activities.

It is also expected that this study will provide the framework for CTA to develop a framework for action and fashion a strategy aimed at institutions in countries emerging from conflict situations and provide input into its 2006 – 2010 strategic plan. The direct output is one main report per country not exceeding 30 pages (excluding annexes) according to the following table of contents:

Main report

List of Acronyms

1. Executive summary
2. Introduction
3. Country profile – summary structure and economic characteristics with particular attention to agricultural sector (includes fisheries and forestry):
 - 3.1 Summary of how agriculture, fisheries and forestry is organised in the country
 - 3.2 Summary of the information and communication management capacity
 - 3.3 The current source of agricultural information and services (synthesis of Annex 3)

4. Overview of ICM issues in agriculture and rural development: Capacity, Services and Needs
 - 4.1 Current and planned donor interventions
 - 4.2 Institutional needs analysis
 - 4.2.1 Information needs
 - 4.2.2 Capacity building needs (skills, training, media, ICT, equipment)
5. Conclusions and recommendations
 - 5.1 Conclusions
 - 5.2 Recommendations

Annexes

1. *Terms of reference*
2. *Country profile*
 - 2.1 General agricultural profile (from available documentation)
 - 2.1.1 Size of agricultural population (male / female / youth)
 - 2.1.2 Farmed land, forests, fishing areas
 - 2.1.3 Agricultural systems
 - 2.1.4 Agriculture in the economy (percentage GDP)
 - 2.1.5 Main agricultural produce and secondary products
 - 2.1.6 Main export markets
 - 2.1.7 Trade agreements that include agriculture
 - 2.1.8 Sectoral policy related to agriculture, fisheries and forests
 - 2.2 Socio-economic profile (from available documentation)
 - 2.2.1 Total active population, demographic breakdown
 - 2.2.2 Literacy level and languages
 - 2.2.3 Access to services (health, schools, electricity)
 - 2.2.4 Rural urban drift
 - 2.3 Media and telecommunications (update / check)
 - 2.3.1 Newspapers, periodicals, magazines, radio stations, television channels,
 - 2.3.2 Telecommunication services (fixed, mobile, etc.)
 - 2.3.4 Computers and Internet access
3. *Profile of institutions*
 - 3.1. List of all local, national and regional institutions involved in agriculture and rural development activities, including private sector and civil society organisations, with name, contact details, type and role of institution.
 - 3.2 Select list of key institutions involved in agriculture and rural development, with extensive data and information on the institution, the problems faced and why it is considered a key actor
4. *List of persons / institutions interviewed*
5. *Bibliography*

8. Reporting

The country reports will not exceed 30 pages (excluding annexes). The annexes should include the various sections mentioned above.

I Timing

- Draft report of annex 2 to be submitted to CTA within 2 months after contract signature.
- Complete draft final report is to be submitted within 4 months after contract signature by CTA
- Final report due two weeks after receipt of comments from CTA.

J Expertise needed

The **national consultant** should have a university degree or equivalent by experience. In addition, he/she should have at least 10 years experience in field of agriculture, rural development or social / economic sciences. He/she must have in-depth knowledge of the agricultural sector in his/her country and be able to identify key players and institutions / organisations active in this area. Some knowledge of information sciences would be an added advantage. The ability to communicate and write clearly in English or French is essential, while knowledge of at least one of the local languages for communication / interview purposes is an added advantage.

In addition to the skills above, the **overall coordinator** is expected to be fluent in both English and French, have some knowledge of the 6 countries forming the object of this study, have demonstrated experience in coordinating studies with several consultants, and in producing synthesis reports.

The overall coordination will be carried out by Ms Christine Webster, Deputy Head, Planning and Corporate Services CTA.

K Specific tasks

The **national consultant** is expected to undertake the following tasks in the specific country:

- Desk review of available and relevant literature on agriculture and rural development;
- Conduct interviews with stakeholders in agriculture and rural development sector;
- Disseminate questionnaires and compile results obtained;
- Liaise with the overall coordinator and CTA throughout the process
- Write and submit draft final and final reports according to the stipulated table of contents.

The **overall coordinator** is expected to:

- Supervise the national consultants;
- Guide and monitor their execution of the country studies;
- Answer technical queries from national consultants, review their reports and prepare technical and editorial comments for the 6 countries;
- Prepare a draft and final overview report according to the stipulated table of contents.

12. Implementation schedule (CTA)

- Preparation/Finalisation of ToR; Identification/ short-listing of (potential) consultants; Call for offers: September – mid November 2005;
- Selection of consultants & contractual arrangements: mid to mid December 2005
- Briefing: January 2005
- Start date of contract: 19 December 2005
- Implementation period 19 December – 30 June 2006
- End date of contract: 30 June 2006

13. Key documents to be made available to consultants

Documents include:

- Cotonou Framework Agreement
 - Excerpts of relevant sections of CTA's Strategic Plan and Plan of Action (2001-2005)
 - Annual Reports
 - Documents on priority information themes identified for the African region
 - Documents on products & services provided by CTA
-

II. Country Profile – Mozambique

II.1 General agricultural profile

II.1.1 Size of agricultural population (male / female / youth)

According to the statistics of the INE the urban population in 1997 was 4,454,859 or 29.2 percent (census 1997) and 4,594,406 or 28.6 percent (adjusted census data¹⁵). The rural population was 10,823,475 or 70.8 percent (census 1997) and 11,481,302 or 71.4 percent (adjusted census data).

The total economically-active population of those who were 15 years or older accounted for about 5.9 million people in 1997. That corresponds to 69 percent of the total population aged 15 years or older. According to gender, about 74 percent of the males and about 67 percent of the females were economically active.

In rural areas, the rate of the economically-active population is higher than in urban areas, because the agricultural sector absorbs the majority of the population above the age of 15. In rural areas, the agriculture, forestry and fisheries sectors comprise 87 percent of the male and 98 percent of the female population aged 15 years or over; in urban areas, this is 25 percent and 63 percent, respectively.

Mean annual population growth rate is estimated at 1.7 percent. The following tables therefore show a rough estimate of the size of the agricultural population.

Table 8 – Age structure of the adjusted total population of 1997

Age group/1997	Total	%Total	Male	Female
All	16,075,708	100	7,703,031	8,372,677
0-14	7,195,867	44.8	3,611,975	3,583,892
15-49	7,381,482	45.9	3,383,833	3,997,649
49+	1,498,359	9.3	707,223	791,136

Source: INE. 1999. CD-ROM: Censo 97. II Recenseamento Geral da População e Habitação. Resultados Definitivos. Maputo: INE

Table 9 – Age structure of the estimated total population of 2006

Age group/2006	Total	%Total	Male	Female
All	18,709,349	100	8,964,999	9,744,351
0-14	8,374,747	44.8	4,203,715	4,171,032
15-49	8,590,771	45.9	3,938,198	4,652,573
49+	1,743,831	9.3	823,086	920,746

Table 10 – Estimated Agricultural Population 2006

2006	Total	Male	Female
Total pop. 15+	10,334,602	4,761,283	5,573,319
Rural dwellers (@70.8%)	7,316,898	3,370,988	3,945,910
Economically active		2,932,760	3,866,992

Source: Authors own estimates

¹⁵ On the basis of the 1997 Population and Housing Census (IIRGPH) results, the total population was adjusted from 15,278,334 to 16,075,708.

However, figures from the FAOSTAT and World Bank's World Development Indicators for 2004 state that the agricultural labour force was higher than this in 2003, placing it at 7,837,000, or 81 percent of the total labour force.

II.1.2 Farmed land, forests, fishing areas

It is estimated that of the total land area of 78.6 million ha, about 46 percent of this (36 million hectares) is considered suitable for arable use (see Table 11). However, only some 4.25 million ha, or a little over 10 percent of the arable land, are estimated to be cultivated. The World Bank estimates that over 75 percent of all land used for crop production is classified as land used for shifting agriculture.

In 2005, the impact of the droughts and floods, in combination with outbreaks of infestations and diseases, resulted in the loss of 7% of the area sown nationally. Around 265,000 families were affected, out of a total of around 3.5 million.

It is argued that sustained increases in agricultural incomes depend upon investment in more intensive methods of land use that will involve various combinations of animal power and manure, water management, better seeds, chemicals and mechanical cultivation. Present use of agricultural inputs is low (see Table 20). Only 4.2 percent of households have land partially or totally irrigated (urban households are more likely to use irrigation than rural ones).

A recent study on rural land holdings observed that, although Mozambique was supposedly land abundant, the average per capita holdings were less than 0.3 hectares (Jayne et al, 2001). This study also presented empirical evidence of the considerable disparities in incomes and land allocation at the local level and advanced the proposition that the following processes were likely to continue:

“(1) farm sizes were likely to decline over time;

(2) landlessness and near-landlessness would emerge as increasingly important social and economic problems unless growth in the non-farm sectors could be substantially increased; and

(3) given existing agricultural technology and realistic projections of future productivity growth potential, large segments of the rural population would be unable to climb out of poverty through agricultural growth on their own farms” (Jayne et al, 2001).

Various reports of the total number of farm holdings yield estimates in the range 3.1 to 3.2 million in the period 2000-03 with an average cultivated area of about 1.35 ha per holding. In 2000 there were about 4,500 holdings of more than 10 ha plus a further 50,000 holdings of 5 to 10 ha.

On aggregate, holdings with more than 5 ha of cultivated land account for a little less than 12 percent of the total area under cultivation.

Table 11 – Land Use by Province (km²)

Province	Total area	Cultivable area	Land use in 1995				
			Permanent Agriculture	Shifting Agriculture	Grassland	Wooded Grassland	Shrub
Cabo Delgado	82,625	50,000	148	18,760	1,684	8,280	4,692
Gaza	75,709	4,000	2,760	14,100	6,724	15,760	11,252
Inhambane	68,615	9,000	672	15,336	1,748	8,284	2,832
Manica	61,656	29,000	68	11,456	2,404	11,524	8,092
Maputo	26,358	5,000	1,668	6,984	2,784	3,184	2,732
Nampula	81,606	48,000	864	43,524	796	2,876	2,060
Niassa	129,061	84,000	40	22,124	2,344	14,608	15,976
Sofala	68,018	22,000	836	10,336	7,072	10,840	8,648
Tete	100,724	49,000	16	16,724	4,940	18,176	19,256
Zambézia	105,008	60,000	3,072	31,876	5,060	6,612	4,000
Total	799,380	360,000	10,144	191,220	35,556	100,144	79,540

Note:

Grassland is defined as land covered with non-woody vegetation. Wooded Grassland (WG) consists of grassland with a woody component that covers no more than 10 percent of the area. Shrub (S) is defined as land with a predominant woody component of between 0.5 and 3 m.

Source: World Bank Mission estimates based on FAO and INE data.

Table 12 – Productive Forest Area and Official Estimate of Production Potential

Province	Productive Forest (ha)	Allowable Cut (m ³)	Harvest Potential (m ³ /ha)
C. Delgado	2,958,895	67,592	0.023
Gaza	1,437,162	13,141	0.009
Inhambane	1,752,026	20,790	0.012
Manica	1,046,734	21,369	0.02
Maputo	488,213	3,503	0.007
Nampula	1,822,636	54,410	0.03
Niassa	3,851,351	108,946	0.028
Sofala	2,168,358	93,573	0.043
Tete	1,135,698	28,898	0.025
Zambézia	3,074,324	88,014	0.029
Total	19,735,397	500,236	0.025

Source: Rytkönen, 2003

II.1.3 Agricultural systems

The main crops in Mozambique for smallholder agriculture can be grouped into three different categories:

- 1) basic food crops for most farm households;
- 2) food crops for diversification or with regional specialization; and
- 3) traditional cash crops.

In the first category are maize and cassava, grown by 79 percent and 63 percent of smallholder households respectively (INE and MADER, 2001). For diversification, smallholder households crop groundnuts, beans, sorghum, millet, rice, cashew, and sweet potatoes. Cash crops for smallholders include the traditional crops of cotton and sugarcane, and newer crops of tobacco, oilseeds (sunflower, sesame, soy) and spices (ginger, paprika).

For all crops throughout the country, manual cultivation systems are prevalent, with rotation and intercropping. In some areas, two crops per year are possible, with different crops, according to the season. The main cropping season is September-October through March-April, the rainy season.

With rain in May, a second crop can be planted in the dry season (or with irrigation in some areas). Most farmers cultivate several different plots; some plots may be near the homestead and others quite a distance away. In 2003, only 2.5 percent of farmers used fertilizers and 5.2 percent used insecticides (see Table 20). In relation to seed sources, 57 percent of seeds were from own production, with another 18 percent locally obtained, and only 1 percent of the population actually purchased seed. Out-grower schemes provide seeds and other inputs for some cash crops, including cotton and sesame.

Irrigated production is primarily confined to peri-urban production, with vegetables and irrigated rice in selected zones. Rice is primarily cultivated in a rain-fed lowland ecosystem, with a minimum of water control needed in some flood areas (e.g. in Zambézia Province.)

Whole families are generally involved in agriculture and children from the age of 12 will be predominantly occupied in the fields. Most families possess 2 or 3 separate *machambas*, usually located near to their homesteads.

Other livelihood strategies consist of hunting, fishing, providing local labour, commercial activities and some artesanal activities. Fishing methods used include hooks with bait, nets, woven fish traps and the use of poisons extracted from local plants (particularly used in the lakes and areas of slow-moving water). In fishing communities, the household strategy divides labour and access to natural resources according to the season. During the rainy season, greater effort is spent on fishing, whilst in the dry season more time is spent in the *machambas*.

Small animals (cane rats, shrews, etc.) are hunted and trapped by women and children, while men usually organise hunts after larger game (often involving the setting of fires and nets in the forest). Meat obtained through hunting will be sold if captured in sufficient quantities.

Pottery, basket making, carpentry and blacksmithing are important ancillary activities for some families. Women tend to practise pottery and weaving, whilst men predominate in carpentry and blacksmithing.

A further source of income for many rural families is *ganho-ganho*, a system of providing labour in the fields to other families in return for payment; this functions mostly as a form of barter trade, where payment is made predominantly in manufactured items rather than cash or local produce. Men have greater opportunities to move out to other areas to earn *ganho-ganho*; women tend to stay at home to take care of the children and to farm. However, there are women in *ganho-ganho*, mainly widows with family responsibilities. Those with family members in employment in the urban areas or in neighbouring South Africa will often receive cash remittances. This remains significant, especially in the south of the country and despite the decline in recruitment to the South African mining industry.

The production of traditional alcoholic drinks and the sale of domestic animals and medicinal plants are also important parts of a diversified portfolio of livelihood strategies. The *ellul*,

small local markets that take place on a regular basis, represent one of the most important forms of the market at local level. In the *ellul* people are able to exchange consumer products (soap, matches, sugar, etc.) for local products such as fish, salt, coconut, rice, etc.

Table 13 – Land use for food and cash crops by province (km²)

Province	Crop areas planted 2003-04			Cropping rates for	
	Food crops	Cash crops	Cultivable land	Shifting agric land	
C. Delgado	4,606	352	10%	26%	
Gaza	2,820	69	72%	1%	
Inhambane	3,300	531	43%	21%	
Manica	2,782	37	10%	24%	
Maputo	715	151	17%	0%	
Nampula	8,760	1,046	20%	21%	
Niassa	2,857	51	3%	13%	
Sofala	2,373	506	13%	20%	
Tete	3,319	46	7%	20%	
Zambézia	7,697	501	14%	16%	
Total	39,230	3,290	12%	17%	

Source: World Bank Mission estimates based on FAO and INE data, 2005.

Table 14 – Land use for grazing and mixed farming by province (km²)

Province	Total livestock (TLUs)	Grazing areas (km ²)		Mixed farming area (km ²)
		Mixed farming	Range land	
C. Delgado	62,729	825	859	5,783
Gaza	198,583	3,148	10,021	6,037
Inhambane	173,712	3,175	5,430	7,007
Manica	366,537	2,495	13,128	5,315
Maputo	60,403	1,065	1,992	1,931
Nampula	110,324	1,424	1,566	11,230
Niassa	23,208	287	354	3,195
Sofala	97,493	1,557	2,112	4,436
Tete	396,305	3,182	29,688	6,547
Zambézia	134,188	2,141	1,085	10,339
Total	1,623,482	19,299	66,235	61,820

Notes:

(1) The proportion of cattle grazed on range land is assumed to vary from 50 percent in Maputo to 80 percent in Gaza and Inhambane and 100 percent in other provinces. The proportion of goats grazed on range land is assumed to be 50 percent for all provinces. It is assumed that all other livestock is grazed on mixed farming land.

(2) The grazing requirements vary from 2 to 3.2 ha per TLU in mixed farming and from 4 to 10 ha per TLU on range land. These estimates are based on estimates of the carrying capacity of land according to rainfall and cropping patterns derived from agricultural research.

(3) The mixed farming area is the sum of the area planted to crops (from Table 13) plus the area required for grazing in mixed farming systems.

Source: World Bank Mission estimates based on FAO and INE data, 2005.

Table 15 – Area Planted to Cereals 1996 – 2000 (ha)

Cereal	1996	1997	1998	1999	2000
Maize	1,008,000	1,153,575	1,248,000	1,152,000	1,084,153
Millet	87,000	90,461	101,000	96,000	83,325
Rice, Paddy	144,000	165,274	181,000	170,000	154,226
Sorghum	437,000	452,436	480,000	461,000	435,413
Wheat	1,800	1,800	1,800	1,800	1,200
Total	1,677,800	1,863,546	2,011,800	1,880,800	1,758,317

Source: INE, MADER, TIA, 2003

The total area planted during the 2004/5 harvest was 4,123,000 ha; 2,256,000 ha of cereal crops, 761,000 ha under vegetables and 1,106,000 ha under mandioca (see Table 16).

Table 16 – Areas sown (000ha) during 2003/4 and 2004/5

Crop	2003/04	2004/05	Variation (%)
Maize	1,394	1,440	3.3
Sorghum	524	530	1.1
Millet	112	95	-15.2
Rice	184	191	3.8
Total Cereals	2,214	2,256	1.9
Beans	436	451	3.4
Groundnuts	300	310	3.3
Total legumes	736	761	3.4
Mandioca	1,071	1,106	3.3
Total	4,027	4,123	2.4

Source: Direcção de Economia, MINAG, 2006

Table 17 – Number of Farms growing Food Crops – 2003

Crop	Nº. of Farms	Farms %^a
Maize	2,586,218	80.6
Cassava	2,397,017	74.7
<i>Nhemba</i> beans	1,719,479	53.6
Groundnuts	1,481,478	46.2
Sorghum	1,112,581	34.7
Rive	840,426	26.2
Sweet potato	830,985	25.9
Boer beans	714,440	22.3
<i>Jugo</i> beans	452,025	14.1
Butter beans	344,772	10.7
Millet	186,692	5.8
Cotton	168,984	5.3
Tobacco	99,882	3.1
Sunflower	37,762	1.2

Note: a . % of farms out of total small and medium farms

(Source: INE, MADER, TIA, 2003)

Livestock numbers are low, as herds have yet to recover from the losses incurred during the civil war and the floods of 2000. The livestock census in 2003 identified the following (cattle, goat and sheep numbers are estimated to be increasing at around 8 percent per annum):

Table 18 – Animal Ownership – 2003

Animals	Numbers
Goats	4,752,735
Rabbits	4,752,735
Ducks	1,531,987
Pigs	1,344,325
Cattle	965,330
Sheep	135,110
Turkeys	60,519
Donkeys	40,954
Geese	12,450

Source: INE, MADER, TIA, 2003

Recent data indicates that global cattle ownership by the end of 2005 would reach 1.3 million head.

Table 19 – Estimated percentage of farmers with coconut and cashew trees – 2005

Province	Cashews	Coconuts
C Delgado	25.7	21.7
Gaza	70.4	28.4
Inhambane	72.6	69.2
Manica	10.7	0
Maputo	35.4	4.4
Nampula	49.7	12
Niassa	1.3	0
Sofala	35.6	14.3
Tete	1.7	0
Zambézia	30.3	26.3
Total	34.9	19.7

Source: FAO/WFP Crop and Food Supply Assessment Mission to Mozambique, 2005

Table 20 – Use of Agricultural Inputs – 2003

Products	% Farms using
Fertilisers	2,5
Pesticides	5,2
Manure	1,8
Agricultural Processing Equipment	46,4
Machinery	25,4
Animal Traction	11,2

Source: INE, MADER, TIA, 2003

II.1.4 Agriculture in the economy (percentage GDP)

The percentage of GDP generated from agricultural activities (including forestry and fisheries) in 2000 was recorded at 24.4 percent (EarthTrends, 2005). FAO estimates put agriculture's share of GDP, in 2004, at less than 20 percent. IMF estimates are slightly higher, at 23.4 percent for 2004 (see Table 21). In 1996 the contribution of agriculture was 30 percent.

Table 21 – Breakdown of GDP - % contribution

Sector	2003	2004
Agriculture	19.5	23.4
Fishing	1.4	2.1
Import rights	-0.7	0.2
Industry	27.7	27.3
Services	52.1	47
Total GDP	100%	100%

Source: IMF Country Report No. 05/311, 2005

The agricultural and agro-industry sector has the least access to formal financial institutions. Overall, only 16 percent of credit goes to agriculture – and mainly to large foreign-owned farms – while 35 percent goes to industry and 49 percent to trade and other services. However, the weight of credit to agriculture is expected to increase as a result of the new strategy of South African banks (Standard Bank and ABSA) to support medium and large commercial farmers, mainly Zimbabwean, in Manica.

According to a recent household survey (the *Inquéritos aos Agregados Familiares 2002/03*), the proportion of poor in Mozambique significantly declined from 70 percent in 1996/97 to 54 percent in 2002/03. However, this positive achievement masks significant regional variations. Incidence seems to have fallen dramatically in the centre, especially in the Tete and Sofala provinces, where poverty has fallen from above 80 percent to 60 percent and 36 percent respectively. However, the poverty rate in the Southern province of Inhambane continues to exceed 80 percent. Another recent survey carried out by the Ministry of Agriculture, which is based on income instead on expenditure, suggests a reduction of poverty by 4 percent only.

The minimum wage for agricultural workers was set at MZM 805,444.00/month in 2004 (approximately 25 Euros) and is currently under revision (Ministerial Diploma n°.75/2004 of 28th April).

II.1.5 Main agricultural produce and secondary products

Growth in agricultural production in 2005 was around 1.8 percent, despite the climatic problems observed, affecting the central and southern regions of the country on a large scale. The growth in production was due to the recorded increase in cash crops, especially cashew nut (142.7 percent), tobacco (33.9 percent) and sugar cane (19 percent). A drop in production of around 2.1 percent was recorded for food crops.

Growth was registered only in cassava (3.5 percent) and beans (4.1 percent). Overall growth was due essentially to cash crops, with cashew nut, tobacco, sugar cane and tea standing out with growth rates of 142.7 percent, 33.9 percent, 19.0 percent and 5.7 percent respectively. Among cash crops cotton crop recorded a reduction of 12.7 percent in comparison with the previous season.

Table 22 – Top 20 Agricultural Products – 2004

Rank	Commodity	Production (MT)
1	Cassava	6,149,897
2	Maize	1,248,000
3	Sugar Cane	400,000
4	Sorghum	314,000
5	Coconuts	265,000
6	Pulses	205,000
7	Rice, Paddy	200,439
8	Groundnuts in Shell	109,915
9	Vegetables Fresh	105,000
10	Bananas	90,000
11	Fruit Fresh	90,000
12	Potatoes	80,000
13	Sweet Potatoes	66,000
14	Cow Milk, Whole, Fresh	60,350
15	Cashew Nuts	58,000
16	Millet	48,000
17	Indigenous Cattle Meat	38,046
18	Indigenous Chicken Meat	37,879
19	Papayas	31,000
20	Oilseeds	30,000

Note:

All figures are FAO estimates.

Source: FAO Agriculture Country Profiles,

<http://www.fao.org/countryprofiles/index.asp?lang=en&iso3=MOZ&subj=4>, accessed April, 2006.

Table 23 – Production and growth rates (MT) – Cash crops

Crop	2003/04	2004/05	Growth (%)
Cotton	92,000	78,500	-14.7
Cashew	42,988	104,337	142.7
Sugar Cane	1,873,262	2,246,985	20
Green tea	15,127	16,000	5.8
Citrus	30,000	30,000	0
Copra	47,000	47,000	0
Tobacco	49,528	65,042	31.3
Sunflowers	6,127	7,000	14.2

Source: Direção de Economia, MINAG, 2006

During 2005, it was estimated that 1,314,953 litres of fresh milk were produced nationally (17.3 percent growth since 2004). Production of pork meat (487 tonnes, 61 percent of which was from the family sector) grew by 26 percent from 2004 levels, whereas beef production grew by only 6.8 percent (6,113 tonnes). Chicken meat production grew by 411 tonnes from 2004 levels to reach 2,721 tonnes in 2005 (an increase of 15 percent) with egg production dropping to 1,174,139 dozen eggs (a fall of 14 percent).

Table 24 – Food crop production (000MT) 2003 – 2005

Crop	2003/04	2004/05	Variation (%)
Maize	1,435	1,382	-3.7
Sorghum	331	308	-6.9
Millet	51	36	-29.4
Rice	187	174	-7.0
Total Cereals	2,004	1,900	-5.2
Beans	193	201	4.1
Groundnuts	132	132	0.0
Total legumes	325	333	2.5
Mandioca	6,413	6,635	3.5

Source: Direcção de Economia, MINAG, 2006

Artesenal fish production for 2003 is shown in Table 25 below. In 2006, the Ministry of Fisheries estimated annual artesanal production to be in the range of 80-100,000 tonnes. In 2005, the semi-industrial fleet landed 14,100 tonnes of fish product, of which shallow-water prawns was 1,400 tonnes and kapenta from Cahora Bassa 12,000 tonnes, while the industrial fleet of 85 licensed vessels landed 10,000 tonnes, of which 7,700 tonnes were shallow-water prawns (Ministry of Fisheries, 2006).

Table 25 – Artesenal Fish Production – 2003

Item	Total (MT)
Prawns	5,835
Fish	57,759
Cephalopods	389
Crab	356
Shark	429
Others	2,306
Total	67,074

Source: National Directorate of Fisheries Economics, 2005

Table 26 – Licensed forest production (2005)

Product	N.º Licences issued	Units	Licensed Volume
Round logs	824	m ³	134,886
Firewood	440	bundles	54,475
Charcoal	1,552	sacks	781,166
Poles	132	bundles	8,164
Bamboo	175	bundles	9,686

Table 27 – Licensed forest production 2002 – 2005

Product	Units	Licensed Volume						
		2002	2003	(%)	2004	(%)	2005	(%)
Firewood	bundles	63,625	60,027	-5.7	83,977	39.9	54,475	-35.1
Charcoal	sacks	1,051,970	777,433	-26.1	1,049,476	35.0	781,166	-25.6
Poles	bundles	11,918	17,766	49.1	16,048	-9.7	8,164	-49.1
Bamboo	bundles	13,727	17,237	25.6	10,717	-37.8	9,686	-9.6

II.1.6 Main export markets

Foreign export trade in agricultural products was estimated at US\$76.3 million in 2002. This had increased to over US\$100 million by 2003, with tobacco, cotton and cashew generating almost 75 percent of this value between them:

Tobacco has become Mozambique's third largest export, after aluminium and prawns, with exports valued at \$41 million in 2004. It is now more important than sugar as an export, and has also had a dramatic effect on peasant income in some areas.

2005 production in the cotton sector was estimated at 78,500 tonnes, producing 28,200 tonnes of cotton fibre with a value of approximately USD\$ 28.2 million (at an average price of USD\$ 1,000 per tonne).

An estimated volume of 104,337 tonnes of cashew were sold in 2005, an increase of 49 percent on the 2004 figures (this was the best crop from the last 10 years).

The four major sugar producers managed to obtain the best production figures of the last 30 years, producing 2,246,985 tonnes of cane.

Table 28 – Top 20 Agricultural Exports – 2003

Rank	Commodity	Quantity (MT)	Value (US\$ 000)	Unit value (US\$)
1	Tobacco Leaves	11,363	31,936	2,811
2	Cotton Lint	24,681	25,166	1,020
3	Cashew Nuts	32,659	18,399	563
4	Sugar (Centrifugal, Raw)	24,997	11,167	447
5	Sugar Refined	18,531	3,440	186
6	Sesame Seed	5,281	3,268	619
7	Copra ¹	5,092	1,292	254
8	Oil of Coconuts	2,358	1,102	467
9	Molasses	15,310	979	64
10	Tea	937	789	842
11	Cottonseed	8,809	731	83
12	Groundnuts Shelled	1,954	708	362
13	Cashew Nuts Shelled	221	671	3,036
14	Cake of Cotton Seed	4,652	461	99
15	Mutton and Lamb	100	447	4,470
16	Cake of Coconuts	9,228	435	47
17	Oranges ¹	1,100	400	364
18	Maize	3,267	324	99
19	Veg Products for Feed	410	265	646
20	Hide	10	216	21,600

Note:

1 = FAO estimate (all others are trading partner estimates)

Source: FAO Agriculture Country Profiles,

<http://www.fao.org/countryprofiles/index.asp?lang=en&iso3=MOZ&subj=4>, accessed April, 2006.

Table 29 – Fisheries Export Production Value (US\$ 000s)

Product	2001	2002	2003
Surface water prawns	83,979	72,000	61,520
Deep water prawns	10,471	7,500	7,125
Crayfish	1,160	800	1,240
Lobster	220	55	-
Crab	306	120	243
Fish	2,163	1,375	2,688
Kapenta	206	11,400	13,174
Squid/octopus	205	150	328
By-catch	10	725	804
Total	98,720	94,125	87,121

Source: National Directorate of Fisheries Economics and FAO Fisheries Country Profile

Table 30 – Major Export Destinations for Fish Products (2001)

Continent	Countries	Exported (tonne)
AFRICA	Democratic Republic of Congo	206
	Malawi	84
	Republic of South Africa	1,782
	Zambia	235
	Zimbabwe	1,118
	<u>Sub Total</u>	<u>3,425</u>
ASIA	Hong-Kong	13
	Japan	1,669
	<u>Sub Total</u>	<u>1,682</u>
EUROPE	Italy	242
	Portugal	3,658
	Spain	4,737
	United Kingdom	1
	<u>Sub Total</u>	<u>8,638</u>
Total		13,745

Source: National Directorate of Fisheries Economics (2005) and FAO Fisheries Country Profile, <http://www.fao.org/countryprofiles/index.asp?lang=en&iso3=MOZ&subj=4>, accessed April, 2006.

Table 31 – Timber Exports from Mozambique by Destination 1996-2000 (US\$ 000, cif)

Country	1996	1997	1998	1999	2000
Hong Kong	3,114	9,899	5,733	6,951	16,172
China	0	29	158	3,069	8,424
Germany	1,035	101	493	1,262	1,509
South Africa	541	787	952	868	665
Portugal	248	202	146	607	876
Italy	250	349	310	447	667
France	353	547	13	5	90
Spain	0	208	142	26	339
India	673	24	0	5	0
Japan	44	0	127	39	295
Belgium	86	14	0	67	201
Czech Rep.	0	0	0	118	118
Korea Rep.	46	96	43	16	0
Thailand	84	91	0	0	0
Netherlands	0	0	28	59	34
USA	73	0	0	0	0
Total	6,547	12,347	8,145	13,539	29,390

Source: ITC/UN 2002

Table 32 – Timber Exports from Mozambique by Group 1996-2000 (US\$000, cif)

Product	1996	1997	1998	1999	2000
Round wood (logs)	5,232	10,213	6,790	10,421	24,881
Sawn wood	1,227	2,051	1,244	2,946	4,053
Parquet + Panel	88	83	111	172	456
Total	6,547	12,347	8,145	13,539	29,390

Source: ITC/UN 2002

II.1.7 Trade agreements that include agriculture

Mozambique is a member of the Southern African Development Community (SADC). The trade protocol under this umbrella, which commits member countries to comprehensive trade liberalization, took effect in 2000, although negotiations have continued since then on some issues. Moreover, some sectors have been singled out for special treatment, such as textiles and apparel, sugar and motor vehicles. The protocol stipulates that the SADC countries will enter into a free trade arrangement. This will be achieved in stages, but it is expected that by 2008 (the protocol's target date for elimination of trade barriers) duties on 85 percent of all goods traded in SADC will be eliminated.

Mozambique receives a special trade preference from the EU under the current Everything But Arms initiative (via Regulation EC 416/2001), granting duty-free access to imports of all products from Least Developed Countries (LDCs) without any quantitative restrictions, except to arms and munitions. Only imports of fresh bananas, rice and sugar are not fully liberalised immediately. Duties on those products will be gradually reduced until duty free access will be granted for bananas (already) in January 2006, for sugar in July 2009 and for rice in September 2009. In the meantime, there will be duty free tariff quotas for rice and sugar.

Formal negotiation of European Partnership Agreements (EPAs) at the level of all African, Caribbean and Pacific (ACP) countries started in September 2002. However, the EU's insistence that the 79 ACP countries should divide into smaller blocs has proved particularly divisive in Southern Africa, largely due to the tangle of existing regional integration initiatives. SADC, for example, has been split by the need to form such regional groupings.

SADC members Zambia, Malawi, Zimbabwe, Mauritius, DRC and the Seychelles are negotiating alongside Kenya, Ethiopia, Burundi, Djibouti, Comoros, Sudan, Eritrea, Madagascar, Rwanda and Uganda, as the 'Eastern and Southern Africa' grouping (ESA). The seven remaining SADC countries will also negotiate an EPA. This group is made up of four countries that are tied to South Africa through the Southern African Customs Union (SACU) – Botswana, Lesotho, Namibia and Swaziland, and three other SADC members: Mozambique, Angola and Tanzania (ACTSA, 2003). These latter SADC group members are all LDCs and have duty free access to the EU under the Everything But Arms initiative. As a result, they have little to gain, but plenty to lose if EPAs involve 'reciprocity'. They believe that the EU need not and should not impose reciprocity. Substantive negotiations towards an EU-SADC EPA are due to start in January 2005 and end by June 2007 (ACTSA, 2004).

Mozambique has entered into bilateral trade agreements with Vietnam in 2003 (granting most-favoured-nation status regarding customs arrangements), with the USA in 2005 (a Trade and Investment Framework Agreement), and with Zimbabwe.

The Fisheries Agreement between the European Community and Mozambique entered into force on January 1, 2004. The agreement¹⁶, which runs for three years, gives access to European fishing vessels to Mozambican waters. The target species are deep-water shrimp (gamba up to 1,000 tonnes of catches a year) and its by-catch (535 tonnes) and tuna and related species (up to 5,040 tonnes a year). The annual financial compensation for tuna and related species is €600,000.

The annual financial compensation for deep-water shrimp fishing and by-catches in Mozambican waters is fixed at €3,490,000. A maximum of 10 freezer trawlers are allowed to fish annually (with a maximum of 100 tonne catches per vessel) after payment of an advance fishing licence fee fixed at €600 per tonne of deep-water shrimp caught. The Agreement places particular emphasis on economic, financial, technical and scientific cooperation in the fisheries sector, aiming at the conservation and sustainable exploitation of fisheries resources and the development of the fisheries sector in Mozambique.

II.1.8 Sectoral policy related to agriculture, fisheries and forests

Policy Declarations

Agriculture – PROAGRI

A new Agricultural Strategy was approved for Mozambique in 1995. From 1993 a new sector wide approach was developed which resulted in the Agricultural Development Programme (PROAGRI), a sector support programme with a first phase running from 1998-2003.

¹⁶ The full Agreement establishes principles, rules and procedures which are to govern: (a) economic, financial, technical and scientific cooperation in the fisheries sector, with "a view to ensuring the conservation and sustainable exploitation of fisheries resources, as well as developing the Mozambican fisheries sector"; (b) the access of Community fishing vessels to Mozambican waters; and (c) economic activities in the fisheries sector and in related activities. The fishing activities carried on by EU fishing vessels in Mozambican waters is subject to a licence scheme (art. 7). The Protocol to the Agreement establishes the fishing opportunities and related financial compensation to be paid by the EU.

PROAGRI is based on eight basic principles agreed between government and donors, including poverty reduction, decentralization, attention to gender, environmental and social sustainability and a market orientated policy framework.

There are four key strategic objectives of PROAGRI that provide for poverty reduction:

- 1) Raise the productive capacity and productivity of agriculture, forestry and animal husbandry in the family sector and the private sector using labour-intensive technologies and sustainable management of natural resources;
- 2) Guarantee the rights of access to land and reduce the bureaucracy associated with land registration;
- 3) Promote the marketing of agricultural and livestock products, and facilitate the marketing of surpluses and access to markets (for factors of production as well as credit);
- 4) Reduce the vulnerability of households and chronic food insecurity.

For the 2002 World Food Summit, the Mozambican government summarized a set of priorities for agricultural growth and rural development as follows: “the main strategy of PROAGRI and the policies that support the program is the development of agrarian activity based on the family sector. It is intended to promote an agrarian sector, which responds to the evolution of the market and to use resources in an efficient and sustainable way. Based on this PROAGRI will create the institutional capacity to:

- 1) Continue the development of market reforms that will articulate with the new inter-sectoral strategies;
- 2) Deregulate the agriculture sector and reduce the direct involvement of the state in the production, price setting, processing and commercialisation of agricultural products;
- 3) Introduce reforms on land utilization and sustainable improvements for the use of natural resources;
- 4) Diversify and expand the family agricultural sector, reorientation food production, commercial crops production, extensive cattle and wildlife production and reforestation;
- 5) Reorient the agricultural production support services in order to respond to the comparative advantages of each agro ecological region in the provision of services; and,
- 6) Develop and expand small-scale irrigation.

The Agricultural Commercialization Strategy, approved by the Council of Ministers in 2001, indicates the following roles for the government:

- 1) Create a favourable environment for domestic and foreign investment in agricultural markets;
- 2) Facilitate investments through improved infrastructure and research and information, particularly for non-traditional exports; and
- 3) Promote and support the participation of family sector agriculture in markets, to gain more value added (Council of Ministers, 2001, p.3).

Agriculture & Natural Resources – The Poverty Reduction Strategy & Plan (PARPA)

The PARPA states that agriculture and rural development play a key role in any strategy for poverty reduction and economic growth (para 155). It is also clear (paras 144, 157) that success with agriculture and rural development will depend on factors other than “agricultural programmes as such” (due to the influence of factors such as infrastructure, telecommunications, markets, financial services, education and health and nutrition, on agricultural livelihoods in rural areas). The PARPA refers to PROAGRI as the means which, “in combination with other initiatives” (para 158), Mozambique’s need for agricultural development will be addressed.

The implication is that ‘agricultural development’ is in fact cross-sectoral in nature, and that both appropriate action in a number of sectors and cross-sectoral coordination is required in order to address the constraints to agricultural based livelihoods.

Forest Policy

The development of the existing policy framework and a corresponding sector investment programme for the Forestry and Wildlife sector in Mozambique began in 1991 with the drawing up of a provisional programme under a UNDP/FAO team. This was apparently the first attempt at a ‘programme approach’ within the agriculture sector (Cuco, 2001). A ‘Forestry Pre-Programme’, based on the 1991 design phase, began in 1993 for a period of 18 months with finance provided from the UNDP.

In 1995, a ‘National Programme of Forestry and Wildlife (1995-2000)’ was prepared by the DNFFB, followed in 1996 by the development of an ‘Investment Programme for the Forest and Wildlife Sector’, drawn up with technical assistance from FAO/UNDP. Also in 1996, a ‘Forestry and Wildlife Policy and Strategy’ was developed.

The investment programme was subsequently revised in 1997, following a Joint Donor Pre Appraisal Mission and integrated into the broader PROAGRI programme.

The Forestry and Wildlife Policy and Strategy document was adopted by the Council of Ministers in 1997¹⁷. Prior to this, no new forestry laws had been promulgated since 1965 and no laws relating to wildlife since 1978. This was followed by the passing of the new Forestry and Wildlife Law in 1999¹⁸ (LFFB).

Article 3 of the LFFB contains a list of principles upon which the law and its regulation are to be based. Amongst these are the following:

“of equilibrium: the policies of social and economic development and the preservation and conservation of biodiversity must involve local communities, the private sector and civil

¹⁷ Resolution 10/97 of 7th April

¹⁸ Forestry and Wildlife Law [*Lei de Florestas e Fauna Bravia*] Law 10/99 of 7th July [LFFB]

society in general, with the object of advancing a sustainable development in the present and for future generations;”¹⁹

“of harmony between local communities and local organs of the State: the promotion of conservation, management and utilization of forestry and wildlife resources without prejudice to customary practises and in conformity with the principles of conservation and of the sustainable utilization of forest and wildlife resources, within the framework of decentralization;”²⁰

“of private sector participation: involvement of the private sector in the management, conservation and exploitation of forest and wildlife resources, with a view to adding value and imprinting greater development for local communities;”²¹

Fisheries Policy

In the Fisheries Law of 1990 the promotion of small-scale fishery is stressed, given its social and economic contribution. The law emphasizes the creation of funds to support the development of small-scale fisheries, largely by providing financial support. The law also emphasizes the establishment of specific policies for the management and development of both freshwater and marine aquaculture. The same is applicable for recreational and sport fishery, for which specific legislation has been drawn up.

The Fisheries Policy is based on the following objectives:

- 2) Improve the internal supply of fish to cover food deficits in the country, through the increase in the volume of the fish catch and the reduction in the post catch losses;
- 3) Increase income in foreign currency generated by the sector, through the increase in the volume of fish production for export, increase in the added value of the exported products through processing in-country and increasing the value of the most important export – prawns- through the transformation of the existing fleet;
- 4) Improve the living conditions of the fishing communities, through increasing the employment levels in the fisheries sector and increasing income of the small-scale fishermen.

In order to achieve these objectives the Fisheries Policy is based on the following principles:

- 1) All fishery resources are the property of the state. The state is responsible for the gaining maximum benefits from the use of the resources;
- 2) All ports and docks, and associated infrastructures are the responsibility of the state. The state is responsible for the development in time and space of these infrastructures

¹⁹ “do equilíbrio: as políticas de desenvolvimento económico e social e de preservação da biodiversidade, devem envolver as comunidades locais, o sector privado e a sociedade civil em geral, com o objectivo de se alcançar um desenvolvimento sustentável no presente e para as gerações vindouras;” Article 3(b) [LFFB]

²⁰ “da harmonia com as comunidades locais os órgãos locais do Estado: promoção da conservação, gestão e utilização dos recursos florestais e faunísticos sem prejuízo das práticas costumeiras e em conformidade com os princípios da conservação e da utilização dos recursos florestais e faunísticos, no quadro da descentralização;” Article 3(e) [LFFB]

²¹ “da participação do sector privado: envolvimento do sector privado na gestão, conservação e exploração dos recursos florestais e faunísticos, visando atribuir maior valor acrescentado, e imprimir maior desenvolvimento para as comunidades locais;” Article 3(e) [LFFB]

in line with the needs of the productive sector, in ways that which ensure the sustainability of the investments in the long-term;

- 3) The need to improve the service capacity in the area of construction, maintenance and repair of ships;
- 4) The need to improve the productive and commercial capacity for seafood;
- 5) Create the necessary structures for the development of activities in the fishery sector;
- 6) Develop the national private sector;

E Develop the institutional capacity and the human resources in the sector.

The law defines the necessary procedures and conditions for qualifying and applying for a fishing licence, and the applicable terms, such as payment of fees or taxes; validity; the number, type and characteristics of the gear allowed; species; and fishing areas applicable. The law also defines management measures for the fisheries resources, principally the minimum lengths and or weights of species. It also defines closed seasons; areas of limited or unauthorized areas; specifications for the gear; maximum allowed catch per boat or per fisherman in a certain zone; unauthorized fishing techniques; and limits on fishing effort.

Relevant Legislation

Land & Agriculture

Decree No. 8/89 of 18th May (Model for the Statute of Agricultural Cooperative Unions) [Boletim da República No. 20 – Supp., Series I – 18 May 1989, pp. 256(6 and 7)]

This Decree approves the Model for the Statute of Agricultural Cooperative Unions whose aim is the promotion of cooperatives in the agricultural sector.

Law 19/97 of 1st October (Land Law) [Boletim da República No. 40 – 3rd Supp., Series I – 7th October 1997].

Decree 66/98 of 8th December (Rural Land Law Regulations) [Boletim da República No. 48 – Supp., Series I – 8th December 1998].

Decree 77/99 of 15th October (Establishment of Land Title Use Fees for Certain Activities) [Boletim da República No. 41 – 2nd Supp., Series I – 15th October 1999].

Ministry of Agriculture and Fishing, Ministerial Diploma no. 29-A/2000 signed 7th December 1999 (Land Law Regulations – Technical Annex for the Demarcation of land use and benefit areas) [Boletim da República No. 11 – Series I – 17th March 2000]

Decree No. 176/2001 of 28th November (ruling on tobacco production and commercialization) [Boletim da República No. 48 – Series I – 28th November 2001, pp. 261-265]

This Decree, composed of 34 articles, approves the Regulations on production and commercialisation of tobacco. In particular, it rules on production plans, import and export requirements and control measures. Moreover, the Decree regulates the classification and registration procedures for tobacco producers.

Decree No. 184/2001 of 19th December (on seeds production, trade, quality control and certification) [Boletim da República No. 51 – Series I – 19th December 2001 pp. 275-290]

This Decree, composed of two articles and four Annexes, approves the Regulations on seed production, trade, quality control and certification. In particular, the annexed Regulations define new seed variety registration procedures, as well as import and export requirements and provides a list of the dangerous weeds and sets penalties and offences.

Decree No. 219/2002 of 5th December (animal health Regulations) [Boletim da República No. 49 – Series I – 5th December 2002, pp. 370(12)-370(31)]

This Decree, composed of 3 articles and one Annex, approves the Regulation on animal Health. The Regulation aims at establishing the provisions necessary to epidemiological monitoring and the control of animal diseases in Mozambique. In particular, the Regulation deals with animal transit, animal derived products, health protection measures, and provisions addressed to wildlife. Finally, the Regulation defines inspection procedures and penalties for non compliance.

Decree No. 218/2002 of 5th December (Regulations for livestock identification and registry) [Boletim da República No. 49 – Series I – 5th December 2002, pp. 370(3)-370(11)]

This Decree, composed of two articles and one Annex, approves the Regulation for livestock identification and registry. In particular, the regulation rules on the marking and registry procedures, and defines the competent authorities.

Forestry & Wildlife

Resolution 10/97 of 7th April (Forestry and Wildlife Policy) [Boletim da República No. 14 – Supp., Series I – 7th April 1997]

Law 10/99 of 7th July (Forestry and Wildlife Law) [Boletim da República No. 27 – 4th Supp., Series I – 12th July 1999]

Decree No. 11/03 of 25th March 2003 (amending Decree No. 12/2002 on Forestry and Wildlife Law) [Boletim da República No. 13 – Series I – 26th March, 2003, pp. 78 and 79.

(This Decree provides a new version of articles 20, 21, and 29 of Decree No. 12/2002 on the Forestry and Wild Fauna Act. In particular, it amends those provisions dealing with licensing procedures and forestry exploitation concessions).

Decree 12/2002 of 6th June 2002 (Regulations of the Forestry and Wildlife Law) [Boletim da República No. 22 – Series I – 6th June, 2002, pp.194(3)-194(27)]

Ministerial Diploma No. 52-C/2003 of 20th May, 2003 (on forest species used for producing timber) [Boletim da República No. 20 – Series I – 20th May 2003, pp. 160(54) and 160 (55)]

Fisheries

Decree-Law 31/76 of 19th August 1976; and Decree-Law 16/91 of 3rd August 1991 (Regulation of the Law of Seas)

These Decrees define rights over marine resources adjacent to the Coastal zone of the Republic of Mozambique and address the Law of Seas as described in an international vision relating to the sector.

Decree No. 22/88 of 28th December 1988, (creation of the Fund for Fisheries Improvement), Boletim da República No. 52 – Supp., Series I – 28th December 1988, pp. 450(10-13)]

This Presidential Decree creates the Fund for Fisheries Improvement (FFP) and approves its Statutes. It consists of 5 chapters specifying duties and competencies of the aforementioned Fund, created in order to improve the fisheries sector within waters under Mozambican jurisdiction (in particular artisanal fishing).

Law No. 3/90 of 26th September (approving the Fisheries Act) [Boletim da República No. 39, 26 September 1990, pp. 5-14.]

This Act represents the framework text for fisheries. The 6 chapters and 73 sections aim to orient the activities of the fisheries administration and operators. The Act applies to all vessels operating in waters under Mozambican jurisdiction and all Mozambican vessels engaged on the high seas or in the national waters of third party States.

Decision of 20th June 1999 (providing for an industrial trawl fishing restriction beyond 3 nautical miles from the coastline) [Boletim da República No. 26 – Series I – 30th June 1999, pp. 122 and 123]

This Decision provides for an industrial trawl fishing restriction beyond 3 nautical miles from the coastline and in water depth exceeding 10 metres. Trawl fishing activity within the Districts of Moma, Angoche and Mogincual is allowed only when using a minimum cod-end mesh of 12 millimetres. This renewable restriction shall be applied for a period of 1 year.

Order No. 40/2001 of 28th February (on shrimps fishing regime in shallow waters) [Boletim da República No. 9 – Series I – 28th February 2001, pp. 45 and 46]

This Order, composed of 10 articles, establishes the legal regime applicable to shrimps fisheries with the closed technique in shallow waters. The Order rules artisanal fishing gears and monitoring measures.

Decree No. 17/2001 of 12th June (Fisheries products inspection and quality control) [Boletim da República No. 23- Series I – 12th June 2001, pp. 124(1)-124(71)]

This Decree, composed of 3 articles and one Annex, approves the Regulation on Fish products inspection and quality control. In particular, the regulation defines fish inspection procedures, health requirements and related licensing of fishing infrastructures and vessels, fish products labelling and packaging requirements. Moreover, the regulation provides 22 forms of certification models and templates.

Decree No. 35/2001 of 13th November (General Aquaculture Regulations) [Boletim da República No. 45 – 2nd Supp., Series I – 13th November 2001, pp. 246(1-16)] – This Decree amends Legislative Decree No. 1977 of 10th May 1960 as modified by Legislative Decree No. 2752 of 27th May 1967

This Decree is divided into: General Provisions (I), Activity Management and Planning (II), Authorization and Licensing (III), Aquaculture Product Conditions and Natural Resource and Environmental Protection (IV), Taxes, Inspection and Sanctions (V) and 5 Annexes including application forms for aquaculture licensing and related penalties.

Resolution No. 39/2002 ratifying the Protocol on Community Fisheries for Southern African Development Community (SADC) of 30th April 2002 – [Boletim da República No.17 – Series I – 30th April 2002, pp.170(3)-170(11)] – Repeals: Protocol on Shared Watercourse Systems in the Southern African Development Community (SADC) Region of 28th August 1995

This Protocol aims at conservation and sustainable use of living aquatic resources and aquatic ecosystems that are of interest to the members of SADC that are a Party to this Protocol. In particular, the protocol regulates on shared resources and artisanal fishing, small scale as well as commercial fisheries

Fisheries Agreement between the European Community and the Republic of Mozambique. Date of text: 2003. [Official Journal L 345, 31 December 2003, pp. 45-63] – Implemented by Council Regulation (EC) No. 2329/2003 on the conclusion of the Fisheries Agreement between the European Community and the Republic of Mozambique. – 22nd December 2003

Decree No. 43/2003 of 10th December (Marine Fisheries' Regulations – REPMAR) [Boletim da República No. 50 – Series I – 10th December 2003, pp. 550-583]

This Decree, composed of 6 articles and IX Annex, approves the General Regulations on Marine Fisheries (REPMAR). The Regulations, composed of IX Chapters, define marine fisheries' territorial application, regulates fishing activities, their general management, total allowable catch, fishing quotas and related authorization releases, participatory fishery management procedures, and fishing gears/methods. Moreover, the Regulations define the functions, structure and competences of the Fishery Management Commission. In addition, they provide a classification of fishing vessels and fishing types (traditional, semi-industrial and industrial). Furthermore, they rule on fishing licenses and fish resources' conservation. Finally, the regulations define monitoring and inspection procedures.

Rural Community Representation

Decree 15/2000 of 20th June (Local Community- Forms of Participation in Public Administration) [Boletim da República No. 24 – Supp., Series I – 20th June 2000]

Ministry of State Administration Diploma 107-A/2000 of 25th August (Regulations of Decree 15/2000 – Local Community- Forms of Participation in Public Administration) [Boletim da República No. 34 – Supp., Series I – 25th August 2000]

Environment

Law 20/97 of 1st October (Environment Law) [Boletim da República No. 40 – 3rd Supp., Series I – 7th October 1997]

Decree 76/98 of 29th December (Environment Impact Assessment Regulations) [Boletim da República No. 51 – 3rd Supp., Series I – 29th December 1998]

Institutional

Presidential Decree No. 36/90 of 27th December (creation of the Rural Development Institute – INDER) [Boletim da República No. 52 – 2nd Supp., Series I – 27th December 1990, pp. 308(6 and 7)]

This Presidential Decree creates the Rural Development Institution (INDER) with the objective of promoting and controlling the rural sector in Mozambique. It consists of 7 articles establishing composition, duties and competencies of the Institution, under the Council of Ministers.

Ministerial Decision No. 62/90 of 11th July (creation of the School of Fisheries) [Boletim da República No. 28 – Series I – 11th July 1990, pp. 170-185]

This Decision creates and approves the Statutes of the School of Fisheries. It consists of 13 articles specifying the programme to be carried out by the School of Fisheries, whose main objectives are: technical training of professional fishermen, navigation and improvement of the expertise on this sector

Decree 6/96 of 3rd March (Creation of Inter-Ministerial Commission for Revision of Land Legislation) [Boletim da República No. 9 – 3rd Supp., Series I – 5th March 1996]. Amended by Decree 2/2000 of 29th February.

Decree No. 62/98 of 24th November (approving the Statutes of the National Institution for Artisanal Fisheries Development – IDPPE) [Boletim da República No. 46 – 2nd Supp., Series I – 24th November 1998, pp. 184(3-5)]

This Decree approves the Statutes of the National Institution for Artisanal Fisheries Development (IDPPE). It consists of 15 articles specifying duties and competencies of the aforementioned Institution created in order to improve artisanal fishing within national waters by the management and enhancement of artisanal fishing production.

Decree No. 63/98 of 24th November (creating the National Institution for Fisheries Research – IIP) [Boletim da República No. 46 – 2nd Supp., Series I – 24th November 1998, pp. 184(5-7)]

This Decree creates the National Institution for Fisheries Research (IIP). It consists of 15 articles specifying duties and competencies of the Institution, under the Ministry of Agriculture and Fisheries, created in order to carry out research on the fisheries sector within national waters.

Ministerial Order No. 63/98 of 10th June (approving the composition of the Fisheries State Secretariat) [Boletim da República No. 24 – Series I – 10th June 1992, pp. 118 and 119]

This Ministerial Order repeals Annex 1 of Ministerial Order No. 126/87 of 11 November 1987. The Order approves the composition of the Fisheries State Secretariat. It consists of 3 articles and 1 table dealing with the composition of the institute.

Ministerial Decision No. 100/99 of 8th September (approving the composition of the National Institution for Artisanal Fisheries Development – IDPPE) [Boletim da República No. 36 – 2nd Supp., Series I – 8th September 1999, pp. 160(93-95)]

This Ministerial Decision approves the composition of the National Institution for Artisanal Fisheries Development (IDPPE), including private and public personnel. It consists of 4 articles specifying composition and duties of the Institution.

Presidential Decree No. 10/2000 of 23rd May (establishes the powers and authorities of the Ministry of Agriculture and Rural Development) [Boletim da República No. 20 – Supp., Series I – 23rd May 2000]

Ministerial Diploma No. 161/2000 of 15th November (establishes the internal structure, powers and authorities of directorates and other divisions within the Ministry of Agriculture and Rural Development) [Boletim da República No. 46, Series I – 15th November 2000]

- Ministerial Diploma No. 17/2001 of 7 February, 2001 (transfers certain powers over wildlife reserves and areas of tourist interest to the Ministry of Tourism [Boletim da República No. 6 – Series I – 7th February 2001] – Minister of Agriculture and Rural Development, Minister of Tourism and Minister of Planning and Finance)
- Decree No. 18/2001 of 7th February (instituting the Ministry of Fisheries) [Boletim da Republica, No. 6 – Series I – 7th February 2001 pp. 27 and 28]
This decree, composed of two articles and one Annex, approves the structure and related competence of the Ministry for Fisheries
- Order No. 47/2001 of 7th March (approving the Statute of the Ministry of Fisheries) [Boletim da República No. 10 – Series I – 7th March 2001, pp. 48(9)-48(19)]
This Order, composed of 2 articles and one Annex, approves the Statutes of the Ministry of Fisheries. The Annex contains the Statutes regulating the Ministry’s structure, competences, and internal organization.
- Decree No. 47/2002 of 10th March (on the Fishery Management Commission – CAP) [Boletim da República No. 15 – Series I – 10th April 2002, pp. 149-151]
This Decree, composed of 3 articles and one Annex, approves the Statutes of the Fishery Management Commission (CAP), with the special function of supporting the Ministry of Fisheries in matters related to conservation and management of fishing resources. The annexed Regulations rule on the Commission’s competences, composition, agenda of meetings, and functions.
- Resolution No. 3/2002 of 13th March (approving the model Statute for the Provincial Fishery Directorates) [Boletim da República No. 15 – Series I – 10th April 2002, pp.154-156]
This Resolution approves the model Statutes of the Provincial Fishery Directorates, the local bodies of the Ministry of Fisheries, responsible for the administration and management of fisheries, research and inspection of fish, as well as of derived products. The model Statutes, annexed to the Regulations, is composed of 4 Chapters and 14 articles. It rules on the functions, structure, and management procedures of the Directorates.
- Ministerial Diploma No. 60/2003 of 4th July (approving the Regulations for the Fund for Fisheries Promotion – FFP) [Boletim da República No. 23 – Series I – 4th June 2003, pp. 231-239]
This Decree, composed of one article and one Annex, approves the Regulation on the Fund for Fisheries Promotion (FFP). The annexed Regulation, composed of 26 articles structured in VI Chapters, defines the FFP objectives, mission, functions as well as the organizational structure and management procedures.

General & Rural Development

- Constituição da República de Moçambique, 2nd November, 1990. [BR No 44]
- Assembly of the Republic Resolution No. 4/2000 of 22nd March (Government’s Five Year Plan for the Period 2000-2004) [Boletim da República No. 12 – Supp., Series I – 22nd March 2000]
- Council of Ministers Resolution 3/98 of 1 April (General Guidelines for Rural Development and Inter-Sectoral Co-ordination Mechanisms) Boletim da República No. 7- 2^o Supp., Series I – 24th February 1998].

II.2 Socio-economic profile

Table 33 – Economic Indicators (2000 – 2004)

	2000	2001	2002	2003	2004 ^p	2005 ^a
GDP per capita in US\$	207	187	195	233	276	230
Real GDP growth (%)	1.5	13.0	7.7	7.8	7.2	
Agricultural GDP growth rate (%)	-6.7	13.0	8.0	7.0	8.9	
Consumer price inflation (%)	11.4	21.9	9.1	13.8	12.9	
Exchange rate <i>meticaís</i> /US\$ (period average)	15,227	20,704	23,678	23,782	22,581	
Trade Deficit in US\$million ^b	682	271	536	348	165	

Notes:

p = projected by EIU

a = actual according to UNDP Human Development Report

b = trade in goods, fob.

Source: Economist Intelligence Unit; Government and International Agency staff estimates, UNDP, 2005.

II.2.1 Demographics

Table 34 – Total enumerated population, sex ratio and total fertility rate in 1997, and estimated total population and population density for 2000

Region/Year	Total	Male	Female	Sex Ratio	TFR 1977	Total	pers/km ² 2000 est.
National	15,278,334	7,320,948	7,957,386	92	5.9	17,242,240	21.6
Niassa	756,287	370,155	386,132	95.9	6.8	870,544	6.7
C. Delgado	1,287,814	623,332	664,482	93.8	6.7	1,465,537	17.7
Nampula	2,975,747	1,479,925	1,495,822	98.9	6.3	3,265,854	40
Zambézia	2,891,809	1,402,249	1,489,560	94.1	7	3,316,703	31.6
Tete	1,144,604	548,930	595,674	92.2	8.3	1,319,904	13.1
Manica	974,208	465,942	508,266	91.7	7	1,137,448	18.4
Sofala	1,289,390	628,747	660,643	95.2	6.6	1,453,928	21.4
Inhambane	1,123,079	491,242	631,837	77.7	5.5	1,256,139	18.3
Gaza	1,062,380	456,909	605,471	75.5	5.9	1,203,294	15.9
Maputo	806,179	379,789	426,390	89.1	5	933,951	35.8
Maputo City	966,837	473,728	493,109	96.1	4.3	1,018,038	3396.5

Mozambique: Projected population by residence, 5-year age groups and sex in 1997

Source: INE. 1999. Censo 1997, CD-ROM.

Figure 2 - Population Pyramid 1997

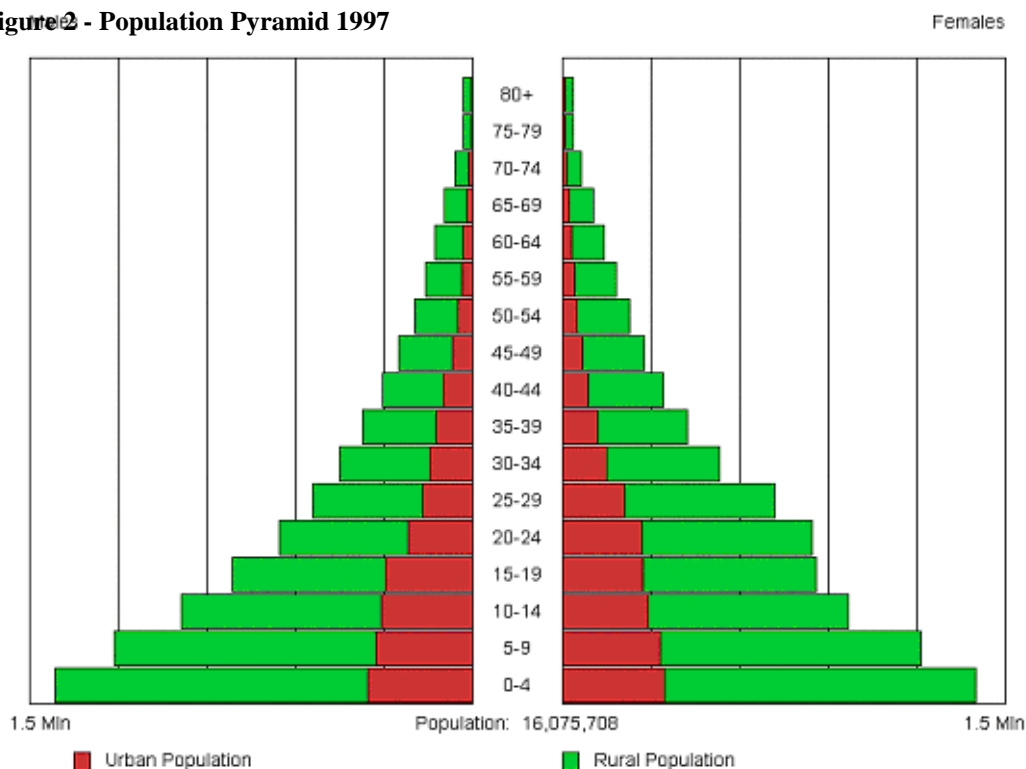


Table 35 – Percentage of population aged 5 that speaks Portuguese, by gender and residence – 1997

Residence	Total	Male	Female
Total	39.6	50.4	29.7
Urban	72.4	80.7	64.2
Rural	25.4	36.6	15.6

Source : IIASA Population project (<http://www.iiasa.ac.at/Research/POP/>)

The population consists mainly of indigenous tribal groups (99 percent): Shangaan, Chokwe, Manyika, Sena, Makwa and others. Only 0.06 percent is European, 0.2 percent Euro-African and 0.08 percent Indians. The official language is Portuguese but few people (24.3 percent) can speak and write it. The majority of the population speaks one of the 13 national languages (FAO, 2001).

Note (see Table 35) that the highest proportion of knowledge of Portuguese is in the age group 10-39. This declines with increasing age, is higher in urban than in rural areas, and is higher for males than for females throughout all age groups. Looking at the illiteracy rate, the heritage of colonial racial segregation is clearly visible. For the total country the rates differ heavily between age groups. For the population aged 15-19 the rate is 50 percent and for the population 60 and over the rate is 83 percent. The rates are higher in rural than in urban areas (note only rural figures given in Table 36).

Table 36 – State of illiteracy of rural population 5 year and over, by age and gender

Rural Population	Write and Read			Read Only			Neither			Unknown		
	TOTAL	MALE	FEMALE	TOTAL	MALE	FEMALE	TOTAL	MALE	FEMALE	TOTAL	MALE	FEMALE
	1,950,923	1,351,862	599,061	151,676	91,311	60,365	6,532,261	2,601,101	3,931,160	144,261	67,927	76,334
5-9	95,185	54,294	40,891	32,809	18,388	14,421	1,437,034	713,419	723,615	43,727	21,828	21,899
10-14	365,021	223,316	141,705	45,365	26,842	18,523	800,080	388,124	411,956	14,288	7,033	7,255
15 – 19	354,076	221,249	132,827	17,733	10,556	7,177	672,966	246,811	426,155	19,111	8,638	10,473
20 – 24	282,904	178,078	104,826	12,721	7,073	5,648	684,896	222,637	462,259	23,135	12,056	11,079
25 – 29	227,156	157,289	69,867	10,299	5,834	4,465	569,970	180,532	389,438	10,308	4,423	5,885
30 – 34	185,317	139,134	46,183	6,945	4,130	2,815	404,922	126,387	278,535	6,407	2,592	3,815
35 – 39	143,537	118,647	24,890	5,953	3,805	2,148	399,910	122,714	277,196	5,854	2,300	3,554
40 – 44	84,476	71,855	12,621	4,388	3,059	1,329	306,445	102,746	203,699	4,555	1,808	2,747
45 – 49	73,109	63,669	9,440	4,336	3,123	1,213	317,682	116,084	201,598	4,333	1,779	2,554
50 – 54	43,829	38,066	5,763	3,042	2,230	812	245,125	89,097	156,028	3,458	1,411	2,047
55 – 59	36,281	32,219	4,062	2,771	2,111	660	217,963	87,526	130,437	2,784	1,188	1,596
60 – 64	23,736	21,133	2,603	1,858	1,409	449	154,560	63,202	91,358	2,105	928	1,177
65 – 69	18,575	16,854	1,721	1,640	1,289	351	143,297	61,232	82,065	1,715	773	942
70 – 74	7,581	6,850	731	705	554	151	67,426	30,012	37,414	912	449	463
75 – 79	6,145	5,613	532	654	538	116	60,155	27,929	32,226	763	336	427
80 and +	3,995	3,596	399	457	370	87	49,830	22,649	27,181	806	385	421

Source: INE. 1999. CD-ROM: Censo 97. II Recenseamento Geral da População e Habitação. Resultados Definitivos. Maputo: INE, Table 19.

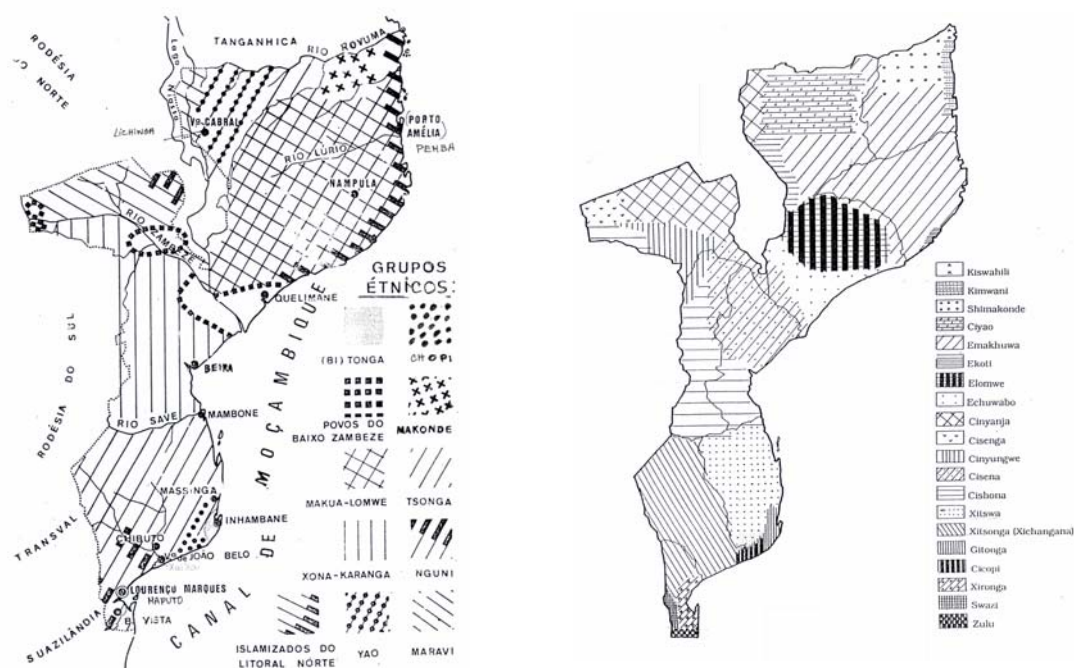
UNDP figures show that adult literacy rates have improved considerably, from a general level of 33.5 percent in 1990 to 46.5 percent in 2003. Youth literacy rates have improved from 48.8 percent to 62.8 percent in the same period.

Table 37 – Native languages, in percent of population aged 5 and over (around 12,536,000 people), 1997

Language	% speakers
Portuguese	6.50%
Emakhuwa	26.30%
Xichangana	11.40%
Elomwe	7.90%
Cisena	7.00%
Echuwabo	6.30%
Other Mozambican	33.00%
Other Foreign	0.40%
None	0.10%
Not Known	1.30%

Source : IIASA Population project (<http://www.iiasa.ac.at/Research/POP/>), accessed April 2006

Figure 3 - Ethnic and Linguistic Maps of Mozambique



Source: CIDAC, Lisboa, undated

II.2.3 Access to services

Health

In the health sector there has been some progress in rehabilitating infrastructure, training health professionals and providing equipment to health centres. This translated into a reduction in infant mortality rates from 149 per thousand births in 1995, to 101 per thousand births in 2003.

Other major improvements were recorded in child vaccination rates (in rural areas 55.7 percent of children had a health card and 41.4 percent had completed their vaccination programme, while in urban areas 89.2 percent of children had a health card and 79.2 percent had completed their vaccination programme) and in the percentage of attended births from 38 per cent in 1999 to 46 per cent in 2003. Immunisation rates against tuberculosis and measles were 87 percent and 77 percent respectively in 2003 (UNDP, 2005).

Despite these improvements, the health sector suffers from a series of weaknesses, including the lack of a comprehensive strategy in the area of maternal and paediatric care, low budget execution rates²² due to delays in disbursement from the government and donors and uneven access to health services between provinces.

There are still only 2 qualified physicians per 100,000 people and, in the rural areas, only 2.1 percent of the population have access to a doctor, 16.8 percent to a nurse, 19.7 percent to a midwife, 19.1 percent to a health post, 5.1 percent to a health centre and 4.6 percent to a pharmacy; while 93.7 percent use traditional healers (FAO, 2001).

Education

Public expenditure on education was 3.1 percent of GDP in 1990 (no later figures are available), representing 12 percent of total government expenditure. Of this expenditure, almost 50 percent was on pre-primary or primary school level. Improvements have been notable in education, with the net enrolment rate (NER) in primary education increasing by more than 25 percentage points between 1997 and 2003.

However, geographical and residential disparities remain high, affecting particularly children in the northern provinces of the country and in rural areas. In 2003, the net enrolment rate was just over 50 percent in Nampula, whereas in the southern provinces it was around 80 percent or more (INE, 2005).

The table below shows current tariffs for access to electricity:

Table 38 – Social, Domestic, Agricultural and General Tariffs for Low Voltage Electricity

Registered Consumption (kWh)	Sale Price				Fixed Tax (MZM)
	Social Tariff (MZM/kWh)	Domestic Tariff (MZM/kWh)	Agricultural Tariff (MZM/kWh)	General Tariff (MZM/kWh)	
From 0 to 100	911				
From 0 to 200		1,982	1,997	2,220	63.839
From 201 to 500		2,641	2,853	3,170	63.839
Up to 500		2,775	3,122	3,469	63.839
Pre-payment		2,527	2,780	3,185	

²² Public health expenditure was 4.1 percent of GDP in 2002.

II.2.4 Rural–urban drift

Mozambique's population is growing at approximately 1.7 percent annually. The urban working population is expected to grow at 4 percent until 2010. The UNDP Human Development Report, 2005 estimates that 48.5 percent of the population will be urban by 2015, up from 36 percent in 2003. Migration to neighbouring countries, especially South Africa, is still significant, despite the drop in recruitment levels by the South African mining industry in recent years.

II.3 Media and telecommunications

The use of Information and Communication Technologies (ICTs) remains low, but due to the rapid introduction of cellular phones the penetration rates of voice telephony have showed considerable improvement in recent years. The average yearly growth rate of the Telecom industry has been 19 percent since 1998 and by the end of 2004 the gross economic expenditure on telecom was 4.3 percent (INE et al, 2005).

The growth has mainly been in cellular subscribers, as fixed line contracts have showed a slight decline from 2001 (peak year). Mozambique still ranks lowest in Southern Africa in both phone and Internet connections. Computers and Internet connections are highly concentrated in the Maputo-city area and other major urban centres.

The role of ICTs in supporting the socio-economic development of the country has been recognised in both PARPA I (the Portuguese acronym for the PRSP) and Government Five-Year Programme for the period 2005-2009. These introduce several initiatives to support the development of the sector, including the universal access plan to build connectivity in rural areas, the establishment of a national network backbone and the construction of GovNet to support knowledge sharing, transparency and the integration of government institutions.

Also, the ICT Policy Implementation Strategy from 2002 builds a comprehensive framework of ICT-related initiatives needed to guarantee equal access to information services. The liberalisation of the telecommunication market has been one of the key contributors to the rapid growth of the telecom sector and citizen's access to telecommunication services (INE et al, 2005).

II.3.1 Newspapers, periodicals and broadcast media

Newspapers & Periodicals

Name: Notícias
Ownership: Joint Venture
Circulation: 13,000 daily
Agric & RD Focus: Regular
Website: -
Delivery Outlets: Street, shops, gas stations, subscribers

Name: Diário de Moçambique
Ownership: Joint Venture
Circulation: 5,000 daily
Agric & RD Focus: -
Website: <http://www.dmoz.co.mz/>
Delivery Outlets: Street, shops, gas stations, subscribers

Name: Vertical
Ownership: Private
Circulation: Daily
Agric & RD Focus: -
Website: -
Delivery Outlets: To subscribers via fax/email

Name: MediaFax
Ownership: Private
Circulation: Daily
Agric & RD Focus: -
Website: -
Delivery Outlets: To subscribers via email/fax

Name: Expresso da Tarde
Ownership: Private
Circulation: Daily
Agric & RD Focus: -
Website: -
Delivery Outlets: To subscribers via email/fax

Name: Agência de Informação de Moçambique
Ownership: Private
Circulation: Daily
Agric & RD Focus: -
Website: <http://www.sortmoz.com/aimnews/>
Delivery Outlets: To subscribers via email

Name: Matinal
Ownership: Private
Circulation: Daily
Agric & RD Focus: -
Website: -
Delivery Outlets: To subscribers via email/fax

Name: Correio da Manhã
Ownership: Private
Circulation: Daily except weekends
Agric & RD Focus: -
Website: <http://www.correiodamanha.co.mz/>
Delivery Outlets: To subscribers via email/fax

Name: Diário de Notícias
Ownership: Private
Circulation: Daily except weekends
Agric & RD Focus: -
Website: -
Delivery Outlets: To subscribers via email/fax

Name: Wamphula fax (Nampula)
Ownership: Private
Circulation: Twice a week
Agric & RD Focus: -
Website: -
Delivery Outlets: To subscribers by fax

Name: O Autarca (Beira)
 Ownership: Private
 Circulation: Three times a week
 Agric & RD Focus: -
 Website: -
 Delivery Outlets: To subscribers via email

Name: Demos (?)
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: -
 Delivery Outlets:

Name: Zambeze
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: <http://www.zambeze.co.mz/zambeze/>
 Delivery Outlets: Street, shops, gas stations, subscribers

Name: Expresso Diário Electrónico
 Ownership: Private
 Circulation: -
 Agric & RD Focus: -
 Website: -
 Delivery Outlets: To subscribers via email

Name: NotMOC (Notícias de Moçambique)
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: <http://www.mol.co.mz/notmoc/>
 Delivery Outlets: To subscribers via email

Name: O País
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: -
 Delivery Outlets: Street, shops, gas stations, subscribers

Name: Diário de Economia e Negócios
 Ownership: Private
 Circulation: Daily
 Agric & RD Focus: -
 Website: -
 Delivery Outlets:

Name: Jornal Amanhecer (Niassa)
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: -
 Delivery Outlets: Street, shops and gas stations

Name: Lúrio (Nampula) (?)
 Ownership:
 Circulation:
 Agric & RD Focus:
 Website:
 Delivery Outlets:

Name: Fim de Semana
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: <http://www.fimde semana.co.mz/>
 Delivery Outlets: Subscribers

Name: Imparcial
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: -
 Delivery Outlets: To subscribers via email/fax

Name: Domingo
 Ownership: Joint Venture
 Circulation: Weekly
 Agric & RD Focus: -
 Website: -
 Delivery Outlets: Street, shops, gas stations, subscribers

Name: Savana
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: Limited
 Website: www.mediacoop.odline.com
 Delivery Outlets: Street, shops, gas stations, subscribers

Name: Meianoite
 Ownership: Private
 Circulation: Weekly, 11 000
 Agric & RD Focus: -
 Website: -
 Delivery Outlets: Street, shops, gas stations, subscribers

Name: Desafio
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: -
 Delivery Outlets:

Name: Embondeiro
 Ownership: Private
 Circulation: Weekly
 Agric & RD Focus: -
 Website: -
 Delivery Outlets:

Name: Folha de Moçambique
Ownership: Private
Circulation: Daily
Agric & RD Focus: -
Website: -
Delivery Outlets: electronically

Technical Journals & Bulletins

Name: Folhas Verdes
Ownership: MINAG
Circulation: Monthly
Topics: Several related to agriculture
Website: -
Delivery Outlets: CDA

Name: Vida Silvestre
Ownership: DNFFB- MINAG
Circulation: Every three months
Topics: Forests and Wildlife
Website: -
Delivery Outlets: DNFFB

Name: Quente-Quente
Ownership: SIMA –MINAG
Circulation: Weekly bulletin
Topics: Information on agriculture markets (domestic prices of some products in producer, wholesale and retail prices). Regional and international prices for selected commodities and market commentary.
Website: -
Delivery Outlets: CDA

Name: Boletín Mensal
Ownership: SIMA-MINAG
Circulation: Monthly bulletin
Topics: Information on agriculture markets (domestic prices of some products in producer, wholesale and retail prices). Regional and international prices for selected commodities and market commentary.
Website: -
Delivery Outlets: CDA

Name: Aviso Prévio
Ownership: MINAG
Circulation: Every ten days or every month
Topics: Within the programme of food security : precipitation levels, agriculture campaigns, monitoring, etc
Website: -
Delivery Outlets: CDA

Name: Esisapo
Ownership: SIMA-MINAG
Circulation: Weekly bulletin for Nampula
Topics: Information on prices and trade opportunities
Website: -
Delivery Outlets: -

Name: Boletim de Divulgação
 Ownership: IIP
 Circulation: Sporadically (last publication in 2001)
 Topics: Information about the fisheries sector; development of small scale fisheries; artisanal fishing methods; commerce and semi-industrial fishing
 Website: -
 Delivery Outlets: IIP

Name: Revista de Investigação Pesqueira
 Ownership: IIP
 Circulation: Sporadically (last publication in 2003)
 Topics: Compilation of reports and studies about aquatic sciences and fisheries research
 Website: -
 Delivery Outlets: IIP

Name: Revista das Pescas
 Ownership: CIT
 Circulation: Quarterly
 Topics: -
 Website: <http://www.mozpesca.gov.mz/Publicacoes/Mozpesca.pdf>
 Delivery Outlets: Ministry of Fisheries

Name: Relatório do Cruzeiro de Investigação
 Ownership: IIP
 Circulation: Sporadically (last publication 2001)
 Topics: Marine resources, fisheries, evaluation of fisheries, cruise reports
 Website: -
 Delivery Outlets: IIP

Name: Relatório de Dados
 Ownership: IPP
 Circulation: Sporadically (last publication 1995)
 Topics: Several studies and workshops related to fisheries in Mozambique
 Website: -
 Delivery Outlets: IIP

Name: Boletim de Informação
 Ownership: IPP
 Circulation: Monthly bulletin
 Topics: List of received publications, brief news on the fishery's sector, event calendar
 Website: -
 Delivery Outlets: IIP

Name: MozPesca
 Ownership: IDPPE
 Circulation: Three times/month
 Topics: Artisanal fisheries and development
 Website: -
 Delivery Outlets: IDPPE

The Directorate of Economics of the Ministry of Agriculture maintains two publication series for research on food security issues. Publications under the Flash series are short (3 – 4 pages), carefully focused reports designated to provide timely research results on issues of great interest. Publications under the Research Paper series are designed to provide longer, more in depth treatment of food security issues.

Radio

Name: Rádio Moçambique
 Ownership: Government
 Broadcast hours: 24 hours
 Agric & RD Focus: -
 Website: <http://www.rm.co.mz/>
 Reach of Broadcast: 64% of country (daily), and the entire country (evening)

Name: Rádio Maria-Moçambique
 Ownership: Private, Roman-Catholic
 Broadcast hours: 16 hours (06am to 22pm)
 Agric & RD Focus: -
 Website: -
 Reach of Broadcast: Maputo and Gaza (trying to reach Inhambane)

Name: Rádio Progresso
 Ownership: Private
 Broadcast hours: 18 hours
 Agric & RD Focus: -
 Website: -
 Reach of Broadcast: 75 km within province (Beira)

Name: Rádio TGV
 Ownership: Private
 Broadcast hours: 24 hours
 Agric & RD Focus: -
 Website: www.9fm.co.mz
 Reach of Broadcast: Maputo and Beira

Name: Rádio Miramar
 Ownership: Private, owned by Igreja Universal de Deus
 Broadcast hours: 20 hours
 Agric & RD Focus: -
 Website: -
 Reach of Broadcast: Maputo, Beira, Nampula

Name: Rádio Feba Moçambique
 Ownership: Private, religious
 Broadcast hours: -
 Agric & RD Focus: -
 Website: www.feba.org.uk
 Reach of Broadcast: Gaza, Zambézia, Sofala, Cabo Delgado

Name: Rádio Cidade
 Ownership: Government
 Broadcast hours: 18 hours/day
 Agric & RD Focus: -
 Website: -
 Reach of Broadcast:

Name: Rádio Capital
Ownership: Private
Broadcast hours: 18 hours/day
Agric & RD Focus: -
Website: -
Reach of Broadcast: Maputo, Zambézia, Inhambane

Name: Rádio Ntyana
Ownership: Private (Associação da Mulher na Comunicação Social)
Broadcast hours: 13 hours/day
Agric & RD Focus: -
Website: -
Reach of Broadcast: Maputo Province

Name: Rádio SFM (?)
Ownership: Private
Broadcast hours:
Agric & RD Focus:
Website:
Reach of Broadcast:

Name: Rádio Terra Verde
Ownership: Private (linked to main opposition group Renamo)
Broadcast hours:
Agric & RD Focus: -
Website: -
Reach of Broadcast:

Name: Rádio Encontro
Ownership: Private
Broadcast hours: 17 hours/day
Agric & RD Focus: -
Website: -
Reach of Broadcast: Nampula Province

Name: Rádio Escola Moatize
Ownership: Private
Broadcast hours: 11 hours/day except Mondays
Agric & RD Focus: -
Website: -
Reach of Broadcast: Moatize only (Tete)

Name: Rádio África (?)
Ownership: Private
Broadcast hours:
Agric & RD Focus: -
Website:
Reach of Broadcast:

Today there are approximately 50 community radio stations in the country, with more than a third of the population living within reach of a radio station (UNESCO, 2005).

There are also two Community Multimedia Centres (CMCs), in Beira and Tete, which combine community radio and telecentre services to form a comprehensive information and communication platform serving local development needs.

Television

Name: TVM Televisão de Moçambique
Ownership: Government
Broadcast hours: 18 hours
Agric & RD Focus: -
Website: <http://www.tvm.co.mz/>
Reach of Broadcast: All major towns and some rural areas
http://www.tvm.co.mz/tvm_cobertura.htm

Name: STV
Ownership: Private
Broadcast hours: 24 hours
Agric & RD Focus: One-hour programme on weekdays
Website: <http://www.stv.co.mz/>
Reach of Broadcast: Maputo, Gaza, Inhambane e Sofala

Name: TVCabo
Ownership: Private
Broadcast hours:
Agric & RD Focus:
Website: <http://www.tvcabo.co.mz/>
Reach of Broadcast: Maputo and Matola Cities

Name: DSTV (?)
Ownership:
Broadcast hours:
Agric & RD Focus:
Website:
Reach of Broadcast:

Name: RTP África
Ownership: Private
Broadcast hours: 24 hours
Agric & RD Focus: -
Website: http://www.rtp.pt/web/empresa/rtp_africa.shtm
Reach of Broadcast:

II.3.2 Telecommunication services

There are three telecommunication companies presently operating in Mozambique. Two of them provide only mobile communication services. Telecomunicações de Moçambique S.A.R.L (TDM) is the original national telecommunications operator in the country. There are 6 companies which form part of the TDM group, of which TDM is a shareholder.

The number of subscribers of TDM, as of December 2005, was 69,735. TDM covers approximately 83% of the country, including rural areas.

Cost of a three minute local call (in MZM):

	Subscribers	Public Phones
Local	3,420.00	5,382.00
Interurban	6,660.00	9,226.00
Mobile	22,500.00	32,292.00

Mobile Companies

mCel (Moçambique Cellular), was the first private mobile phone company in the country, established in 1997. It covers all main urban centres.

Subscribers:

Costs/minute (in MZM):

	mCel network	Fixed phone	Other mobile network
Cost (MZM)	2,950.00	5,100.00	5,100.00

A second GSM licence was granted to **Vodacom International** in association with local partners (Emotel, a consortium of local businesspeople, and the war veterans association). Vodacom Moçambique's services launch was delayed by a year and when operations finally began in late 2003, Vodacom only covered limited portions of the country, and the price of pre-paid cards has basically remained unchanged despite the theoretically more competitive conditions (OPEC, 2004). It covers main towns, all provincial capitals, all main roads and some rural areas.

Subscribers:

Costs/minute (in MZM):

	Vodacom network	Fixed phone	Other mobile network
Cost (MZM)	5,850.00	8,750.00	5,850.00

II.3.3 Computers and the Internet

Today, there are approximately 3,5 computers per 1000 people in Mozambique, and around 138,000 internet users or 0.7 percent of the population (Internet World Statistics). It is also reported that 75 percent of all internet users are based in Maputo. Internet access is available in all major towns through both 'dial-up' and ADSL, being dial-up the most commonly used. There are now 14 Internet service providers and 16-18 POP's (at least one in each province).

Internet Service Providers and (three-month) subscription fees

TVCabo:	US\$ 195 (ADSL)
Teledata:	US\$ 70 (dial-up)
Intra:	US\$ 225 (ADSL)
CIUEM (Centro de Informática da Universidade Eduardo Mondlane):	US\$ 75 (dial-up)
Virconn Virtual connection:	US\$ 75 (dial-up)
Tropicalweb:	US\$ 63 (dial-up)
EMIL Computer Business Centre, Lda	
GsTelecom (?)	
Satcom:	US\$ 240 (ADSL)
Sort Moçambique Lda:	US\$ 105 for (dial-up)
I.S.L Internet Solutions Lda	(?)
GARP Net: GARP ISP Mozambique	(?)
Imoz.com Internet Mozambique	(?)
IT Services Lda:	US\$ 55 (dial-up)

Telecentres

Mozambique has eight public access telecentres in the provinces of Maputo, Gaza, Inhambane and Manica. High costs associated with the establishment of telecentres have prevented its widespread use. These centres provide a range of services, including writing and printing, data processing, email, internet access, learning how to use computers, photocopies, public telephone and fax, sale of newspapers and magazines and video and television sessions.

III. Profile of institutions – Mozambique

III.1 List of all institutions

List of institutions in the agricultural sector

Name and contacts	Type	Role
Org: Acção para o Desenvolvimento Comunitário (ADC) Name: Jonas Missingo – Director General Address: R do Comércio, 70-72, Machava Tel : 258-21-752165 Fax : 258-21-752167 Email : adcmoz@virconn.com Web site :	NGO	RU
Name and contacts	Type	Role
Org: Adventist Development and Relief Agency (ADRA) Name: Curtis C. Hesse – Director Nacional Address: Av Eduardo Mondlane, 2091, r/c, Maputo Tel : 258-21-304422/3 Fax : 258-21-320487 Email : chesse@adra.org.mz Web site : www.adra.org.mz/		RU
Name and contacts	Type	Role
Org: Agência para o Desenvolvimento Económico Local (ADEL) Name: - Address: Av Trigo Morais, 88, Matola Tel: 258-21-782519 Fax: 258-21-782520 Email: Web site:		
Name and contacts	Type	Role
Org: Associação para Agricultura Biológica e Desenvolvimento Sustentável (ABIODES) Name: Nordino Ticongolo – Address: Av Eduardo Mondlane, 2221, 2 nd Floor, Maputo Tel : 258-21-314854 Fax : 258-21314854 Email : abiodes@teledata.mz Web site : www.abiodes.org.mz/	NGO	RU
Name and contacts	Type	Role
Org: Agricultura e Comercio Internacional (AGRIFOCUS) Name: Ricardo Sequeira – Director General Address: Av 25 Setembro, Bl 2-1 ^o Edif Time Square, Maputo Tel : 258-21-303668 Fax : 258-21-303665 Email : agrifocus@tropical.co.mz Web site :	PRV	
Name and contacts	Type	Role
Org: Agricultura e Pecuária Lda () Name: - Address: Bairro B Incomati Xinavane, Tel: 258-21-870015 Fax: Email: Web site:	PRV	
Name and contacts	Type	Role
Org: Agrimoc Lda () Name: - Address: R Kongwa, 90, 1 st Floor, Maputo Tel: 258-21-305218 Fax: Email: Web site:	PRV	
Name and contacts	Type	Role
Org: Agrius Moçambique Lda () Name: - Address: Av 25 Setembro, 1123, 9 th Floor, Maputo Tel: 258-21-310051 Fax: Email: Web site:	PRV	

Name and contacts	Type	Role
Org: Ajuda de Desenvolvimento do Povo para o Povo (ADPP) Name: Birgitte Holm – Director Address: R Berta Caiado, 259, Machava Tel: 258-21-750106 Fax: 258-21-750107 Email: adppmz@teledata.co.mz Web site: www.humana.org	NGO	RU
Name and contacts	Type	Role
Org: Apoio ao Desenvolvimento de Iniciativas Privadas ao Sector Agrário (ADIPSA) Name: Henriques Bettencourt – Director Address: Av 25 Setembro, 679, Chimoio Tel: 258-251-22874 Fax: 258-251-23477 Email: Web site:	GOV	FS TM RU
Name and contacts	Type	Role
Org: Associação dos Pequenos e Médios Agricultores e Criadores de Gado (PEMAC) Name: Martins Langa – Address: Av 25 de Setembro, 1509, 6 th Floor, room 4, Maputo Tel: 258-21-311924 Fax: 258-21-421120 Email: Web site:	NGO	TR RU
Name and contacts	Type	Role
Org: Associação Agro Pecuária e Pesca () Name: - Address: Estr Nacional nº6, Dondo Tel: 258-23-950494 Fax: Email: Web site:		
Name and contacts	Type	Role
Org: Associação Agro-Industrial e Comercial do Niassa (AAGICONI) Name: - Address: , Tel: Fax: Email: Web site:		
Name and contacts	Type	Role
Org: Associação Agro-Pecuária das Mulheres de Changalene (AMPRODEC) Name: - Address: R Dr. Redondo, 93, Changalane, Maputo Tel: Fax: Email: Web site:		RU
Name and contacts	Type	Role
Org: Associação Algodoeira de Moçambique (AAM) Name: - Address: , Maputo Tel: 258-21-309908 Fax: 258-21-422634 Email: paulonegrao@tvcabo.co.mz; capital@jfs.co.mz Web site:	PRV	
Name and contacts	Type	Role
Org: Associação Comercial de Moçambique (ACM) Name: Salim Abdula – President Address: Av 10 de Novembro, Facim pavillion no 30, Maputo Tel: 258-21-424387 Fax: 258-21-424388 Email: Web site:	PRV	
Name and contacts	Type	Role
Org: Associação Comercial Industrial e Agrícola de Nampula (ACIANA) Name: - Address: , Tel: Fax: Email: Web site:		

Name and contacts	Type	Role
Org: Associação Comunitária para Saúde e Desenvolvimento (ACOSADE) Name: Bartolomeu Ernesto Langa – Address: Bairro 1, Posto Administrativo de Chicumbane-sede, Gaza Tel : Fax : Email : octaviomuhate@yahoo.com.br Web site :		
Org: Associação das Empresas Privadas de Moçambique (AEPRIMO) Name: - Address: R Timor Leste, 58, 1 st Floor, Maputo Tel: 258-21-424002 Fax: 258-21-475308 Email: Web site:	PRV	
Org: Associação de Apoio à Protecção do Meio Ambiente e aos Desprotegidos (OPMAD) Name: Benjamim Gonçalves – Address: PO Box 4142, Maputo Tel: 258-21-304255 Fax: 258-21-304255 Email: Web site:	NGO	RU
Org: Associação de Camponeses para o Desenvolvimento Rural (ACADER) Name: - Address: , Tel: Fax: Email: Web site:	AS-F	RU
Org: Associação de Fomento para o Desenvolvimento Comunitário () Name: Germano Rosário – Address: PO Box 1677, Sofala Tel: 258-23-324252 Fax: Email: Web site:		
Org: Associação de Fruticultores de Moçambique (Frutisul) Name: José Alcobia – Address: PO Box 1623, Matola Tel: 258-21-721414 Fax: 258-21-720203 Email: Web site:	PRV	TR IN
Org: Associação de Saúde Comunitária (SALAMA) Name: - Address: , Tel: Fax: Email: Web site:	NGO	RU
Org: Associação dos Amigos da Ilha de Moçambique (AAIM) Name: - Address: , Tel: Fax: Email: Web site:	NGO	RU
Org: Associação dos Camponeses de Mareja () Name: Sonja Capello – Address: R Base Beira, 208, Cabo-Delgado Tel : 258-272-20684 Fax : 258-272-21099 Email : sonja@mareja.com Web site :	AS-F	RU

Name and contacts	Type	Role
Org: Associação dos Camponeses Ovaha wa Muluku wa Atxu Ohawa (ACOMAO) Name: Rosária Francisco – Address: Mulevala. Ile, Zambezia Tel: 258-24-214410 Fax: 258-24-214410 Email: Web site:	AS-F	RU
Name and contacts	Type	Role
Org: Associação dos Fruticultores do Norte (FRUTINORTE) Name: João Bauleta – Address: , Tel: Fax: Email: Web site:		
Name and contacts	Type	Role
Org: Empresa Nacional de Comercio (ENACOMO) Name: Kekobad Patel – President Address: Av Samora Machel, 20, 2 nd Floor, Maputo Tel: 258-21-427471 Fax: 258-21-427754 Email: enacomosede@virconn.net Web site:	PRV	
Name and contacts	Type	Role
Org: Associação dos Jovens Agricultores de Moçambique (AJAM) Name: Simão Sevene – Address: Av Marien, 821, Bairro da Malanga, Maputo Tel : 258-21-400997 Fax : 258-21-400997 Email : ajam.sevene@teledata.mz Web site :	NGO	RU FS
Name and contacts	Type	Role
Org: Associação dos Produtores Agrários de Mocambique (AGRARIOS) Name: Samuel Chissico – Address: Av 25 de Setembro, 1509, 6 th Floor, room 5, PO Box 445, Maputo Tel: 258-21-428489 Fax: 258-21-428489 Email: Web site:	AS-F	RU
Name and contacts	Type	Role
Org: Associação dos Produtores de Açúcar de Moçambique (APAMO) Name: Rosário Cumbi – Address: Av Zedequias Manganhela, 520, 2 nd Floor, flat 3, Maputo Tel: 258-21-422883 Fax: 258-21-422540 Email: apamoemail@teledata.mz Web site:		
Name and contacts	Type	Role
Org: Associação dos Produtores de Banana (APEB) Name: Matias Mboa – President Address: , Maputo Tel: 258-21-421512 Fax: 258-21-420154 Email: Web site:	PRV	
Name and contacts	Type	Role
Org: Associação dos Produtores de Sal do Sul do Save (APSASS) Name: - Address: Av 24 de Julho, 2021, Tel: 258-21-301255 Fax: Email: Web site:		

Name and contacts	Type	Role
Org: Associação dos Produtores de Sementes do Baixo Limpopo (APROSEL) Name: - Address: , Tel: Fax: Email: Web site:		
Org: Associação dos Técnicos Agro-Pecuários (ATAP) Name: Luis Fortunato – Address: Av Marien N’Gouabi,203, ground floor, PO Box 2559/2556, Maputo Tel : 258-21-311265 Fax : 258-21-311264 Email : atap@zebra.uem.mz Web site :	AS-F	RU
Org: Associação Industrial de Moçambique (AIMO) Name: Carlos Simbine – President Address: Avenida 24 Julho, 2021 – PO Box 700, Maputo Tel: 258-21-424659 Fax: 258-21-421377 Email: Web site:	NGO	
Org: Associação Juvenil para o Desenvolvimento da Agricultura () Name: - Address: Av Olof Palme, 683, 2 nd Floor, Tel: 258-82-2700040 Fax: Email: Web site:		
Org: Associação Juvenil Para o Desenvolvimento do Voluntariado em Moçambique (AJUDE) Name: Paulo de Araújo – Coordinator Address: R da Mesquita, 222, 1st Floor, Flat 15, Maputo Tel: 258-21-312854 Fax: 258-21-312854 Email: ajude@virconn.com Web site:	AS-Y	
Org: Associação Moçambicana da Mulher Rural (AMRU) Name: - Address: Av Karl Marx, 617, 1 st Floor – CP 1892, Maputo Tel : 258-21-422809 Fax : 258-21-422893 Email : asmru@zebra.uem.mz Web site :	NGO	RU
Org: Associação Moçambicana de Apoio à Comunidade (AMACO) Name: Ernesto Matique – Address: CP 698, Beira Tel: 258-23-324086 Fax: 258-23-323910 Email: Web site:	NGO	RU
Org: Associação Moçambicana de Mulheres Empresárias e Executivas (AMMEE) Name: Angélica Salomão – Address: , Maputo Tel: 258-21-423506 Fax: 258-21-423506 Email: Web site:	NGO	
Org: Associação Moçambicana dos Armadores de Pesca Industrial de Camarão (AMAPIC) Name: Felisberto Manuel – President Address: Av. 25 de Setembro, 1123, 11th Floor C, Maputo Tel: 258-21-308464 Fax: 258-21-308465 Email: amapic@teledata.mz Web site:		

Name and contacts	Type	Role
Org: Associação Mocambicana Mulher e Educação (AMME) Name: - Address: Av Eduardo Mondlane, 1928, Maputo Tel: 258-21-423375 Fax: 258-21-431895 Email: Web site:	NGO	
Name and contacts	Type	Role
Org: Associação Mocambicana para a Promoção de Actividades de Alívio à Pobreza (PALIP) Name: Janete Manuel Luave – Address: Av. 25 de Setembro, 1509, 3 rd Floor, room 4, Maputo Tel: 258-21-301151 Fax: Email: Web site:	€	FS
Name and contacts	Type	Role
Org: Associação Moçambicana para o Desenvolvimento (AMODESE) Name: Bernardo Ginja – Executive Director Address: Av. Lucas Luali, 475, ground floor, Maputo Tel: 258-21-403631 Fax: 258-21-407638 Email: amodese@tvcabo.co.mz Web site:	NGO	RU
Name and contacts	Type	Role
Org: Associação Moçambicana para o Desenvolvimento da Família (AMODEFA) Name: Joaquina Uate – Project Coordinator Address: Av da Tanzania, 376, PO Box 1535, Maputo Tel: 258-21-405107 Fax: 258-21-405149 Email: informe@amodefa.org.mz Web site: www.amodefa.org.mz	NGO	
Name and contacts	Type	Role
Org: Associação Moçambicana para o Desenvolvimento da Juventude (ARO Juvenil) Name: - Address: R Capitão Henriques de Sousa, 45, Maputo Tel : 258-21-313741 Fax : 258-21-313741 Email : arojuvenil@isl.co.mz Web site :	NGO	
Name and contacts	Type	Role
Org: Associação Moçambicana para o Desenvolvimento Rural (AMODER) Name: José Carlos Trindade – Executive Director Address: Av Salvador Allende, 1164, 1 st Floor, PO Box 4275, Maputo Tel : 258-21-490484 Fax : 258-21-491020 Email : amoder.cumaba@teledata.mz Web site :	NGO	RU
Name and contacts	Type	Role
Org: Associação Nacional para o Desenvolvimento Auto-Sustentado (ANDA) Name: Tiago Jaime – Coordinator Address: Chimoio- Manica Estrada Nacional nº1, Manica Tel: 258-251-62164 Fax: 258-251-62164 Email: Web site:	NGO	FS RU
Name and contacts	Type	Role
Org: Associação Não-Governamental para o Desenvolvimento de Sofala, Tete, Manica, Zambézia (SOTEMAZA) Name: Samuel Forquilha – Address: PO Box 4635, Maputo Tel: 258-21-422456/7 Fax: 258-21-422459 Email: Web site:	NGO	TR

Name and contacts	Type	Role
Org: Associação para a Conservação da Fauna Bravia de Moçambique – UEM () Name: Prof Patrocínio da Silva – Address: PO Box 698, Maputo Tel: 258-21-475155 Fax: 258-21-430315 Email: pat@bufalo.uem.mz Web site:		
Org: Associação para a Promoção e Desenvolvimento da Mulher (APDM) Name: Ms O.A. Macupulane – Address: PO Box 4285, Maputo Tel: 258-21-406826 Fax: Email: Web site:	NGO	RU
Org: Associação para a Saúde Ambiental (ASA) Name: Romão Anibal Salomão – Address: Av Samora Machel, 16, Xai-Xai, Gaza Tel: Fax: 258-282-22349 Email: Web site:	NGO	
Org: Associação para o Desenvolvimento Agro-Pecuário para o Sector Familiar (ADAP/SF) Name: Ernesto Jaime – Coordinator Address: Av Josina Machel, 799, Nampula Tel: 258-26-217202 Fax: 258-26-218416 Email: Web site:	NGO	RU EX
Org: Associação para o Desenvolvimento da Comunidade e Meio Ambiente () Name: Paulo Weng – Address: R das Mahotas, 143, Maputo Tel: Fax: 258-21-304326 Email: apdcoma@isl.co.mz Web site:	NGO	
Org: Associação para o Desenvolvimento da Província de Nampula (ASSANA) Name: - Address: , Tel: Fax: Email: Web site:	NGO	RU
Org: Associação para o Desenvolvimento da Região Sul da Província de Nampula (EREHEMA) Name: Américo Tavares – Address: CP 86, Nampula Tel: Fax: Email: Web site:		
Org: Associação para o Desenvolvimento das Áreas Protegidas () Name: Antoine Bossel – Address: Av 10 de Novembro, 8, Pavilhão Q1, Maputo Tel: 258-82-7306130 Fax: Email: Web site:	NGO	

Name and contacts	Type	Role
Org: Associação para o Desenvolvimento das Comunidades Rurais (ADCR) Name: Henrique Alberto Chissano – Executive Director Address: R Maguiguana, CP 210, Xai-Xai Tel : 258-282-26781 Fax : 258-282-22740 Email : adcr.xaixai@teledata.mz Web site :	NGO	RU TR
Name and contacts	Type	Role
Org: Associação para o Desenvolvimento de Projectos Rurais (ADPRUM) Name: - Address: R de Bagamoyo, 186, 3 rd Floor, Maputo Tel: 258-21-300356 Fax: Email: Web site:	NGO	RU
Name and contacts	Type	Role
Org: Associação para o Desenvolvimento dos Agricultores e Comerciantes das Zonas Rurais de Cabo Delgado (ADACOR) Name: Matuaia Mocimboa – Address: Rua do Comércio, no Gabinete de Prestação de Serviços, Pemba Tel: Fax: Email: Web site:		
Name and contacts	Type	Role
Org: Associação para o Desenvolvimento Regional de Cabo Delgado (UMOKAZI) Name: - Address: R da Capitania, 2 – PO Box 315, Pemba Tel: Fax: Email: Web site:	NGO	RU
Name and contacts	Type	Role
Org: Associação para o Desenvolvimento Social de Camponeses (ADESCA) Name: - Address: CP 268, Lichinga Tel: Fax: Email: Web site:		
Name and contacts	Type	Role
Org: Associação Rural Africana (ARA) Name: Custódio Gabriel Bila – Address: R Atriz Maria Matos, 44, Ground Floor, Maputo Tel: Fax: 258-21-308015 Email: Web site:	NGO	
Name and contacts	Type	Role
Org: Associação Rural de Ajuda Mútua (ORAM) Name: João David Mutombene – Director Address: Av Da Maguiguana, 1721, PO Box 2587, Maputo Tel : 258-21-302957 Fax : 258-21-302958 Email : oram@oram.uem.mz Web site :	NGO	RU IN
Name and contacts	Type	Role
Org: Associação Rural de Alívio e Combate à Pobreza (ARCAP) Name: Sidónio João do Rosário Brás – President Address: Av Vlademir Lenine, 1071, 4 th Floor – PO Box 4354, Maputo Tel: 258-82-4823890 Fax: 258-21-431015 Email: Web site:	NGO	RU
Name and contacts	Type	Role
Org: Associação Zambeziana para o Desenvolvimento Rural (AZADER) Name: Raúl J. Domingos – President Address: , Quelimane Tel: 258-24-213128 Fax: 258-24-213128 Email: Web site:	NGO	RU TR FS EX

Name and contacts	Type	Role
Org: Banco Austral () Name: Gerardo Brandoni – Finance Administrator Address: Av 25 de Setembro, 1184 – PO Box 757, Maputo Tel: 258-21-308800 Fax: 258-21-323470 Email: Web site: www.bancoaustral.co.mz/	BNK	FS
Name and contacts	Type	Role
Org: Banco Comercial de Moçambique (BCM) Name: Álvaro Henriques – Administrator Address: Av. 25 de Setembro, 1695 – PO Box 423, Maputo Tel: 258-21-428151 Fax: 258-21-423247 Email: Web site:	BNK	FS
Name and contacts	Type	Role
Org: Banco Comercial e de Investimentos (BCI) Name: Dr José Valentim Barbieri – Deputy President Address: Av 25 de Setembro, 1465, Maputo Tel: 258-21-314981 Fax: Email: Web site:	BNK	FS
Name and contacts	Type	Role
Org: Banco de Fomento () Name: - Address: Av Julius Nyerere, 1016, PO Box 4233, Maputo Tel: 258-21-494010/1 Fax: 258-21-494401 Email: Web site:	BNK	FS
Name and contacts	Type	Role
Org: Banco Internacional de Moçambique (BIM) Name: - Address: , Tel: Fax: Email: Web site: www.mundobim.co.mz/	BNK	FS
Name and contacts	Type	Role
Org: Banco Popular de Desenvolvimento (BPD) Name: Boaventura Cossa – Presidente do Conselho de Administração Address: Avenida 25 de Setembro, 1184 – PO Box 757, Maputo Tel: 258-21-428125 Fax: 258-21-423470 Email: Web site:	BNK	FS
Name and contacts	Type	Role
Org: Caritas (CARITAS) Name: Henrique del Castillo – Address: R da Resistencia, 1175, Maputo Tel: 258-21-419933/4 Fax: 258-21-419578 Email: caritmsj@tvcabo.co.mz Web site: www.caritas.moz	NGO	RU
Name and contacts	Type	Role
Org: Centro de Desenvolvimento Rural (Kuchigingi) Name: Alice Jaime Chapola – Manager Address: R do Aeroporto, Lichinga Tel: 258-271-20336 Fax: 258-271-20336 Email: Web site:		
Name and contacts	Type	Role
Org: Centro de Desenvolvimento Sustentável para as Zonas Costeiras – Ministério para a Coordenação da Acção Ambiental (CDS) Name: Hermes Pacule – Director Address: Edifício Micoa, Prédio Xai-Xai, PO Box 66, Xai-Xai Tel : 258-282-35004 Fax : 258-282-35062 Email : cdscoastal@teledata.mz Web site :	GOV	RU

Name and contacts	Type	Role
Org: Centro de Experimentação Florestal (CEF) Name: Muino Taquidir – General Director Address: R da Resistência, PO Box 8, Marracuene, Maputo Tel : Fax : Email : cefdnffb@teledata.mz Web site : www.map.gov.mz/dnffb/cef.html	GOV	RD
Name and contacts	Type	Role
Org: Centro de Formação Agrária (CFA) Name: Albino Mazembe – Director Address: Av FPLM, PO Box 3658, Maputo Tel : 258-21-462389 Fax : 420220 Email : cfa@emilmoz.com Web site :	GOV	RU
Name and contacts	Type	Role
Org: Centro de Informação e Treino – Ministerio das Pescas (CIT) Name: - Address: R Consiglieri Pedroso, 347, 3 rd Floor, Maputo Tel : 258-21-309605 Fax : 258-21-420335 Email : acandido@mozpesca.gov.mz Web site : www.mozpesca.gov.mz/pg_CIT.html	GOV	IN
Name and contacts	Type	Role
Org: Centro de Promoção de Serviços Financeiros Rurais (CPSFR) Name: - Address: Av Zedequias Manganhela, 267, 5 th Floor ^o , Maputo Tel : 258-21-300679 Fax : 258-21-429163 Email : cpsfr@cpsfr.org.mz Web site : www.cpsfr.org.mz/	BNK	FS
Name and contacts	Type	Role
Org: Centro Nacional de Produção Mais Limpa (CNPML) Name: Leonardo Guirruta – Address: Av 24 de Julho, 2021, Maputo Tel : 258-21-307794/307808 Fax : 258-21-307794 Email : mncpc1@teledata.mz Web site :	GOV	
Name and contacts	Type	Role
Org: Centro de Promoção de Investimentos (CPI) Name: Augusto Sumburane – Director Address: Av 25 de Setembro, 2049, PO Box 4487, Maputo Tel: 258-21-422456 Fax: 258-21-422459 Email: Web site: www.cpi.co.mz	PRV	
Name and contacts	Type	Role
Org: CITRUN () Name: Paulo Negrão – General Director Address: , Tel: Fax: Email: Web site:	PRV	PS-P RU
Name and contacts	Type	Role
Org: Companhia Agro Pecuária de Mocambique Lda (AGRIMO) Name: - Address: Av 24 de Julho, 2096, 6 th Floor, Flat 605/6, Maputo Tel : 258-21-308318 Fax : 258-21308317 Email : agrimona@teledata.mz Web site :	PRV	
Name and contacts	Type	Role
Org: Companhia Agro-Industrial Lonrho Moçambique Lda (LOMACO) Name: - Address: Av 25 Setembro, 1509-3 ^o , Maputo Tel: 258-21-308185 Fax: 258-21-322634 Email: Web site:	PRV	

Name and contacts	Type	Role
Org: Confederação das Associações Económicas de Moçambique (CTA) Name: Sérgio Chitara – Executive Director Address: Av 10 de Novembro, PO Box 2975, Maputo Tel : 258-21-311734/5 Fax : 258-21-311732 Email : info@cta.org.mz Web site :	PRV	
Org: Conselho Cristão de Moçambique (CCM) Name: Bispo Sengulane – President Address: Av Agostinho Neto, 1584 – PO Box 188, Maputo Tel : 258-21-322836 Fax : 258-21-321968 Email : com-ccmhq@isl.co.mz Web site :	CHU	RU
Org: Cooperativa das Casas Agrárias (CCA) Name: Ms Rita Tamatama – Address: CP 35, Xai-Xai Tel: 258-282-22736 Fax: Email: Web site:	NGO	RU
Org: Cooperativa de Crédito e Poupança (Tchuma) Name: - Address: Av 24 de Julho, 1913/1917, Maputo Tel: 258-21-307749 Fax: 258-21-312203 Email: tchuma@teledata.mz Web site:	BNK	FS
Org: Credicoop – Cooperativa de Crédito e Investimentos (SCRL) Name: Egas Mussanhane – President Address: R Joaquim Lapa, 37 – PO Box 4725, Maputo Tel: 258-21-421272 Fax: 258-21-421372 Email: Web site:	BNK	FS
Org: Cruzeiro do Sul () Name: Luis Filipe Pereira – Director Address: Av 24 de Julho, 285, 2 nd Floor, Flat 3, Maputo Tel : 258-21-493561 Fax : 258-21-493561 Email : cruzeirodosul.iid@tvcabo.co.mz Web site : www.iid.org.mz/index.html	NGO	
Org: Direcção Nacional de Desenvolvimento Rural () Name: Gabriel Tember – Director Address: CP 4518, Maputo Tel : 258-21-460290 Fax : 258-21-414622 Email : ddc.mate@teledata.mc Web site :	GOV	
Org: Direcção Nacional de Hidráulica Agrícola (DNHA) Name: Aurário Nelson Melo – Director Address: R da Resistência, 1746, PO Box 2272, Maputo Tel : 258-21-415110 Fax : 258-21-415103 Email : dnha@zebra.uem.mz Web site :	GOV	RU
Org: Direcção Nacional de Pecuária (DINAP) Name: - Address: Pç Heróis Moçambicanos, Maputo Tel: 258-21-460534 Fax: 258-21-460534 Email: Web site:	GOV	RU

Name and contacts	Type	Role
Org: Direcção Provincial de Agricultura e Desenvolvimento Rural, Serviços Provinciais de Florestas e Fauna Bravia (DPADR-SPFFB) Name: Cremildo Rungo – Address: R. Pigivide 678, PO Box 42, Manica Tel : 258-251-2289/75 Fax : 258-251-22706 Email : crungo@dpadrmanica.org Web site :	GOV	
Org: Direcção Provincial de Desenvolvimento Rural de Niassa – Serviços Provinciais de Florestas e Fauna Bravia/Comunidade de Sanga () Name: António Abacar – Address: Rua Principal 1, PO Box 43, Lichinga Tel : 258-271-20917 Fax : 258-271-20557 Email : spffb-upmcn@teledata.mz Web site :	GOV	RU
Org: Domestication and marketing of indigenous fruit tree of the Miombo for improved household nutrition and incomes in Southern Africa () Name: - Address: , Tel: Fax: Email: Web site:		
Org: Empresa Comercial e Agro-pecuária de Moçambique, Lda (AGRI-PEC) Name: - Address: , Tel: Fax: Email: Web site:	PRV	
Org: Empresa de Gestão Agrária Lda (EGA) Name: - Address: Av Julius Nyerere, 938, Maputo Tel: 258-21-483127 Fax: Email: Web site:	PRV	
Org: Empresa Moçambicana de Pesca E.E. (EMOPESCA) Name: - Address: R. Almeida Garrett, 46, coop, PO Box 4322, Maputo Tel : Fax : Email : emopesca@virconn.com Web site :	PRV	PS-P
Org: Enhancing Agricultural Development for Poverty Reduction in Africa – A joint NEPAD/IFPRI Program () Name: - Address: , Tel: Fax: Email: Web site:	REG	RU
Org: Fapromel – Agro Lda () Name: Milton Jussias – Director Address: Av Romão F Farinha, 125, Maputo Tel: 258-21-302025 Fax: 258-21-302025 Email: Web site:	PRV	

Name and contacts	Type	Role
Org: Fórum Mulher: Coordenação para a Mulher no Desenvolvimento () Name: Graça Samo – Director Address: R Pereira do Lago, 147, 3rd Floor, Maputo Tel : 258-21-493437 Fax : 258-21-493437 Email : forum@forumulher.org.mz Web site : www.forumulher.org.mz	NGO	IN TR
Org: Fórum Terra () Name: Marina Pancas – Address: R do Telégrafo, 122, 2 nd Floor, Maputo Tel: 258-21-486324 Fax: 258-21-486324 Email: Terra.forum@tvcabo.co.mz Web site:	NGO	
Org: Frutimel () Name: - Address: , Tel: Fax: Email: Web site:	CCI	PS-P IN EX
Org: Fundação para o Desenvolvimento da Comunidade (FDC) Name: Carlos Fumo – Director Address: Av Eduardo Mondlane, 1170, Ground Floor, Maputo Tel : 258-21-430430/1 Fax : 258-21-422595 Email : fdc@zebra.uem.mz Web site :	NGO	IN RU TR FS
Org: Fundo de Crédito Comunitário (FCC) Name: Claudien Nsengimane – Director Address: Av Kenneth Kaunda, 1174, PO Box 680, Maputo Tel : 258-21-486180 Fax : 258-21-486184 Email : fcc@tvcabo.co.mz Web site : www.wr.org	BNK	FS
Org: Fundo de Desenvolvimento Agrícola e Rural () Name: Mr E. Oliviera – Address: PO Box 1406, Maputo Tel: 258-21-460349 Fax: 258-21-460157 Email: Web site:		RU
Org: Fundo de Fomento à Pequena Indústria (FFPI) Name: Pascoal Themba – Representative Address: Av Samora Machel, 30, 4 th Floor, Maputo Tel : 258-21-324090/323116 Fax : 258-21-430093/312379 Email : ffpi-sede@tvcabo.co.mz Web site :	BNK	FS RU
Org: Fundo de Fomento Pesqueiro (FFP) Name: Manuel Luis Gonçalves – Presidente do Conselho de Administração Address: Av Emília Daússe, 591, Maputo Tel: 258-21-300574 Fax: 258-21-300584 Email: Web site:	BNK	FS
Org: Gabinete de Apoio à Pequena Indústria (GAPI) Name: António Souto – Managing Director Address: R. De Mocumbura, 434, Maputo Tel: 258-21-491505 Fax: 258-21-491584 Email: Web site:	GOV	

Name and contacts	Type	Role
Org: Hygrotech Moçambique Lda () Name: Rui Santos – Director Address: Av 10 Novembro Facim, Pav P, Maputo Tel : 258-21-305522 Fax : 258-21-305539 Email : hygrotech@gmail.com Web site :	PRV	
Name and contacts	Type	Role
Org: Instituto de Desenvolvimento da Pesca de Pequena Escala (IDPPE) Name: Simião Lopes – Director Address: Av Marginal, Parceria 141/8, PO Box 2473, Maputo Tel : 258-21-490807 Fax : 258-21-494974 Email : idppe@idppe.org Web site :	GOV	RD
Name and contacts	Type	Role
Org: Instituto Nacional de Desenvolvimento Rural (INDER) Name: João Z Carrilho – Address: Avenida Acordos de Lusaka, 2215 – CP 1310, Maputo Tel: Fax: Email: Web site:	GOV	RD IN TR
Name and contacts	Type	Role
Org: Instituto de Produção Animal (IPA) Name: Paula Pimentel – Director Address: R.da Namaacha KM 11.5, CP 1410, Matola Tel : 258-21-720395/6 Fax : 258-21-720396 Email : plofate@hotmail.com ipa@isp.co.mz ipa@uninet.co.mz Web site :	GOV	RD
Name and contacts	Type	Role
Org: Instituto Marquês de Valle Flor (IMVF) Name: Mr José Pino Rocha – Address: CP 1693, Maputo Tel: 258-21-494019 Fax: 258-21-492566 Email: imvf@zebra.uem.mz Web site:	PRV	RU
Name and contacts	Type	Role
Org: Instituto Nacional de Desenvolvimento da Indústria Local () Name: Alberto Santos – President Address: Av. Das Industrias, 7618, Maputo Tel: 285-21-422179 Fax: 258-21-430226 Email: Web site:	GOV	TR RD
Name and contacts	Type	Role
Org: Instituto Nacional de Investigação Agronómica (INIA) Name: Dr. Calisto Bias – Director Address: Av das FPLM, 2698, CP 3658, Maputo Tel: 258-21-460190 Fax: 258-21-460074 Email: deptoban@zebra.uem.mz iniadirector@teledata.mz Web site:	GOV	RD
Name and contacts	Type	Role
Org: Instituto Nacional de Investigação Veterinária (INIVE) Name: Rosa Costa – Director Address: Av de Mocambique, 1929, Maputo Tel: 258-21-475161 Fax: 258-21-475172 Email: inivie@teledata.mz Web site:	GOV	RD RU
Name and contacts	Type	Role
Org: Instituto para a Promoção de Exportações (IPEX) Name: Felisberto Manuel – Address: Av. 25 de Setembro, 1998 or 1008 – CP 4487, Maputo Tel : 258-21-424352 Fax : 258-21-424386 Email : ipex@teledata.cprm.net Web site : www.ipex.gov.mz/	PRV	

Name and contacts	Type	Role
Org: Instituto para o Desenvolvimento de Moçambique (IDM) Name: - Address: Av. Albert Luthuli n/o 544, Maputo Tel: 258-21-314358 Fax: Email: Web site:		
Org: Malanga Micro-Crédito () Name: Manuel Langa – Director Address: Av Samora Machel, 3 rd Floor, Flat 20, Maputo Tel: 258-21-310524 Fax: 258-21-310524 Email: Web site:	BNK	FS
Org: Maragra-Marracuene Agricola Açucareira () Name: - Address: 1020 Av. 25 de Setembro, 1 st Floor – CP 391, Maputo Tel : 258-21-313245 Fax : 258-21-313234 Email : maragra@teledata.mz Web site :	PRV	PS-P
Org: Ministério da Agricultura (MINAG) Name: Ana Mesquita – Departamento de Administração e Finanças Address: Praça dos Heróis Moçambicanos, Maputo Tel : 258-21-460081 Fax : 258-21-460187 Email : fsldp@map.gov.mz csu.pdsp@teledata.mz Web site :	GOV	RD IN
Org: Ministério do Turismo (MITUR) Name: - Address: Avenida 25 de Setembro, 1018 – CP 4101, Maputo Tel: 258-21-313755 Fax: 258-21-306212 Email: Web site: www.moztourism.gov.mz/	GOV	
Org: Ministério de Indústria e Comércio (MIC) Name: Carlos Alberto Sampaio Morgado – Minister Address: Praça 25 de Junho 8 th Floor – CP1831, Maputo Tel: 258-21-427204 Fax: 258-21-352669 Email: infomic@mic.gov.mz Web site: www.mic.gov.mz/	GOV	RU
Org: Ministério de Planificação e Desenvolvimento Rural () Name: - Address: , Tel: 258-21-495350/492705 Fax: Email: Web site:	GOV	RU
Org: Ministério das Finanças – Direcção Nacional de Plano e Orçamento (MIF – DNPO) Name: - Address: CP 272, Maputo Tel: 258-21-315000 Fax: Email: Web site: www.mozambique.mz/governo/mpf/dnpo/	GOV	
Org: Ministério das Finanças – Unidade Técnica de Restruturamento de Empresas (MIF – UTRE) Name: - Address: Prédio 33 Andares Suites 704-708 Rua da Imprensa, 7th Floor 256 – CP 272, Maputo Tel: 258-21-426515 Fax: 258-21-420137 Email: juma@utre.uem.mz utre@teledata.cprm.net Web site: www.mozambique.mz/governo/mpf/dnpo/	GOV	

Name and contacts	Type	Role
Org: Direcção Nacional de Áreas de Conservação – Ministério do Turismo (MITUR – DNAC) Name: Isabel Macie – Address: Av. 25 de Setembro 1018, CP 4101, Maputo Tel : 258-21-303633 Fax : Email : ebenc.iucn@tvcabo.co.mz Web site :	GOV	
Org: Ministério para a Coordenação da Acção Ambiental (MICOA) Name: José Guamba – Permanent Secretary Address: R. de Kassuende, 167, CP 2020, Maputo Tel : 258-21-496109 Fax : 258-21-496108 Email : j.guamba@zebra.uem.mz Web site :	GOV	
Org: Direcção Nacional de Florestas e Fauna Bravia – MINAG (DNFFB) Name: Arlito Cuco – Director Address: Praça dos Heróis Moçambicanos, 1406, Maputo Tel: 258-21-460036 Fax: 258-21-460062 Email: Web site:	GOV	
Org: Direcção Nacional de Extensã Agrária – MINAG (DNEA) Name: Albertina Alage – Chief of Department Address: Praça dos Heróis Moçambicanos, 1406, Maputo Tel : 258-21-460280 Fax : 258-21-460232 Email : aalage@map.gov.mz Web site :	GOV	
Org: Núcleo de Indústria Pesqueira de Tambara () Name: Berta Fumo – Address: CP 2776, Maputo Tel: Fax: Email: Web site:		PS-P
Org: Associação das Organizações Comunitárias (ADOC) Name: Ernesto Jaime Lopes – President Address: Av Samora Machel, 27, Nampula Tel: 258-26-213556 Fax: 258-26-216260 Email: Web site:	NGO	RU
Org: Organização para o Desenvolvimento da Zambézia (ODZ) Name: Felizardo Semente – Address: , Tel: Fax: Email: Web site:	NGO	
Org: Organização para o Desenvolvimento Socio-económico Integrado (KULIMA) Name: Domenico Luizzi – Director Address: Av Karl Marx, 1452, Maputo Tel: 258-21-430665 Fax: 258-21-321510 Email: kulima@teledata.mz Web site:	NGO	RU FS
Org: Ping Wha Agrícola Lda () Name: - Address: Av Ahmed S Touré, 2671-2° E, Maputo Tel: 258-21-426840 Fax: Email: Web site:	PRV	

Name and contacts	Type	Role
Org: Programa de Apoio aos Mercados Agrícolas (Direcção Nacional de Desenvolvimento Rural) (PAMA) Name: Rui Ribeiro – Address: n° 134 – Rua n° 3253 Bairro da da Maxaquene C, Maputo Tel : 258-21-418007 Fax : 258-21-414465 Email : rribeiro@pama.org.mz Web site :	GOV	
Org: Programa de Desenvolvimento Rural, Sofala () Name: Jean-Paul Vermeulen – Assessor Address: R Major Serpa Pinto, Prédio do Governo, 7th Floor, CP 165, Beira Tel: 258-23-323774 Fax: 258-23-325292 Email: proder@teledata.mz Web site:	REG	
Org: Progresso, Liberdade, Desenvolvimento (PROLIDE) Name: Leonardo Lorenzoni – Coordinator Address: Av Marien N'Gouabi, 10, 3 rd Floor, 2939, Maputo Tel : 258-21-321648 Fax : Email : prolide@teledata.mz Web site :	NGO	RU TR
Org: Projecto de Irrigação de Pequena Escala – Direcção Nacional de Hidráulica Agrícola (DNHA) Name: Fernanda Gomes – Coordinator Address: Rua da Resistência, 1746, Maputo Tel : 258-21-414775 Fax : 258-21-414775 Email : ffip@tvcabo.co.mz Web site :	GOV	RU
Org: Projecto Icrاف (International Centre for Research in Agroforestry) – INIA (Instituto Nacional de Investigação Agronômica) (ICRAF) Name: John Casey – Coordinator Address: Av FPLM,2698-1°, Maputo Tel : 258-21-461775 Fax : 258-21-461775 Email : ana.luisa@intra.co.mz Web site :		
Org: Sabié Sociedade Agro Alimentar () Name: - Address: Av Salvador Allende,102-1°, Maputo Tel: 258-21-314669 Fax: Email: Web site:	PRV	
Org: Salma Desenvolvimento Comunitário () Name: - Address: R Mártires Mueda,17-r/c, Nampula Tel: 258-26-216426 Fax: Email: Web site:	NGO	
Org: Sociedade Agro-Pecuária dos Libombos (SAPEL) Name: António Gomes – Director Address: R. Do Minho, 563, Matola Tel: 258-21-782298 Fax: 258-21-782298 Email: Web site:	PRV	PS-P
Org: Sociedade de Crédito de Moçambique S.A.R.L (SOCREMO) Name: Martin Roller – Manager for agriculture credits Address: Av 24 de Julho, 426, Maputo Tel: 258-21-499543 Fax: 258-21-499029 Email: scm-museu@teledata.mz Web site:	BNK	FS

Name and contacts	Type	Role
Org: Sociedade de Pesca de Gamba (GAMBEIRA) Name: - Address: Av. Tavares Almeida, 30, Maputo Tel : 321965/323524 Fax : Email : gambeira.lurdes@sortmoz.com Web site :	PRV	PS-P
Name and contacts	Type	Role
Org: Sociedade de Veterinária e Agricultura, Lda (VETAGRO) Name: José Luiz Caravela – General Manager Address: Av 25 de Setembro, 1509, 3rd floor, Maputo Tel: 258-21-430293 Fax: 258-21-431101 Email: vetagro@teledata.mz Web site:	PRV	
Name and contacts	Type	Role
Org: Sociedade para a Gestão e Desenvolvimento da Reserva do Niassa (SRN) Name: Anabela Rodrigues – Executive Director Address: Av. Mártires de Inhaminga, no. 179, 11 andar, Maputo Tel: 258-21-421495/6 Fax: 258-21-421497 Email: Web site:	NGO	
Name and contacts	Type	Role
Org: Sociedade Pecuária Chinonanquila, Lda () Name: - Address: , Tel: Fax: Email: Web site:	PRV	
Name and contacts	Type	Role
Org: Sociedade Pesqueira de Moçambique (SPM) Name: - Address: Av. OUA, 1095, Maputo Tel: 258-21-402782 Fax: Email: Web site:	PRV	
Name and contacts	Type	Role
Org: Tchuma – Cooperativa de Poupança e Crédito (Tchuma) Name: Kathryn Larcombe – Deputy Director Address: Av. Eduardo Mondlane, 1778, Maputo Tel: 258-21-314875/6 Fax: 258-21-314881 Email: kathryn.Tchuma@teledata.mz Web site:	BNK	FS
Name and contacts	Type	Role
Org: União Geral das Cooperativas Agro-Pecuárias em Maputo (UGC) Name: Prosperino Gallipoli – Address: Av. Agostinho Neto, 714, CP 4488, Maputo Tel : 258-21-430459/430229 Fax : 258-21-430459 Email : ugcapm@mail.tropical.co.mz Web site :	PRV	TR FS
Name and contacts	Type	Role
Org: União Geral das Cooperativas – Apoio ao Desenvolvimento (UGC-AD) Name: Dr. Fernandes – Executive Director Address: Av. Vladimir Lenine, no/ 2015, CP 4488, Maputo Tel: 258-21-417524/258-82-3237500 Fax: 258-21-450295 Email: Web site:	NGO	TR
Name and contacts	Type	Role
Org: União Nacional de Camponeses (UNAC) Name: Diamantino L. Nhamossa – Executive Coordinator Address: R. Valentim Sitti, no/ 39, CP 1016, Maputo Tel: 258-21-300599 Fax: 258-21-306738 Email: unacadvocacia@teledata.mz Web site:	NGO	RU

Name and contacts	Type	Role
Org: Universidade Católica – Faculdade de Agricultura de Cuamba (UCM) Name: Eurico Navaia – Director General Address: R. Do Aeroporto, CP 22, Niassa-Cuamba Tel : 258-271-62732 Fax : 258-271-62733 Email : facuamba@teledata.mz Web site : www.ucm.ac.mz/	EDU	RD IN
Org: Universidade Eduardo Mondlane – Faculdade de Agronomia (FA, UEM) Name: Almeida Siteo – Faculty Associate Address: Av Julius Nyerere, CP 257, Maputo Tel : 258-21-492176 Fax : 258-21-492176 Email : sittus@zebra.uem.mz Web site : www.uem.mz/faculdade/agronomia/index.htm	EDU	RD IN
Org: Direcção de Formação, Documentação e Transfêrencia de Tecnologia () Name: Paula Pimentel – Director Address: Av. Dos FPLM 3868, Maputo Tel: 258-21-460220 Fax: 258-21-460220 Email: Web site:		
Org: Núcleo de Estudo de Terras e Desenvolvimento – UEM (NET) Name: Arlindo Chilundo – Coordinator Address: Edifício da Faculdade de Letras, 2nd Floor, Door 322, Maputo Tel : 258-21-494743 Fax : 258-21-494743 Email : arlindo@zebra.uem.mz Web site : www.uem.mz/faculdade/letras/net/net.htm	EDU	RD IN
Org: Direcção Nacional para a Gestão Ambiental – MICOA (DNGA) Name: Sónia da Silveira – Assistant Director Address: Av. Acordos de Lusaka, 2115, Maputo Tel: 258-21-465947 Fax: 258-21-465849 Email: Web site:	GOV	
Org: Standard Bank () Name: Carlos Ramalho – Address: Pc 25 de Junho, 1, Maputo Tel: 258-21-429643 Fax: 258-21-429642 Email: carlos.ramalho@standardbank.co.mz Web site: www.standardbank.co.mz/	BNK	FS
Org: Banco Internacional de Comércio () Name: - Address: , Tel: Fax: Email: Web site: www.icbank.mz.com/	PRV	
Org: Companhia Agro Pecuária de Moçambique, Lda () Name: - Address: , Tel: Fax: Email: Web site:	PRV	

Name and contacts	Type	Role
Org: Empowering Private Enterprise in the Development of Agriculture (ACDI/VOCA – CLUSA – TechnoServe, Inc) (Emprenda) Name: - Address: , Tel: Fax: Email: Web site:		
Name and contacts	Type	Role
Org: Care () Name: - Address: Av Martires da Mueda, 596, CP 4657, Maputo Tel : 258-21-492064 Fax : Email : carem@care.org.mz Web site :		
Name and contacts	Type	Role
Org: Gabinete de Promoção ao Sector Comercial Agrário (GPSCA) Name: - Address: , Tel: Fax: Email: gpsca.ina@tvcabo.co.mz Web site:	GOV	
Name and contacts	Type	Role
Org: Direcção Nacional de Serviços Agrários – MINAG () Name: - Address: , Tel: Fax: Email: Web site:	GOV	
Name and contacts	Type	Role
Org: Direcção Nacional de Desenvolvimento Rural () Name: - Address: R 3253, 134, Bairro de Maxaquene, Maputo Tel: 258-21-418007 Fax: 258-21-414465 Email: Web site:	GOV	
Name and contacts	Type	Role
Org: Núcleo Terra (NUTE) Name: Domingos N'chumali – Address: R do Comercio, 46, Pemba Tel: 258-272-20348 Fax: 258-272-20348 Email: focade@teledata.mz Web site:	NGO	
Name and contacts	Type	Role
Org: Departamento de gestão costeira – Direcção Nacional de Gestão Ambiental (DGC – DNGA) Name: Anselmo Gaspar – Chief of Department Address: Av Acordos de Lusaka, 2115, CP 2020, Maputo Tel : 258-21-465622 Fax : 258-21-465849 Email : pgbmc1@teledata.mz Web site :	GOV	
Name and contacts	Type	Role
Org: Kwaedza Simukai () Name: Domingos Neto – Coordinator Address: Av Eduardlo Mondlane, 191, CP 103, Manica Tel : 258-251-62217 Fax : 228-251-62224 Email : kfm@teledata.mz Web site :	NGO	RD TR FS
Name and contacts	Type	Role
Org: Magarir () Name: Oliveira Mucar – Coordinator Address: R 17 de julho, 386, CP 4404, Chimoio Tel : 258-251-22747 Fax : 258-251-22488 Email : magariri@teledata.mz Web site :	NGO	RD

Name and contacts	Type	Role
Org: Fórum para a Natureza em Perigo (FNP) Name: António Reina – General Director Address: Av Amilcar Cabral 183, CP 4203, Maputo Tel : 258-21-308924 Fax : 258-21-308925 Email : fnp@fnp.org.mz Web site : www.fnp.org.mz	NGO	
Name and contacts	Type	Role
Org: Associação Progresso () Name: Elizabeth Mineiro Sequeira – Executive Director Address: Av Ahmed S Touré, 1957 CP 2223, Maputo Tel : 258-21-430486 Fax : 258-21-423140 Email : programas@progresso.co.mz Web site :	NGO	RD TR
Name and contacts	Type	Role
Org: Ministério para o Ensino Superior, Ciência e Tecnologia (MESCT) Name: - Address: Av Patrice Lumumba, 770, Maputo Tel : 258-21-352800 Fax : 258-21-352860 Email : secretariado@mesct.gov.mz Web site :	GOV	
Name and contacts	Type	Role
Org: Ministério da Mulher e Coordenação da Acção Social (MICAS) Name: - Address: R Carlos Alberto, 57, Maputo Tel : 258-21-310650 Fax : 258-21-310650 Email : dn.mulher@tvcabo.co.mz Web site :	GOV	
Name and contacts	Type	Role
Org: Instituto de Comunicação Social (ICS) Name: Sofia Ibrahim Itale – Director Address: Av Amilcar Cabral 214, CP 2546, Maputo Tel: 258-21-324216 Fax: 258-21-430951 Email: pesquisa@dpaics.uem.mz Web site:	GOV	IN RU
Name and contacts	Type	Role
Org: Gabinete de Promoção de Plantas Medicinais – Instituto Nacional de Saúde (GPPM – INS) Name: Adelaide Bela Agostinho – Coordinator Address: Av Eduardo Mondlane, 1008, 3 rd Floor, CP 264, Maputo Tel : 258-21-431103 Fax : 258-21-431103 Email : a_agostinho36@hotmail.com Web site :	GOV	RU
Name and contacts	Type	Role
Org: Departamento de Produção Vegetal – Faculdade de Engenharia Florestal (DPV – FAEF) Name: Luis Artur – Chief of the Agrarian Sociology Department Address: Av Julius Nyerere CP 257, Campus Universitario, Edificio 1, Maputo Tel: 258-21-492178 Fax: 258-21-492176 Email: Luisartur@agronomia.uem.mz Web site: www.uem.mz/faculdade/agronomia	EDU	RU RD
Name and contacts	Type	Role
Org: Unidade de Formação e Investigação em Ciências Sociais – Faculdade de Letras (UFICS) Name: Obed Baloi – Address: Av Julius Nyerere CP 257, Campus Universitario, Maputo Tel: 258-21-494744 Fax: 258-21-494744 Email: www.uem.mz/faculdade/letras/	EDU	

Name and contacts	Type	Role
Org: Grupo Mocambicano da Divida (GMD) Name: - Address: Av Olof Palme, 236 – PO Box 2223, Maputo Tel: 258-21-303868/303026 Fax: 258-21-303867 Email: Web site: www.divida.org/		

The following abbreviations are used:

Type

AS-F	Farmers' association (includes co-operatives)
AS-W	Women's association
AS-Y	Youth association
BNK	Bank or credit institution
CCI	Chamber of commerce and industry
CHU	Church-based group
EDU	Educational institution
GOV	Government department / ministry
NGO	Non-government organisation
PRV	Private enterprise, company
REG	Regional organisation, project or network
STA	Statutory body
STE	State enterprise
OTH	Other

Role

EX	Extension and outreach
IN	Information services
FS	Financial services
PP	Policy and planning
PS-E	Private sector – Exporter (fresh, frozen and dried produce)
PS-M	Private sector – Manufacturer (e.g. tannery, bottler, refiner, roaster)
PS-P	Private sector – Producer (e.g. commercial farm, fishing company)
PS-S	Private sector – Supplier (e.g. ag. Chemicals, equipment, seeds)
RD	Research and development
RG	Regulation (compliance, standards)
TR	Training (at secondary, tertiary and vocational level)
TM	Trade and marketing (include market development)
RU	Rural Development
OT	Other

III.2 Select list of key institutions

Name of institution 1:
Instituto de Investigação Agrária Moçambicano (IIAM)
Objective / mission statement:
<p>Objectives of the IIAM:</p> <ul style="list-style-type: none"> • Develop, test and disseminate technologies, services and agricultural products with a view to increasing productivity and production, improving food security and promoting agribusiness • Conduct applied research • Contribute to the conservation of biodiversity and the sustainable use of natural resources • Conduct investigations in conjunction with national and international agencies • Improve institutional capacity and performance • Strengthen the national investigation system
Field of specialisation:
<p>The IIAM areas of specialisation are scientific investigation in the agriculture, livestock, natural resources and agribusiness sectors, the provision of scientific and technical assistance and the dissemination of and training in new technologies.</p> <p>Departments within IIAM:</p> <ul style="list-style-type: none"> • Department of Animal Sciences • Department of Agronomy, Forestry & Natural Resources (Mission to develop research and provide services concerning forest and wildlife that preserves and promotes the sustainable use of these resources and that increases their productivity and improves the welfare of the population. It has a research focus that includes community based natural resource management, integrated management systems, timber and forestry exploitation & processing and other forestry product diversification • Department of Training, Documentation & Technology Transfer • Department of Planning, Administration & Finances <p>There is no specific department responsible for information technology support.</p>
Number of staff professional, clerical, technical, etc; permanent / temporary):
<ul style="list-style-type: none"> • 10 PhD holders • 46 MSc holders • 76 BSc holders
Branches, other sites:
<p>IIAM has four 'Zonal Centres' in the Centre (Sussendenga), the South (Chokwe), the North East (Nampula) and the North West (Lichinga).</p>
Annual budget:
<p>Unknown</p>
Source of funding, incl. Main donors / sponsors:
<p>State budget through PROAGRI</p>

Name of institution 1:
Instituto de Investigação Agrária Moçambicano (IIAM)
Programme / projects undertaken:
<p>Priority research areas for IIAM have been defined as:</p> <ul style="list-style-type: none"> • Technologies for arid and semi-arid zones, including systems of adapted production and the conservation and rational use of water • Food Security • Production diversification • Irrigated agriculture • Forest development, including the ecology and management of forest areas and forest zoning • Improved seeds • Livestock development
Target audience (plus number, actual or estimated):
<ul style="list-style-type: none"> • Small holders • Agribusiness operations • NGOs
Extent of interaction with CTA – Spore Magazine, SDI, QAS, DORA, seminars, consultants, publications:
<p>Spore Magazine CTA publications</p> <p>No other interaction to the knowledge of the respondents</p>
Extent of collaboration / interaction with other institutions (name, nature)
<p>Parties to the agreement are the Government of Mozambique, Agência Brasileira de Cooperação (ABC) and Empresa Brasileira de Pesquisa Agropecuária (EMBRAPA).</p> <p>The MOU describes assistance offered to Mozambique from the Government of Brazil to be realized over an 18-month period between July 2003 and December 2004. Brazil, through EMBRAPA, offers consultancies and training in a variety of topics. Projected funding of US\$613,810 is to be shared almost equally between the GoM and Brazil.</p> <p>IIAM are beneficiaries of the Strengthening Mozambique’s Capacity for Agricultural Policy Analysis, Productivity, Growth and Poverty Reduction implemented by Michigan State University and funded by USAID. This project recently held a seminar on Electronic Access to Research (Curso de Formação de Formadores –Training of Trainer Seminar), which was attended by staff from IIAM and other institutions (15 in total). This was designed to increase “Access to Global Online Research in Agriculture”.</p> <p>There are joint investigation programmes with the UEM (the Faculties of Agronomia and Veterinaria), where several of the technicians from IIAM are also part-time lecturers.</p> <p>IIAM collaborates with various NGOs (World Vision, CARE, the Foundation Against Hunger, Forum Mulher, FDC, etc) – these range from information-sharing to funding by the NGOs of field-level investigations.</p> <p>Exchange visits have taken place in the past under the auspices of the ITA (Institute for Tropical Agriculture). There are also links to ICRAF, CIAT, ICRISAT, SYMMIT and IUCN. Some of these provide financial assistance for technicians to attend international and regional seminars and conferences.</p>

Name of institution 1:
Instituto de Investigação Agrária Moçambicano (IIAM)
How information needs are currently met, and from where or by whom:
<p>The Centre for Agricultural Documentation and Information within MINAG provides access to magazines and is a source of various kinds of information on agriculture and rural development issues.</p> <p>IIAM have apparently subscribed to The Essential Electronic Agricultural Library (TEEAL) but it is not yet operational. This is a project of Cornell University's Albert R. Mann Library in cooperation with over 60 major scientific publishers, societies and index providers, and with the ongoing support of the Rockefeller Foundation. It is apparently going to provide access to information on CDs.</p> <p>IIAM's soil database contains about 40,000 points of measure on the whole territory. With this database, IIAM can provide analysis of soil potentials, monitor soil problems, and various other soil requirements. In partnership with the University of Cromwell, IIAM also developed an Automated Land Evaluation System (ALES). This expert system uses three input databases providing information on soil, crop, and meteorology that calculates the suitability of land to support specific agricultural activities. The system is not connected yet to a GIS for mapping of the results of analyses, but IIAM plans to add this facility.</p> <p>The main library (the old INIA library) at IIAM has a software cataloguing system (WIN ISIS) but only for most recent acquisitions (the computer on which this is installed is presently broken). The three other libraries in the other departments do not have this system and are not linked in any way. Technicians can borrow some books, but not all. There are no photocopying or scanning facilities in the library. There is no system through which technicians can register their interests or suggest relevant subscriptions or information sources to the library staff, who appear to be solely responsible for identifying sources of information. There is no or very limited budget for acquisitions – most books come from donations from organisations such as FAO.</p> <p>About 50% of the technicians within the IIAM have access to the internet via their desktop computers. There is no LAN in operation but plans to establish one. There is no specific IIAM website but some information and reports are made available through the Ministry of Science & Technology's web portal.</p> <p>Attendance at conferences provides information and networking opportunities but these are not sufficiently shared throughout the organisation.</p>
Main information needs not satisfied:
<p>Main information needs for programme:</p> <ul style="list-style-type: none"> • Technical information on agricultural techniques in rest of tropics <p>Major unmet needs:</p> <ul style="list-style-type: none"> • Up to date information in books • Technical information on agricultural techniques in rest of tropics <p>Plans for the future:</p> <ul style="list-style-type: none"> • Decentralisation of services to the Zonal Centres • Establishment of LAN within central IIAM • Establishment of databases • System for technicians to register interests with library • Production of Scientific and Technical magazines • Development of audio visual materials <p>Resource needs:</p>

Name of institution 1:
Instituto de Investigação Agrária Moçambicano (IIAM)
<ul style="list-style-type: none"> • Computers and network infrastructure • Licensed publishing software for production of publications • Photocopying and scanning equipment • Videoconferencing equipment <p>Training needs:</p> <ul style="list-style-type: none"> • Funding for long-term higher education opportunities • Training in communication techniques and strategies • Journalism/effective writing to produce good magazines and leaflets. • Librarians, in organisation of books and journals
Main problems faced in terms of information and communication management:
<ul style="list-style-type: none"> • Lack of an integrated strategy for information sharing and dissemination • Lack of capacity within in-house library services to search through holdings • Lack of capacity within in-house library services to copy or scan information from various sources • Little sharing of important information
Why institution selected as a key:
<p>The mission of IIAM is to contribute towards increased agricultural production and productivity through technological development, information dissemination and sustainable management of natural resources. The Centro de Formação Agrária and the Centro de Documentação e Informação Agrícola have recently been incorporated into the newly established IIAM. Other former institutions that are now part of IIAM are the Centro de Experimentação Florestal (CEF – Centre for Forestry Experimentation) and the Instituto Nacional de Investigação Veterinária (INIV – Veterinary Research Institute)</p>

Name of institution 2:										
Instituto de Desenvolvimento da Pesca de Pequena Escala (IDPPE), Maputo										
Objective / mission statement:										
<p>Objectives/activities of the IDPPE are to:</p> <ul style="list-style-type: none"> • Conduct investigations, diagnostic studies and other forms of applied research related to socio-economic issues with a view to establishing sustainable policies and strategies related to artesanal fisheries • Implement extension activities that consist of the systematic collection of information, the dissemination of information and other forms of capacity-building, with a focus on leadership skills, associativism and organisational support. • Conduct investigations and disseminate information related to fishing practices and appropriate forms of conserving artesanal fish production • Conduct investigations and disseminate information related to new or existing fishing techniques • Identify, implement and evaluate programmes and development projects in the artesanal fisheries sector • Design information systems to manage statistical data on the artesanal fisheries sector 										
Field of specialisation:										
<p>There 8 Departments within IDPPE, including:</p> <ul style="list-style-type: none"> • Department of Planning & Statistics • Documentation & Information Unit <p>The Documentation & Information Unit has a particular brief regarding the management of information. The Department of Planning & Statistics has a fairly solid institutional base with 6 staff, 3 of whom who are recently recruited and who have skills in the area, 3 of whom have long experience in the sector. Both departaments lack particular skills in information management and communication.</p>										
Number of staff professional, clerical, technical, etc; permanent / temporary):										
<table> <tr> <td>Total</td> <td>314</td> </tr> <tr> <td>Professional</td> <td>31 (university level);</td> </tr> <tr> <td>Clerical</td> <td>30</td> </tr> <tr> <td>Technical</td> <td>92</td> </tr> <tr> <td>Support staff</td> <td>162</td> </tr> </table>	Total	314	Professional	31 (university level);	Clerical	30	Technical	92	Support staff	162
Total	314									
Professional	31 (university level);									
Clerical	30									
Technical	92									
Support staff	162									
Branches, other sites:										
Delegations in all coastal provinces (except Gaza) and in Metangula (Lago Niassa) and Tete (Cahora Bassa).										
Annual budget:										
<p>2003: 16.9 mil milhões de Meticais 2004: 18.8 mil milhões de Meticais 2205: 23.5 mil milhões de meticais</p>										
Source of funding, incl. Main donors / sponsors:										
Gov of Mozambique funds and external funds (IFAD, Norway, ADB, BSF)										

Name of institution 2:
Instituto de Desenvolvimento da Pesca de Pequena Escala (IDPPE), Maputo
Programme / projects undertaken:
<p>Particular projects within IDPPE:</p> <ul style="list-style-type: none"> • Pesca Artesanal em Nampula (PPAN) 1995 – 2002 • Pesca Artesanal no Banco De Sofala (PPABAS) 2002 – 2008 • Pesca Artesanal a Norte de Nampula e Província de Cabo Delgado 2003 – 2009 • Desenvolvimento da Pesca Artesanal em Palma 1998 – 2001 • Promoção Económica da Pesca Artesanal em Moçambique 1998 – 2002 • Apoio a Pesca Artesanal no Âmbito da Emergência 2000 – 2002 <p>Main ongoing activities of the IDPPE include:</p> <ul style="list-style-type: none"> • Studies and surveys, of a technological character, relating to fisheries and fish processing • Collection and analysis of information concerning costs and access to fishing inputs, the processing and commercialisation of fish products • Technical assistance to fishing communities and fish product processors
Target audience (plus number, actual or estimated):
Artesanal fishing communities (100,000 fishermen)
Extent of interaction with CTA – Spore Magazine, SDI, QAS, DORA, seminars, consultants, publications:
Some staff at the IDPPE are aware of the CTA as an institution, but knowledge of the services provided was limited to the <i>Esporo</i> magazine, received by the Documentation Centre within IDPPE. Respondents stated that in the past there may have been invitations to CTA-organised seminars but that they were not personally aware of these.
Extent of collaboration / interaction with other institutions (name, nature)
<p>Close institutional links exist with the IIP (Instituto de Investigação Pesqueiro – see below), the Fundo Fomento Pesqueiro (Fisheries Development Fund – FFP) and various directorates of the Ministry of Fisheries (particularly the Directorate of Fisheries Economy through the Department of Planning and Statistics, the Directorate of Fisheries Administration and the Department of Aquaculture).</p> <p>IDPPE collaborates with the Escola de Pesca (Fisheries School) and is presently attempting to elaborate jointly a module-based course to complement the existing 3 year full time training in Biology and Fisheries Extension (a diploma course) that is provided. This would allow extension workers from IDPPE to benefit from training without having to be absent from their work for extended periods.</p> <p>There is significant collaboration with a range of other State institutions as a result of implementation of the PPABAS and PPANNCD projects. These include the Ministries of Public Works (for water provision and tertiary roads), Health (for health posts within fishing communities) and Education (schools), as well as some NGO's for microfinance and associativism purposes.</p> <p>Presently the IDPPE are having informal but practically-oriented discussions with the SIMA (Sistema de Informação dos Mercados Agrícolas – see below) regarding the establishment of a similar information service in respect to the fisheries sector – this has a working title of Sistema de Informação dos Mercados Pesqueiros (SIMP).</p> <p>Other state institutions with which IDPPE collaborate include:</p> <ul style="list-style-type: none"> • Instituto Nacional de Inspeção Pesqueiro (National Fisheries Inspectorate)

Name of institution 2:

Instituto de Desenvolvimento da Pesca de Pequena Escala (IDPPE), Maputo

- Instituto Nacional de Estatística

Collaboration with national NGOs includes

- ADEM – Agencia de Desenvolvimento de Manica
- KULIMA
- OLIPA
- OPHAVELA
- TRIMODER

International linkages exist with:

- The World Fish Centre (research centre, part of CGIAR)
- International Collective in Support of Fishworkers (ICSF)
- The Marine Institute at Memorial University, Canada (capacity-building and support, particularly in curriculum development for transmitting messages to fishing communities)
- Food & Agriculture Organisation (FAO)
- Overseas Fishery Cooperation Foundation (OFCF)
- Italy (financial assistance, via FAO)
- Thailand (basic technicians given opportunities to travel and learn from Thai communities – running over past 7/8 years)
- Angola (courtesy visits)
- Japan (a volunteer programme to train nationals in ICTs – not in implementation, contacts and discussions in place)
- AFVP (a volunteer programme assisted by the French government. They presently have a volunteer placement within IDPPE with a specific focus on strengthening information management capacities)

Name of institution 2:
Instituto de Desenvolvimento da Pesca de Pequena Escala (IDPPE), Maputo
How information needs are currently met, and from where or by whom:
<p>International: organisations with which the IDPPE collaborates (see above) plus:</p> <ul style="list-style-type: none"> • Marketing Information and Technical Advisory Services for Fish and Fishery Products in Southern Africa (INFOSA – the SADC regional office of INFOPECHE. INFOSA has its offices in Windhoek, Namibia, and serves all of the 14 SADC countries) • International Collective in Support of Fishworkers (ICSF) <p>National:</p> <ul style="list-style-type: none"> • SIMA (see below – Monografia de Estatísticas) • INE • Banco de Moçambique • Centro de Formacao e Treino (Ministerio das Pescas) • BIP (Revistas, folhetos , brochuras) • Arquivo historico (Monografias) • Centro de documentacao (UEM) • MICOA(revistas sobre aspectos de ambiente) • MAGRI (Folha verde, catalogos); SIMA (see below) • PNUD <p>The IDPPE conducts its own applied research, where the principal focus is on baseline and other surveys that concern commercialisation and distribution of fishing equipment and inputs, availability of credit, conflicts, etc.</p> <p>The IDPPE maintain databases (in ACCESS) on the</p> <ul style="list-style-type: none"> • Number of fishing families in various centres, number of boats and associations in the artesanal sector (in ACCESS) • Prices and availability of artesanal fishery inputs (in ACCESS) • Socio-economic status within the sector (in SQL) <p>There is a LAN within the Institute at the Maputo offices, connecting 55 computers and further LANs within the provincial delegations (43 computers), although these are not linked. The library within the Documentation & Information Unit is reasonably well-organised and has software for cataloguing library holdings.</p> <p>Information is also obtained when staff from IDPPE attends regional and international seminars and conferences but there is no systematic way of feeding this information back into the organisation.</p>

Name of institution 2:
Instituto de Desenvolvimento da Pesca de Pequena Escala (IDPPE), Maputo
Main information needs not satisfied:
<p>Main information needs for programme:</p> <ul style="list-style-type: none"> • Technical information regarding similar work that is being done <p>Major unmet needs/areas of improvement:</p> <ul style="list-style-type: none"> • Capacity to keep website maintained – time and focus • More systematised information in the library (for material produced internally) <p>Plans for the future:</p> <ul style="list-style-type: none"> • Production of audio-visual material • Improved methods of data collection, handling, management and dissemination <p>Resource needs:</p> <ul style="list-style-type: none"> • More skilled staff though training (on job or other models) <p>Training needs:</p> <ul style="list-style-type: none"> • Information management and communication skills need building within the Documentation and Information Unit • Skills in relation to conceptualisation and effective maintenance of websites • Planning, Monitoring and Evaluation of activities
Main problems faced in terms of information and communication management:
<p>Lots of information exists within the Institute but requires better systematisation and analysis and needs to be published and distributed in formats that are more accessible to the target groups.</p> <p>Institutional coordination with, for example, the IIP (in order to join technical and social data regarding the sector) needs improvement.</p> <p>Sharing of information more efficiently and effectively with provincial delegations, such that they are 'within a network', has been a problem.</p>
Why institution selected as a key:
<p>The IDPPE is involved in a national programme to assist small-scale fishing communities, assisting with their involvement in co-management institutions related to coastal management and the introduction of more sustainable practises. They manage databases related to fishing communities and capacities.</p>

Name of institution 3:
União Nacional de Camponeses (UNAC), Maputo
Objective / mission statement:
<p>UNAC was founded as a social movement, but for different contextual reasons it has lost this essence, becoming more of an NGO than a movement, whose mission is to defend the rights and interests of small farmers. The stated mission is:</p> <p>“To struggle for an increased protagonism of small farmers (women, men, and youth) in the construction of a society which is more just, prosperous and united”</p> <p>Objectives are:</p> <ul style="list-style-type: none"> • To increase the quality and quantity of self-organization of small farmers (women, men and youth) in order to ensure the dynamic empowerment of the community • To intensify actions that contribute to the food sovereignty of small farmer families • To be an increasingly representative and audible voice to defend the interests of small farmers in order to achieve sustainable development. • To increase its capacity as a movement to respond positively to the challenges of the grassroots
Field of specialisation:
<p>During the nine years of its existence UNAC has promoted:</p> <ul style="list-style-type: none"> • rural associativism • technical and administrative training • the conceptualisation and implementation of development projects • actions toward the mitigation of emergency situations. <p>UNAC provided a valuable contribution to the formulation of the current Land Law, and was recognized for its transparency and seriousness by the State, international and national partners.</p> <p>Departments within UNAC:</p> <ul style="list-style-type: none"> • Department of Administration, Logistics and Finance • Department of Facilitation & Accompaniment (The objective of this department is to facilitate, accompany and advise grassroots groups, to identify problems, objectives, challenges and solutions. The department is also responsible for the popularisation of the movement) • Department of Rural Development (This department is responsible for systemizing the information collected by the Facilitation and Accompaniment team and for seeking solutions to problems and challenges identified by the grassroots members. Its main responsibilities include: the accompaniment of local development programmes and external projects, coordination and collaboration with State extension services, exchange of experience at different levels; training, commercialisation, agrarian and environmental education, conservation and sustainable use of natural resources. • Department of Cooperation & Communication (This department is responsible for building national and international alliances, identifying advocacy issues, promoting necessary and pertinent lobby activities and proposing social and economic policies and legislation that accommodate small farmers. The department is also responsible for promoting communication between the members, and maintains the database of members’ information.
Number of staff professional, clerical, technical, etc; permanent / temporary):
<p>50 total staff (5 university level education, majority of rest classed as ‘tecnico medios’)</p> <p>25 staff are ‘facilitators’ – mobile UNAC employees who work in different rural areas.</p>

Name of institution 3:
União Nacional de Camponeses (UNAC), Maputo
Branches, other sites:
Members throughout the country
Annual budget:
Approximately USD\$ 800,000 per year
Source of funding, incl. Main donors / sponsors:
<ul style="list-style-type: none"> • Ford Foundation • Cooperção Catalan • Cooperção Espanhol • Various OXFAMs • DfID (funds via CAFOD/War on Want) • Membership fees (small percentage of budget)
Programme / projects undertaken:
<ul style="list-style-type: none"> • Dissemination of the most important and pertinent laws such as the Land Law, and the Forestry and Wildlife Law • Identification of local economic development opportunities for members • Lobbying and advocacy, including publication of quarterly bulletin
Target audience (plus number, actual or estimated):
Peasant and small-producer associations – formal membership in 2000: 65,000 (needs updating)
Extent of interaction with CTA – Spore Magazine, SDI, QAS, DORA, seminars, consultants, publications:
<p>Spore Magazine</p> <p>Respondent was due to travel to Brussels in May 2006 to attend seminar organised by CTA. Invitations arrive for various events but the problem of language is sometimes a restraint.</p>
Extent of collaboration / interaction with other institutions (name, nature)
<p>UNAC is currently involved in projects with PALOPS (Organisation of Portuguese Speaking Countries), and at international level in general through Via Campesina (UNAC is focal point in Africa).</p> <p>AMCS, MULEIDE, AMMCJ – collaboration and assistance in developing gender strategies (NB most actual members of UNAC are women)</p> <p>Membership of LINK</p> <p>Working links to ORAM, KULIMA, ROSA, ABIODES – attempts to avoid competition for funding, etc.</p>

Name of institution 3:
União Nacional de Camponeses (UNAC), Maputo
How information needs are currently met, and from where or by whom:
<p>Informal and international links providing information on policies, bilateral agreements – e.g. CAFOD Policy Unit, Food First, Bank Information Centre.</p> <p>Exchange visits and information on how to organise associations, run campaigns, etc, from Movimento Sem Terra (Brazilian Landless Peoples Organisation).</p> <p>Information on low-cost agricultural techniques from ANAP, development of organic pesticides and insecticides, etc (Cuban peasant organisation).</p> <p>Information regarding agricultural prices through subscription to Quente-Quente, produced by SIMA</p> <p>Information on approaches to HIV/SIDA issues from MONASU.</p> <p>Exchange visits organised between members.</p>
Main information needs not satisfied:
<p>Main information needs for programme:</p> <ul style="list-style-type: none"> • government policy – PRSP, PROAGRI, etc • how to improve productivity and capacity • where to source cheapest inputs – seeds, fertilizer • improving access to markets <p>Major unmet needs:</p> <ul style="list-style-type: none"> • Broader internet access for members • Policy information regarding adult education <p>Plans for the future:</p> <ul style="list-style-type: none"> • UNAC began a process of self evaluation in 2000, involving several studies, seminars and the development of a proposal for a strategic plan covering the period 2003 – 2008 – this highlights needs for strengthening institutional capacity • Updating of membership database • Use of radio <p>Resource needs:</p> <ul style="list-style-type: none"> • Infrastructure for broader internet access for members • Establishment of a well-informed and well-linked Policy Unit • Systems for transmitting information in effective ways to low literacy membership and target groups <p>Training needs:</p> <ul style="list-style-type: none"> • developing a capacity to interpret policy documents, implications of policy developments • how to produce simplified documentation – teaching and education initiatives • production of audio visual materials

Name of institution 3:
União Nacional de Camponeses (UNAC), Maputo
Main problems faced in terms of information and communication management:
<ul style="list-style-type: none"> • Weak links between UNAC at a central level and the grassroots associations; • The need to identify national strategies that may assist in resolving small farmers' problems, beyond the occasional projects which are limited in their impact; • Development of stronger links between farmers at village level and international and national level advocacy interventions;
Why institution selected as a key:
<p>UNAC is the closest that there is for a national structure for farmer associations. Although it is a umbrella organization of peasant associations operating at national level, its membership is limited mainly to the south. It is, however, a representative body with considerable reach and has vastly improved its impact in recent years and developed a stronger strategic direction. It has strong international links.</p>

Name of institution 4:
Associação Rural de Ajuda Mútua (ORAM), Maputo
Objective / mission statement:
<p>Mission: To defend the rights and interests of farmers, contributing to community development and securing their ownership and sustainable use of land and natural resources</p> <p>Objective: To strengthen the position of farmers (including community associations, CBOs, and unions) and their capacity to promote strategies for the ownership and sustainable use of land and natural resources</p>
Field of specialisation:
<ul style="list-style-type: none"> • Dissemination of the Land and the Forestry and Wildlife Legislations • Legalising land ownership of communities and their associations • Lobbying and advocacy • Resolution, management and mediation of land conflicts • Women's access to land and natural resources
Number of staff professional, clerical, technical, etc; permanent / temporary):
<p>ORAM has a total number of 139 workers, of which 95 are men and 44 are women.</p> <p>At the headquarters there are: 1 professional staff, 4 technical staff and 3 clerical staff. Specialised skills in agronomy, accountancy and philosophy</p>
Branches, other sites:
<p>Provincial delegations, with a level of autonomy, in:</p> <ul style="list-style-type: none"> • Sofala • Manica • Nampula • Zambézia • Zona Sul (Gaza, Inhambane, Maputo)
Annual budget:
2005 – USD\$ 2,168,923.52
Source of funding, incl. Main donors / sponsors:
<ul style="list-style-type: none"> • NOVIB • CAID • ERPB/HIVOS • IUCN/HIVOS • EED • PPM • GTZ • Ford Foundation • DED • PLN • UEM • DIAKONIA • European Union

Name of institution 4:
Associação Rural de Ajuda Mútua (ORAM), Maputo
<ul style="list-style-type: none"> • Oxfam • KIA • PASCOM • Action Aid • FAO • CNCS • ESSOR, • HILSVERK-AUSTRIA, • APN • Helvetas
Programme / projects undertaken:
<p>Consolidation and gradual expansion of the land and natural resources programme (Farmers, communities, government bodies and schools). This included several activities, such as:</p> <ul style="list-style-type: none"> • Dissemination of the land and forestry and wildlife legislations • Legalising community land and their associations • Lobbying and advocacy • Management, mediation and resolution of land conflicts • Women and their access to land and natural resources <p>Sustainable development of communities and their associations (Community organizations and associations). Activities within this programme included:</p> <ul style="list-style-type: none"> • Credit and the construction of basic infrastructure • Planning and extension of the agriculture, cattle, wildlife and forestry sectors • Consolidation of existing CBOs and the development and registration of new organisations <p>Organisational development (ORAM staff), including:</p> <ul style="list-style-type: none"> • Capacity building of internal staff • Institution equipment • Institutional reforms <p>From 2002 to 2005 616,431 farmers had secure access to land and natural resources; 127 rural communities were delimited; 2,991,859.98 hectares of land were secured to communities; 244,384 people received messages about HIV/Aids, land rights and natural resources; 8 community radio stations disseminated information about forest resources; 49 land conflicts were resolved; 65 farmer associations were legalised; 14 projects on community development were implemented.</p>
Target audience (plus number, actual or estimated):
Mainly farmers, but also community associations (including women and youth), government and civil society
Extent of interaction with CTA – Spore Magazine, SDI, QAS, DORA, seminars, consultants, publications:
None

Name of institution 4:
Associação Rural de Ajuda Mútua (ORAM), Maputo
Extent of collaboration / interaction with other institutions (name, nature)
<p>ORAM has joint projects UNAC, FDC, Christian Aid and Action Aid, NET and AMRU. They share information and exchange experiences with both UNAC and FDC.</p> <p>Fórum Mulher, Link, G20, Grupo Moçambicano da Dívida and Kulima are all ORAM's members.</p> <p>ORAM also works in collaboration with both CORN (Community Organization Regional Network) and Zero (Regional Environment Organisation)</p>
How information needs are currently met, and from where or by whom:
<p>Regional: CORN (Community Organization Regional Network); Zero (Regional Environment Organisation)</p> <p>National: NET (Núcleo de Estudos de Terra e Desenvolvimento) and AMRU (Associação da Mulher Rural), Fórum Mulher, FDC, Grupo Moçambicano da Dívida, Link, G20, Kulima, UNAC, ROSA</p> <p>International: Action Aid</p> <p>ORAM used to have a communication department and a communication officer. Now this job falls within the ambit of the Planning, Monitoring and Evaluation officer, as they lack a specific department for the management of information.</p> <p>The headquarters are responsible for the management of ORAM's information, which is discussed at national level and then sent to the provincial delegations. The programme officer at provincial level is then in charge of planning, designing and monitoring the information to be sent out to farmers and communities. This is done by a motivator, through simplified brochures, and/or community radios.</p> <p>ORAM has initiated a programme to build up a data bank and want to build up a library and a website.</p> <p>ORAM produces a quarterly bulletin</p> <p>Headquarters with internal network, computers and the internet widely used. Communication with provincial groups is mainly by telephone, as only the director of each province has access to email. GIS and conference calls are not used.</p> <p>At the provincial level they use community radios and multimedia centres (in Nampula and Zambézia), simplified brochures and guidelines to disseminate information. They also have motivators and field workers to disseminate information at provincial level, who receive subsidies to use cell phones.</p> <p>ORAM seem to have quite a lot of information (both digital and hardcopies) but have no one in charge of information management. A library and a website could improve the current situation. The development of a website could potentially improve the dissemination of ORAM's work to the general public and to policy decision makers.</p> <p>ORAM doesn't have a lobby official.</p> <p>Between 2002 and 2005 they only had 4 meetings for the exchange of information between the different delegations</p>

Name of institution 4:
Associação Rural de Ajuda Mútua (ORAM), Maputo
Main information needs not satisfied:
<p>Main information needs for programme:</p> <ul style="list-style-type: none"> • Capacity building of ORAM's staff in several fields including languages (many of the information that reaches ORAM is in English and therefore not used). • Capacity to collect information from abroad (a great amount of information about Mozambique comes from outside the country) and improve the availability of information in the country. • To better share information with its partners, and receive bulletins. ORAM has subscriptions with Link, Fonza and G20, and receive information via fax. <p>Major unmet needs:</p> <ul style="list-style-type: none"> • N/A <p>Plans for the future:</p> <ul style="list-style-type: none"> • ORAM intends to build up a website and a library. • Would like to improve email access to all ORAM's staff (including the provincial staff), but not sure about costs and how to actually implement the use of emails. <p>The main areas targeted for development include:</p> <ul style="list-style-type: none"> • secure rights to use land through the delimitation of communities and demarcation of associations; Establishment of community concession areas in partnership with other development institutions for forest areas; • development of a sustainable use of land and natural resources; • encourage the participation of women in decision making; • disseminate information and build capacity at community level regarding the combat and prevention of HIV/Aids; • intensify education activities in rural communities in collaboration with government and private institutions in order to improve the implementation of the land and natural resources legislation; • to form and strengthen farmers associations; lobbying and advocating the land and natural resources legislation and ORAM's participation in civil society forums; • to strengthen and contribute to the autonomy of rural communities so that they take part in district planning; • to create a rural farmer's movement in order for them to participate in the country's development; • to develop a Rural Bank <p>Resource needs:</p> <ul style="list-style-type: none"> • N/A <p>Training needs:</p> <ul style="list-style-type: none"> • Capacity building of ORAM's staff • Capacity to do research and collect information from outside Mozambique • To make better use of the information that is delivered by its partner organisations

Name of institution 4:
Associação Rural de Ajuda Mútua (ORAM), Maputo
Main problems faced in terms of information and communication management:
<ul style="list-style-type: none"> • Insufficient institutional management capacity • Dependency on external support • Lack of clarification of the actual roles of headquarters and provincial delegations • Lack of an institutional policy for the sustainable use of land and natural resources • Weak internal communication system • Weak capacity in certain areas of work • Weak technology • Low exchange of information and methods used between the different delegations <p>Most of the information about Mozambique (signing of agreements, agriculture related I, etc) is very difficult to acquire in the country, ad this usually comes from outside sources.</p> <p>A lot of information ORAM receives is in English, and therefore difficult to use.</p>
Why institution selected as a key:
<p>ORAM is a national NGO, with 5 provincial delegations. Although its initial focus has been on assisting community groups to delimit and register land rights, they are increasingly providing follow-on support to the communities and to producer associations. Nationally they are one of the organisations most directly linked to grass-roots organisations of farmers. They are important players in national policy development processes and have strong institutional links with a range of other stakeholders.</p>

Name of institution 5:						
Gabinete de Promoção do Sector Comercial Agrário (GPSCA), soon to become the Centro de Promoção da Agricultura (CEPAGRI), Ministério da Agricultura, Maputo						
Objective / mission statement:						
<p>The principal role of the GPSCA is the promotion of a conducive environment for development of the commercial agricultural sector, largely through the furnishing of analyses and information necessary</p> <p>It has as its primary objectives:</p> <ul style="list-style-type: none"> • The attraction of new private investment for the commercial agricultural sector • The identification of and promotion of new opportunities for agribusiness • Assistance in the implementation of projects • Linkages and coordination with other state institutions • Contribute to national entrepreneurial development in the agriculture sector • Promotion of partnerships between the national business sector and foreign investors • Encourage partnership arrangements between the family sector and the commercial sector <p>The Gabinete presently has a statistical and policy mandate regarding the sugar sector only; this involves the collection, preparation and dissemination of information regarding sugar production. However, this will be broadened on the statutory establishment of the Centro de Promoção da Agricultura, to cover other high-value sectors such as vegetables, poultry, rice, etc. (accepted by Cabinet in April, 2006)</p>						
Field of specialisation:						
<p>Departments within the GPSCA:</p> <p>Specialised skill areas: Economic analysis, agribusiness</p>						
Number of staff professional, clerical, technical, etc; permanent / temporary):						
<ul style="list-style-type: none"> • Senior Economists: 3 • Agronomy Technicians: 3 • Chemical Engineer: 1 • Junior Economists: 4 • Information Technician: 1 • On contract: 7 (6 economists and 1 information technician) 						
Branches, other sites:						
None						
Annual budget:						
€2,300,000						
Source of funding, incl. Main donors / sponsors:						
<table> <tr> <td>Cooperação Italiana</td> <td>From the start</td> </tr> <tr> <td>European Union</td> <td>Recent support for agribusiness and provincial outsourcing</td> </tr> <tr> <td>Mozambican state</td> <td>PROAGRI</td> </tr> </table>	Cooperação Italiana	From the start	European Union	Recent support for agribusiness and provincial outsourcing	Mozambican state	PROAGRI
Cooperação Italiana	From the start					
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Name of institution 5:
Gabinete de Promoção do Sector Comercial Agrário (GPSCA), soon to become the Centro de Promoção da Agricultura (CEPAGRI), Ministério da Agricultura, Maputo
Programme / projects undertaken:
<ul style="list-style-type: none"> • Promotion of common methods of analysis • Identifying needs for Phytosanitary supervision capacity within MINAG; • Commodity Aid Programme, financed by Italian Government – MZM 17,554 millions worth of equipment delivered to private sector operators; • Design of credit line to agriculture, PRES P, (47 loans, MZM 59,867 millions); • Design and operationalisation of Risk Capital for Agribusiness Initiatives (CRIA); • ASPS/ADIPSA – part of Coordination Committee of DANIDA programme to support the private sector in agriculture • Guarantee Fund for rice crop inputs <p>Provincial Outsourcing: a component of the multi-year food security programme financed by the EU. Has specific objectives:</p> <ul style="list-style-type: none"> • Consolidate and strengthen food security interventions through geographical expansion of present activities • Support to agro-processing initiatives • Support to public sector at provincial level in supervising outsourced contracts <p>The GPSCA is also involved in many activities related to the formulation and evaluation of policy and strategy and negotiation of trade agreements.</p>
Target audience (plus number, actual or estimated):
<ul style="list-style-type: none"> • Government policy makers • Members of industry
Extent of interaction with CTA – Spore Magazine, SDI, QAS, DORA, seminars, consultants, publications:
Spore Magazine in the past, only in English
Extent of collaboration / interaction with other institutions (name, nature)
<ul style="list-style-type: none"> • Overseas Development Institute (ODI) – provides a Masters economics student on placement each year to assist with programmes of monitoring regional and international prices. • Confederation of Mozambican Business Associations (CTA) – Monitoring of the implementation of the action plans jointly agreed between government and the CTA • Coordination (Working) Groups have been formed to focus on the following issue areas: Vegetables; Rice; Sugar Smuggling; EMTF; Mandioca; Biofuels.
How information needs are currently met, and from where or by whom:
<p>The main challenge for the Gabinete is identifying the most appropriate collection points for the information that they need on the various sectors, particularly the local market information. Presently this is easy because sugar producers are limited to 4 large agribusiness operations but on the expansion of their mandate they will be faced with more challenging sectors, such as vegetables and tomatoes. Presently they have staff who visit the Maputo markets on a weekly basis (outside of Maputo, this task falls to SIMA)</p> <p>Regional and international markets and prices are monitored; this is usually done by the Masters student from ODI, an annual placement scheme that has been operating for the last three years.</p>

Name of institution 5:

Gabinete de Promoção do Sector Comercial Agrário (GPSCA), soon to become the Centro de Promoção da Agricultura (CEPAGRI), Ministério da Agricultura, Maputo

The GPSCA has designed and developed a website (not yet on-line until the new Centre is approved). This will be a portal providing access to some of their databases; it may be run on a subscription basis after an initial free trial period, in order to obtain some cost recovery.

The GPSCA provides various information services, intended to feed into decision-making within the private and public sectors (policy-makers). It presently or intends to collect, analyse and provide statistics on sugar, rice, soya, vegetable, markets, investments and costs. Present focus is on sugar, for which quarterly reports are produced.

It requires information on the agro-ecological aptitude of areas for particular crops and on legislation relevant to investment. There is also a data bank on assistance to the private sector.

The GPSCA has a "Help Desk" to channel information to investors.

It has also financed 7 dissemination programmes about agribusiness best practise on the television – "Pequenos Grandes Negócios"

Main information needs not satisfied:

Main information needs for programme:

- Prices, costs, production levels at local, regional and international markets
- Policy information

Major unmet needs:

- Data in common formats

Plans for the future:

- Em pipeline o Estudo sobre o Agronegócio em Moçambique, para organizar a base de dados do sector
- Launch the website
- Consolidate and develop the technical and operational capacity of the institution
- Implement action plans and priority interventions contained within the sector studies and operationalise the respective instruments – e.g. re rice, vegetables, sugar
- Conceptualise and implement programmes and instruments of direct assistance to the agricultural business sector – risk capital, credit lines, guarantee funds, agricultural insurance and technical assistance

Resource needs:

- Generally not a problem, lots of assistance available

Training needs:

- Full time Economists needed

Main problems faced in terms of information and communication management:

According to the Director, working with data regarding production figures is always a problem in Mozambique because of (usually) deliberate under-reporting in order to avoid tax implications. In a general sense, access to local information is a problem.

There is also a general problem with receiving data from the provinces regarding production levels – each province has different reporting standards and formats.

Name of institution 5:
Gabinete de Promoção do Sector Comercial Agrário (GPSCA), soon to become the Centro de Promoção da Agricultura (CEPAGRI), Ministério da Agricultura, Maputo
Why institution selected as a key:
The Unit plays a key policy role within the MINAG and works in close collaboration with the Directorate of Economics. It has a focus on commercial agriculture, but not necessarily only large scale. It conducts and commissions research and is responsible for disseminating information to the commercial agriculture sector.

Name of institution 6:
Instituto Nacional de Investigação Pesqueira (IIP), Maputo
Objective / mission statement:
IIP is the main furnisher of information relating to the state of marine and fish resources in the country. Information is made available to policy-makers in government and to major players in the industry, including artesanal fishers.
Field of specialisation:
<ul style="list-style-type: none"> • Provision of Information on Fisheries • Policy advice to Government • Resource Use Monitoring and feedback to industry <p>Departments within IIP:</p> <ul style="list-style-type: none"> • Department of Assessment of Resources Available to Industrial Fishing Sector • Department of Assessment of Resources Available to Artesanal Fishing Sector • Department of Aquatic Environment • Department of Aquaculture • Department of Information & Documentation • Department of Administration & Finance • Human Resources Section • Documentation Section <p>The Department of Information & Documentation is responsible for information management. The IIP maintains a library with books and periodicals. The library houses two databases maintained with Cardbox software: a General Catalogue, with bibliographic data on all the library's holdings and Mozfish, a database of all the documents relating to fish in Mozambique.</p> <p>IIP also maintains a special collection of "Theses, Dissertations and Placement Reports" which numbered 40 in 2003. The library is mostly used by IIP technicians; as well as being able to borrow at any time, they are also alerted to relevant acquisitions through a system of Selective Dissemination of Information, which is based on a user profile. A small library journal is published monthly.</p>
Number of staff professional, clerical, technical, etc; permanent / temporary):
<p>Total Staff: 119</p> <p>Professional Staff: 34 (including 2 Phd & 5 MSc holders)</p> <p>Technical Staff: 25</p> <p>Clerical/Other Staff: 60</p> <p>28% of staff is women.</p>
Branches, other sites:
Delegations in Sofala, Zambézia, Inhambane, Nampula, Tete and Niassa. Some of these delegations are located in coastal districts rather than the provincial capital, making communications a challenge in some cases.
Annual budget:
Annual budget in 2003 approximately USD\$ 300,000 70% of this goes towards staff salaries, 25% on goods and services

Name of institution 6:
Instituto Nacional de Investigação Pesqueira (IIP), Maputo
Source of funding, incl. Main donors / sponsors:
<p>2003 figures show that funding sources were as follows:</p> <p>State budget - 40% of total budget NORAD - 34% SWIOFP - 9% CDE - 8% IFAD - 6% PEPA - 3%</p> <p>Main sponsors in 2005/6 are NORAD, IFAD, the African Development Bank (via IDPPE) and the Japanese Government (who have provided a state-of-the-art laboratory).</p>
Programme / projects undertaken:
<p>A major role of the IIP is the maintenance of a database for recording information on catches, fish size, etc. This is presently being developed to allow its provincial delegations to access and contribute to it through the internet. This is being developed by a private company using ORACLE; it has a 'working title' of SIRENO – Sistema Informático para a Avaliação de Recursos Pesqueiros. It is presently ACCESS-based and information has to be transferred in most cases by disk to Maputo, creating delays. There are also plans to develop the utilisation of GIS, with assistance from NORAD. A Vessel Monitoring System (VMS), using GPS transmitters on fishing boats, has also been under development for a long time (by the Ministry of Fisheries) but is not yet operational.</p> <p>They have a present focus on the following areas: The Prawn Resources and Associated Fauna on the Bank of Sofala (between Angoche & Beira) Monitoring of Deep-Water Prawn Resources Project South West Indian Ocean Fisheries Project (SWIOFP) – involving links with Kenya, Tanzania, South Africa, the Comores, Madagascar, France and the Seychelles. Monitoring of Artesenal Fisheries Catchment2Coast Project (Integrated Management of the Bay of Maputo)</p>
Target audience (plus number, actual or estimated):
<p>Dissemination of IIP information is to policy-makers, through internal reports and occasional Boletins de Divulgação.</p> <p>Regular workshops and seminars are held with private sector representatives from the industrial sector, normally in the capital. Meetings are also organised with representatives from district and provincial government and with local co-management committees that have been established.</p> <p>Extension workers from IIP and from IDPPE are responsible for disseminating research and investigation results to the artesenal sector; they use pamphlets written in simple (Portuguese) language and workshop formats that 'facilitate understanding'. An Editorial Commission oversees the production of these.</p>
Extent of interaction with CTA – Spore Magazine, SDI, QAS, DORA, seminars, consultants, publications:
None

Name of institution 6:
Instituto Nacional de Investigação Pesqueira (IIP), Maputo
Extent of collaboration / interaction with other institutions (name, nature)
<p>The IIP has links with a number of educational and research institutions: the Universidade de Eduardo Mondlane (Maputo), the Oceanographic Research Institute (Durban); the Food & Agriculture Organisation (Rome); the University of Bergen (Norway); the University of the Algarve (Portugal); the University of Bangor (Wales) and the Institute for Marine Research.</p> <p>IIP collaborates specifically on information management issues with the Kenya Marine & Fisheries Research Institute as part of the South West Indian Ocean Fisheries Project (SWIOFP).</p> <p>IIP also collaborates closely with the IDPPE; they “do the science, whilst IDPPE does the social”.</p>
How information needs are currently met, and from where or by whom:
<p>The IIP sources information through links with local, regional and international institutions (see above). There are closer information-sharing links with neighbouring Indian-ocean countries than there are with other Portuguese-speaking countries in the region (such as Angola).</p> <p>IIP maintains a website and an intranet. The website provides a list of publications (but the publications themselves are not available for download) and access to Fishbase, an independent database providing detailed information on population dynamics, genetics, morphology, trophic ecology, physiology, ecotoxicology, reproduction, etc.²³</p> <p>A ‘meta database’ (MEDI) is being developed between the countries involved in the South East Indian Ocean Fisheries Project to hold fisheries information gathered as part of this programme.</p> <p>Earmarked support to IIP from NORAD provides access to financial support for technicians from IIP to attend long and short-term training and international seminars and workshops.</p>
Main information needs not satisfied:
<p>Main information needs for programme:</p> <ul style="list-style-type: none"> • Data on catches from vessels and artesanal fisheries <p>Major unmet needs:</p> <ul style="list-style-type: none"> • N/A <p>Plans for the future:</p> <ul style="list-style-type: none"> • N/A <p>Resource needs:</p> <ul style="list-style-type: none"> • on-line database access • improved communications in provincial delegations <p>Training needs:</p> <ul style="list-style-type: none"> • English language • Information management technology

²³ Froese, R. and D. Pauly. Editors. 2006. FishBase. World Wide Web electronic publication. www.fishbase.org, version (02/2006).

Name of institution 6:
Instituto Nacional de Investigação Pesqueira (IIP), Maputo
Main problems faced in terms of information and communication management:
<p>The IIP stated that sourcing books and magazines was a problem due to language, costs and the difficulty of sourcing locally through booksellers. They have examined the feasibility of subscribing to on-line access systems for journals but found the costs prohibitive.</p> <p>English language represents a constraint in sourcing information. The IIP has an in-house training focus on English language skills.</p>
Why institution selected as a key:
<p>The IIP is a research institution charged with advisory services. It manages a system of maintaining, retrieving and distributing fishery-related documents and is responsible for the publication of scientific reports, inventories of resources and field guides. It is the custodian of the knowledge basis for fisheries management decisions.</p>

Name of institution 7:
Sistema de Informação dos Mercados Agrícolas (SIMA), within Directorate of Economics, Ministry of Agriculture, Maputo
Objective / mission statement:
<p>To improve small-holder access to markets through providing information on a range of commodities to inform decision-making within retail markets, amongst wholesale traders and at producer level.</p> <p>Two levels:</p> <ul style="list-style-type: none"> • Improved price and marketing information for farmers and traders • Analysis and perspective for policy makers
Field of specialisation:
N/A
Number of staff professional, clerical, technical, etc; permanent / temporary):
<ul style="list-style-type: none"> • 2 x Masters • 1 x Agronomist (BSc) • 1 x Data processor (secondary school) • 2 x clerical staff <p>23 collection sites each have two people responsible for collecting information.</p>
Branches, other sites:
<p>Some provinces have SIMAPs – Nampula, Cabo Delgado, Manica, Maputo & Inhambane. Zambézia and Tete are presently establishing a SIMAP.</p> <p>The SIMA has 23 information collection sites, including all provincial capitals.</p>
Annual budget:
USD\$ 140,000
Source of funding, incl. Main donors / sponsors:
<p>To 2005 sole source of finance was through PROAGRI.</p> <p>From 2005, the Rockefeller Foundation has provided specific assistance to 2 provincial areas (Zambézia & Tete) in order to decentralise the SIMA services (SIMAPs).</p>
Programme / projects undertaken:
N/A
Target audience (plus number, actual or estimated):
Smallholder producers

Name of institution 7:
Sistema de Informação dos Mercados Agrícolas (SIMA), within Directorate of Economics, Ministry of Agriculture, Maputo
Extent of interaction with CTA – Spore Magazine, SDI, QAS, DORA, seminars, consultants, publications:
SIMA was contacted by CTA in 2004 to present a paper on market information at the Maputo conference but have not been approached to be a client of any of CTAs services.
Extent of collaboration / interaction with other institutions (name, nature)
<p>National: FEWSNET, PAMA & Ministry of Industry & Commerce – joint organisation of Market Outlook Conference CTA (private sector) UNAC Economics Directorate of MINAG INE</p> <p>Regional: Agricultural Market Information Centre (AMIC – Zambia) – exchange visits Want to develop links through Rockefeller Foundation to do similar conference in Tete, with involvement of Malawi and Zambia</p>
How information needs are currently met, and from where or by whom:
<p>The SIMA requires information from the countryside regarding prices, transaction costs and commodity volumes and movements on the markets. It receives this from informants in the various areas, using standard forms that are filled in on a weekly basis and sent to SIMA centrally either by fax or verbal transmission. The use of radio is still made in some areas but increased cellphone coverage has lessened the dependency on this as a means of communication. Hard copies of the forms are sent after this via the postal express delivery system.</p> <p>Since 1998, Regional and international price information has been incorporated, using web access. They source from the South African Futures Exchange (SAFEX), the Chicago Board of Trade (CBOT, for trade in Gulf of Mexico) and the Bolsa de Cereais (BC, for South American trade).</p> <p>Data is fed into an SPSS programme. The databases hold information on prices and variables, costs of transport, sources of produce and volumes coming into the markets. There is an internal capacity to programme the SPSS, built largely through TA from Michigan State University. However, more detailed statistical analysis of the data is more of a challenge.</p> <p>The SIMA produces, each Thursday morning, the “Quente-Quente” (Portuguese for “Hot Hot” as in “hot off the presses”) publication. This is published in Word and distributed in hard copy, by fax and by e-mail. Distribution by e-mail has grown considerably; over 300 names now appear on the email distribution list, including farmer organizations and the largest traders in the country. Over 100 copies are distributed each week in paper form, with another unknown quantity reproduced and distributed in the provinces. The Ministry of Commerce regularly uses the information in their bulletins.</p> <p>Information is also transmitted over Radio Mozambique twice during the week, in Portuguese. This service is provided at no cost by RM because they consider it part of their programming (these broadcasts have been able to reach at least 1.1 million rural households, according to the TIA 2002 survey).</p> <p>Ideally, transmissions should be done at provincial level and in vernacular languages but this would involve costs for which there is presently no budget. A study in Tete estimated that this</p>

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would cost MZM 150 million per year to broadcast 5 times a week in 3 languages. Use of community radios at district level has been limited to Nampula and was possible through the assistance of CLUSA.

The “Quente-Quente” information is also re-printed in the Noticias Weekly Economic Supplement and in other newspapers.

SIMA also produces specific research reports and the ‘Flash’ publication, which highlights particular topics of contemporary interest. These are in the nature of research reports and policy briefs, said to be key to influencing attitudes and understanding of policy makers.

SIMA gets access to information from the library within the MINAG.

The SIMA is linked to the MINAG LAN but this is restricted to e-mail distribution and provides no access to any other common resources or services. They back-up their own information on CDs. They have no website of their own and have been told that they can only have a presence on the internet through the MINAG site, which is and has been non-operational for a long period. There is access to SIMA information through the MSU site (however, only one Quente-Quente from 2006 is available at present) – SIMA is interested in making Quente-Quente available through other sites (which they are permitted to do).

There is no dissemination through the cellphone network as yet (examples that SIMA would like to follow exist in Kenya and Malawi). Problems cited in this regard related to quality and coverage of the network.

Main information needs not satisfied:

Main information needs for programme:

- Information on market prices in rural markets, transport costs, market volumes

Major unmet needs:

- Better and more effective means of reaching their target group
- Better ways of using information
- More exposure to other initiatives

Plans for the future:

- Increase coverage of crops (provincial specific) and areas
- Examine ways to reduce costs and cost recovery initiatives
- Greater partnership links with NGOs etc, for collection and dissemination

Resource needs:

- Human resources at SIMAPs – not enough people, not enough time and focus
- Basic equipment and communications solely for use of the SIMAPs at provincial level
- Transport

Training needs:

- Training in SPSS at provincial level (presently using Excel)
- Exchange visits

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Main problems faced in terms of information and communication management:
<ul style="list-style-type: none"> • Cultural problems in not recognising the value of information • Lack of capacity to monitor impact of the information dissemination activities – methodologies and funds to enable regular visits and monitoring • Lack of links to the information users that would allow better tailoring of the information to their needs. The last nationwide assessment of information needs throughout chain (farmers, traders, processors, NGOs, others) was in 2001. • Limited geographical coverage of the system presently • Lack of links with neighbouring countries, particularly in view of extent of cross-border informal trade
Why institution selected as a key:
<p>SIMA produces agricultural market information covering 28 commodities in 21 locations with three basic market levels: retail markets, wholesale traders and producer level. It is responsible for maintaining databases and publications, and supports more locally based provincial SIMAs called SIMAPs, in recognition that much of the information required by farmers is more locally based, as opposed to nationally. A recent User Needs Assessment has identified areas for improvement, many of which are on the side of greater diffusion of information.</p>

III.3 List of persons interviewed

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Dr. Pedro Arlindo Anabela Mabota Antonio Paulo	Adviser Adviser Coordinator	Sistema de Informação dos Mercados Agrícolas (SIMA)	+258 21 460081	parlindo@map.gov.mz

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