

# REPUBLIC OF THE GAMBIA



## **NATIONAL EXPORT STRATEGY** 2013 -2017

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## Acronyms

ACE	Africa Coast to Europe
AfDB	African Development Bank
ACI	Africa Cashew Alliance
AGM	Association of General Manufacturers
AGOA	Africa Growth and Opportunity Act
ACP	Africa, Caribbean and Pacific
ANR	Agriculture and Natural Resources
ARC	AGOA Resource Center
ASYCUDA++	Automated System for Customs Data
ASSET	Association of Small Scale Enterprise in Tourism
AUSAID	Australia Aid for International Development
BA	Bankers Association
BCC	Banjul City Council
BENELUX	Belgium Netherlands and Luxemburg
BIA	Banjul International Airport
BOP	Balance of Payments
CA	Competent Authority
CAG	Cashew Alliance of the Gambia
CBG	Central Bank of The Gambia
CBOs	Community Based Organizations
CCLME	Canary Current Large Marine Ecosystem
CET	Common External Tariff
CFC	Community Fisheries Centers
CPI	Consumer Price Index
CPMS	Cooperative Produce Marketing Societies
CRR	Central River Region
CSO	Civil Society Organizations
DFID	Department for International Development
DoF	Department of Fisheries
DRC	Disaster Recovery Center
DTIS	Diagnostic Trade Integrated Study
ECA	Economic Community for Africa
ECOWAS	Economic Community of West African States
ECOWAS-TEN	ECOWAS Trade Expert Network
EEZ	Exclusive Economic Zones
EIF	Enhanced Integrated Framework
ETLS	ECOWAS Trade Liberalization Scheme
EU	European Commission
EU-EBA	European Union Everything But Arms
FAO	Food & Agricultural Organization
FDI	Foreign Direct Investment
GALDEP	Gambia Lowland Agricultural Development Project
GAMJOBS	Gambia Priority Employment Project
GAMCEL	Gambia Telecommunications Cellular Company Limited
GAMTEL	Gambia Telecommunications company Limited

GBoS	Gambia Bureau of Statistics
GCAA	Gambia Civil Aviation Authority
GCC	Gambia Competition Commission
GCCI	Gambia Chamber of Commerce and Industry
GCI	Global Competitiveness Index
GDP	Gross Domestic Product
GGC	Gambia Groundnut Corporation
GHA	Gambia Hotel Association
GHE	Gambia Horticultural Enterprise
GIA	Gambia International Airlines
GIEPA	Gambia Investment & Export Promotion Agency
GII	Global Information Infrastructure
GMD	Gambia Dalasi
GMT	Greenwich Mean Time
GNAIP	Gambia National Agricultural Investment Program
GoTG	Government of The Gambia
GPA	Gambia Ports Authority
GPTC	Gambia Public Transportation Corporation
GRA	Gambia Revenue Authority
GRTS	Gambia Radio and Television Services
TGSB	Gambia Standards Bureau
GSM	Global System for Mobile Communications
GSP	Generalized System of Preferences
GTB	Gambia Tourism Board
GTTI	Gambia Technical Training Institute
HACCP	Hazard and Critical Control Points
HDI	Human Development Index
HR	Human Resources
HRD	Human Resource Development
IFMIS	Integrated Financial Management Information System
ICT	Information Communications Technology
IMF	International Monetary Fund
IFC	International Finance Corporation
IRD	International Relief for Development
ISO	International Standards Organization
ISP	Internet Service Provider
ISRT	Interstate Road Transit
IT	Information Technology
ITC	International Trade Center
JETRO	Japan External Trade Organization
KMC	Kanifing Municipal Council
KOTRA	Korea Trade Promotion Corporation
LRR	Lower River Region
M&E	Monitoring and Evaluation
MATRADE	Malaysia Trade Ministry
MATRICOM	National Committee on Mainstreaming Trade & Trade-Related Issues
MDA	Ministries, Departments, Agencies

MDG	Millennium Development Goals
MDI	Management Development Institute
MoBSE	Ministry of Basic and Secondary Education
MoD	Ministry of Defence
MOFEA	Ministry of Finance and Economic Affairs
MoHERST	Ministry of Higher Education Research Science & Technology
MoI	Ministry of Interior
MoLGL	Ministry of Local Government & Lands
MSME	Micro Small Medium Enterprises
MOICI	Ministry of Information, Communication & Infrastructure
MoFWR&NAM	Ministry of Fisheries Water Resources & National Assembly Matters
MOJ	Ministry of Justice
MOTC	Ministry of Tourism & Culture
MOTIE	Ministry of Trade, Industry, Regional Integration & Employment
MOU	Memorandum of Understanding
MT	Metric Tonne
NARI	National Agricultural Research Institute
NAWEC	National Water and Electricity Company
NBR	North Bank Region
NCAC	National Centre for Arts & Culture
NCC	National Codex Committee
NEA	National Environmental Agency
NES	National Export Strategy
NGOs	Non-Governmental Organizations
NRA	National Roads Authority
NCSPSC	National Codex Sanitary & Phytosanitary Committee
NTA	National Training Authority
OECD	Organisation for Economic Cooperation and development
OMVG	Gambia River Basin Development Organisation
OVP	Office of the Vice President
PAGE	Program for Accelerated Growth and Employment
PHL	Public Health Labs
PMO	Personnel Management Office
PPP	Public Private Partnerships
PPP	Purchasing Power Parity
PPS	Plant Protection Services
PSR	Public Service Review
PURA	Public Utility Regulatory Authority
QCell	Quantum Cellular Company
R&D	Research & Development
RCN	Raw Cashew Nuts
RTGS	Real Time Gross Settlement
RRR	Required Reserve Ratio
SDF	Social Development Fund
SPS	Sanitary & Phytosanitary Standards
SSA	Sub-Saharan Africa
STDF	Standards and Trade Development Facility



T-bills	Treasury Bills
TCI	Trade Competitiveness Index
TMC	Tourism Marketing Committee
TTAG	Travel & Tourism Association of The Gambia
TVET	Technical Vocational & Education Training
UEMOA	Union Economique et Monetaire Ouest Africaine
UNDP	United Nations Development Programme
UNCTAD	United Nations Conference on Trade and Development
UNTA	United Nations Tourism Authority
URR	Upper River Region
USAID	United States Agency for International Development
US	United States
USD	United States Dollar
UTG	University of The Gambia
VAT	Value-Added Tax
VISACAS	Village Savings and Credit Associations
WA-EU EPA	West Africa European Union Economic Partnership Agreement
WAQP	West Africa Quality Programme
WATH	West African Trade Hub
WB	World Bank
WCR	West Coast Region
WEF	World Economic Forum
WFP	World Food Program
WHO	World Health Organization
WTO	World Trade Organization

## Foreword - His Excellency, the President of The Republic of The Gambia

The National Export Strategy is an important milestone in the economic development aspirations of The Gambia. As we strive for the strategies that would enable us achieve the economic development goals conceived under my stewardship in Vision 2020, I recall the Mission Statement of the national development blueprint, which places emphasis on International Trade, especially the development of Gambian exports. Over the course of the last decade, we have seen a drop in our merchandise trade despite the gains registered in the decade in real economic and GDP growth.

During the 18<sup>th</sup> African Union Summit held in Addis Ababa, Ethiopia in January 2012, the dismal level of intra-African trade was lamented and the leadership that gathered at the Summit sought answers to overcome the limitations and challenges that beset intra-African trade. The conception, development and the launching of the National Export Strategy for The Gambia, is therefore not only timely but a reflection of my Government's commitment to promoting Gambian exports both on the international, regional, and sub-regional markets.

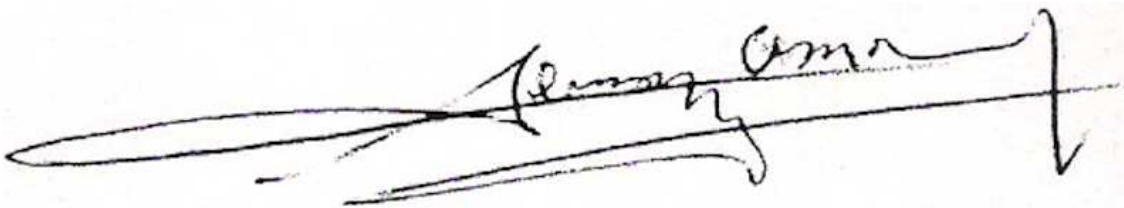
The National Export Strategy, which will guide the development and promotion of Gambian exports and which is to be implemented over a 5-year period – from 2012 to 2016 – seeks to achieve export-led economic growth; improve and sustain export performance; and ensure export competitiveness. In line with the objectives of Vision 2020 and the recently launched Programme for Accelerated Growth & Employment (PAGE), the National Export Strategy overriding objectives are to create employment; alleviate poverty; improve and sustain the contribution of the National Export Strategy sectors to GDP; improve trade facilitation; and promote Gambian women participation in exports given the focus in Horticulture, Fisheries, and Cashew.

As we implement the National Export Strategy, I once again remind all Gambians that our success in the implementation of the strategy rests with us. The critical success factors outlined in the strategy document clearly spells out what we must do as a nation to achieve success. The need for the establishment of an NES Fund, the need for monitoring and evaluation of the strategy activities, the need to convene a donors' roundtable, and the need to institute an effective trade facilitation body are all imperatives that must be ensured if we are to become a net-exporting nation.

In our aspiration to become a formidable exporting nation, we should equally pay attention to the requirements of quality and standards of the international market. It is for reasons of meeting these international standard requirements that my Government has instituted the Gambia Standards Bureau through an Act of Parliament in 2010 to ensure that Gambian products meet the demands of both the local and international market. I therefore urge the Standards Bureau to support the endeavours of the National Export Strategy and work diligently to ensure that products and produce of The Gambia conform to international standards best practices.

Equally, I want to seize this opportunity to once again call upon the private sector to take up the challenge and leverage the fiscal incentives and benefits extended by The Gambia Investment and Export Promotion Agency to grow their business with the objective of exporting to the international market. My Government, through the National Development Blueprint of Vision 2020, is of the belief that the Private sector is the engine of growth of our economy and in that regard, we would do all that is possible to continually improve the business environment within which you operate.

I commend all the farmers, NGOs, CSOs, the Private Sector, Government institutions and Parastatals that participated in the development of the Strategy. I thank the Ministry of Trade, Industries, Regional Integration and Employment and the Ministry of Finance and Economic Affairs for their leadership in engaging the Commonwealth Secretariat to support the development of the Strategy. My appreciation also goes to the Commonwealth Secretariat for funding the development of the Strategy. I commend The Gambia Investment and Export Promotion Agency for taking the lead role in coordinating and developing the National Export Strategy. Lastly, I seize this opportunity and make that clarion call to all Gambians and friends of The Gambia to support the implementation of the National Export Strategy.

A handwritten signature in black ink, appearing to read 'Yahya A.J.J. Jammeh', written over a horizontal line. The signature is stylized and includes a long horizontal stroke extending to the left.

Yahya A.J.J. Jammeh  
**President, Republic of The Gambia**

**Statement – The Minister, Ministry of Trade, Industries, Regional Integration & Employment**

International Trade continues to be an important component of national economic development and remains as one of the most important contributors to world economic output. As nations strive to increase their global share of world trade, it is only prudent that strategies be put in place to support the realization of these objectives. In this vein, the development of a National Export Strategy to guide the export development and promotion aspirations of The Gambia, as contained in Vision 2020, is not only rational but necessary.

Trade has remained an important economic activity in The Gambia and the Gateway initiative pursued by the Government since the dawn of the Second Republic under the distinguished leadership of the President, Sheikh Professor Alhaji Dr. A.J.J. Jammeh, is an attestation to the fact that trade and export development, in particular, should be an important focus for our national economic development. It is my sincere conviction that the strategies identified under the National Export Strategy (NES) would help our country in the near future to become a net exporting nation.

The National Export Strategy overriding goals and objectives are well aligned with those set under the national economic development blueprint of Vision 2020. This alignment of the goals and objectives of the NES to those of Vision 2020 is indicative of the robust and comprehensive consultative process undertaken during the development of the NES. Evidently, the NES is in a large measure a complement to the Programme for Accelerated Growth and Employment and draws from the objectives of the National Trade Policy. The participation by the lead institutions of the various sectors and sub-sectors in the development and costing of the activities that comprise the various strategies of the NES is indicative of the level of success to be realized in the implementation of the Export Strategy.

The implementation of the Export Strategy should be pursued with vigor and commitment by all stakeholders. As the Minister of Trade, Industry, Regional Integration and Employment and the Chairman of the National Implementation Steering Committee, I assure you of the commitment of the Ministry to spearhead and ensure that the strategies of the National Export Strategy are achieved. I urge all those institutions identified within the various sectors and sub-sector Working Groups of the NES to show resolve and commit to fulfilling their obligations to the NES and ensure implementation of the identified activities for the achievement of its goals and objectives.

As the Ministry with oversight for The Gambia Standards Bureau, we note the strategies for the improvement of quality and standards in the priority areas of the NES and I am committed to ensuring that The Gambia Standards Bureau undertakes the identified activities.

I seize this opportunity to thank the former Ministry of Economic Planning and Industrial Development and the Ministry of Finance and Economic Affairs, for their leadership in the development of the National Export Strategy. I also thank the Gambia Investment and Export Promotion Agency for taking the lead in the development of the Export Strategy and the NES Steering Committee for a job well done. The National Export

Strategy would not have been possible without the assistance from the Commonwealth Secretariat. We thank the Commonwealth Secretariat, especially the Project Manager, Mr. Isaac Njoroge, for their support.

Kebba Touray

**Minister, Ministry of Trade, Industry, Regional Integration & Employment.**

**Statement: Chief Executive Officer, Fatou M. Jallow, GIEPA**

The development of a National Export Strategy (NES) for The Gambia is an important milestone for the Gambia Investment & Export Promotion Agency (GIEPA). As an Agency with an export development, investment promotion and enterprise development mandate, the development of the National Export Strategy is a necessity to guide us in our drive to realize the export development aspirations of The Gambia as contained in our national development blueprint Vision 2020 and the Programme for Accelerated Growth & Employment (2012 -2015).

The development of the NES was underpinned by very robust engagements with all stakeholders in the public sector, private sector, NGOs and donor community across the country. The rationale for this consultative approach was to ensure that the strategies to be implemented reflect the realities on the ground and are relevant to confronting and addressing the challenges of export development in The Gambia.

The development of the NES was driven by Mr. Benjamin Roberts, Director of Business & Export Development at GIEPA who also served as the Project Coordinator with the support of the National Export Strategy Steering Committee drawn from all relevant sectors including civil society and academia. Sector teams and a drafting team were also constituted for the development of the NES. My sincere appreciation to members of the Steering Committee and all the teams for their technical expertise, commitment, sense of ownership and the team spirit demonstrated throughout the process. I thank the Commonwealth Secretariat for funding the development of the NES and Isaac Njoroge, the Project Manager, for the technical guidance provided.

I acknowledge the support of the former Ministry of Economic Planning and Industrial Development and the Ministry of Trade, Industry, Regional Integration & Employment in the development of the National Export Strategy. My appreciation also goes to the GIEPA Board of Directors for their support and guidance.

Special thanks to the staff of GIEPA particularly the Business & Export Development Department for their efforts in this project. Special commendation to Mr. Benjamin Roberts, the Project Coordinator, for his dedication and commitment to seeing this project to completion.

Total active stakeholder participation is critical for the successful implementation of the NES. I urge all stakeholders to support the implementation of the NES strategies for us to realize sustainable economic growth, wealth creation and prosperity for the people of The Gambia as highlighted in the NES Vision.

**Statement: Project Coordinator, Benjamin A. Roberts, GIEPA**

The National Export Strategy, amongst other objectives, seeks to address the imbalance in the country's Balance of Trade. As the first true initiative undertaken by Government to promote, develop, and diversify the country's export base, the NES development process has been consultative and participatory. During the numerous consultative engagements, a point that was repeatedly echoed is the funding need for the implementation of the activities identified for the strategic action plans conceived in the NES blueprint.

The fact remains that The Gambia does not operate in autarky and for the NES to be successfully implemented, we would have to draw from the opportunities presented by the multilateral trading system. Bilateral, plurilateral, and multilateral relationships would have to be leveraged and so would our sub-regional, regional, and multilateral trading regimes.

As a WTO member, we are obligated to adhere to the protocols of the global trading platform and what we undertake to achieve through our sub-regional and regional trade groupings would have to be done in consonance with WTO protocols. Whilst these protocols can sometimes pose limits, the opportunities they present are real. One of these opportunities is the Trade Facilitation platform, which The Gambia, as a developing country, must leverage to enhance its level of competitiveness. Transportation and Trade Facilitation is a relevant component of the National Export Strategy and its cross-cutting stance makes it all the more imperative. The roles to be played by the Gambia Revenue Authority, the Gambia Ports Authority, The Association of Clearing and Forwarding Agencies, the Transportation Association, The Truck Owners Association, and the Immigration and Police Departments of the Ministry of Interior are all too imperative.

What is perhaps not evident is the role that Information Technology can play in the Trade Facilitation process. It is for this reason that Telecommunications is included in the NES priority sectors to give the country a trade gateway and enterpôt competitive edge.

As a true trade gateway, the opportunities for growth would be abundant and these would undoubtedly impact the agricultural and natural resource sectors – the sectors that constitute the greater part of the National Export Strategy. The economic development aspirations of this country must start with a focus on agriculture. The NES is oriented to drive that aspiration and is underpinned by the firm belief that realized progress in agriculture is realized progress in both the industry and service sectors of our economy.

**Statement: Project Manager, Isaac Njoroge, Commonwealth Secretariat**



## Acknowledgements

The development of the National Export Strategy, realized under an engaging consultative framework led by The Gambia Investment & Export Promotion Agency, would not have been possible without the contribution of Farmers across the country, the Private Sector, Private Sector Associations, the Non-Government Organizations, Civil Society Organizations, the Municipalities, the Office of the Governors, the Parastatals, the various Government Ministries and Institutions, and the Central Government.

The Gambia Investment & Export Promotion Agency, the Ministry of Trade, Industry, Regional Integration and Employment, and the Commonwealth Secretariat seize the opportunity to thank the farmers across the country, the different organizations and associations, the NGOs and CSOs, and both Central & Local Government for their support and input in the development of the National Export Strategy.

A special thank you is extended to the twenty-five members of the National Export Strategy Committee – the NES Committee – without whose input the realization of the Strategy would have been a challenge. We recognize the input of the NES Committee at the Inception Workshop, the National Retreat, the Pre-validation Workshop, and National Validation Workshop.


The contributions of the team that drafted the Strategy are worth noting as well. Special thank you goes to the 5-member Drafting Team, who traveled the length and breadth of the country during the Countrywide Consultation with the farmers, fisherfolks, and women horticultural associations. We also thank the Gambia Radio & Television Services (GRTS) for their invaluable coverage of the Countrywide Consultations.

We thank the Ministry of Finance & Economic Affairs for taking the lead in engaging the Commonwealth Secretariat to fund the development of the National Export Strategy. We also note that the contributions made by the former Ministry of Economic Planning & Industrial Development, now subsumed under the Finance Ministry. We also thank the Government of the Republic of The Gambia for having the foresight and acknowledging the important role that exports could play in the economic development of the country and tasking the respective Finance & Trade Ministries to develop the National Export Strategy to drive the export promotion and development needs of the country.

We thank the National Coordinator from GIEPA and the Project Manager of the Commonwealth Secretariat for providing the leadership, coordination, and adherence to the timelines of the programme for the development of the Strategy.

# COUNTRY PROFILE<sup>1</sup>

## Background

- Flag: 
- Gained independence in 1965
- Government Type – Republic
- Capital - Banjul
- Has 7 Administrative Regions
- Mixed legal system of English common law, Islamic law, and Customary law
- Suffrage - 18 years

## Economy

- Natural Resources include fish, clay, silica sand, tin, zircon, and titanium
- GDP in Purchasing Power Parity (PPP) is US\$3.774 billion in 2011 (est.)
- GDP in real terms is US\$1.1 billion (Official Exchange Rate)
- Export as a ratio of GDP (Exports/GDP) is 18% (*WTO, TPR, 2010, using 2008 stats.*)
- GDP growth rate in 2011 is 5.5%
- GDP per capita in PPP terms is US\$2,100 (2011)
- Economy comprises of Agriculture, Industry, and Service sectors
- Agriculture accounts for 30% of GDP; Industry 15% ; & Services 55%

## Geography

- Situated in West Africa, bordering the North Atlantic Ocean and Senegal
- Total land area of 11,295 square kilometers
  - 10,000 square kilometers of land area
  - 1,295 square kilometers of water bodies with a 80 kilometer coastline
- Exclusive fishing zone of 200 nautical miles with continental shelf

## People

- Population size of 1.8 million people (est.)
- 0-14 year age group accounts for 40% of the population
- 15-64 year age group accounts for 56.9% of the population
- 65 years and over accounts for 3.1%
- Annual population growth rate is about 2.344%
- Literacy, defined as those of age 15 and over who can read and write
  - 40.1% of the population is literate
  - 47.8% literacy rate for males
  - 32.8% literacy rate for females.

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<sup>1</sup> Source: CIA World Fact Book – March 2012 (<https://www.cia.gov/library/publications/the-world-factbook/geos/ga.html>)

## ORGANIZATION OF THE NATIONAL EXPORT STRATEGY

The National Export Strategy (NES) is organized into six sections along with an Executive Summary.

- **Executive Summary** provides an overview of the Strategy and highlights major points of all the six sections.
- **Section 1** addresses the reasons for the need for a National Export Strategy and pinpoints the Strategy Goals, the Strategy Objectives, and the Critical Success Factors that are necessary for the implementation of the Strategy to be successful.
- **Section 2** highlights the Vision of the National Export Strategy and pinpoints the linkage of the NES Vision to the Mission Statement of Vision 2020. The section also depicts the Keywords of the NES Vision and their connotations. Also outlined in this section is the framework that underpins the Strategy and the key strategic anchors that are deemed essential for the achievement of the objectives indicated under Section 1.
- **Section 3** outlines the consultative process that was undertaken to develop the Strategy and the rationale and criteria used to identify the sectors, sub-sectors, and cross-cutting sectors that constitute the Strategy. The section identifies sectors, sub-sectors, and Cross-cutting sectors of the Strategy with an overview of their situational analysis, SWOT Analysis, and indicative overview of the export performance of the country. It also captures a statement by the Strategy Project Coordinator.
- **Section 4** focuses on the way forward and seeks answers to “Where we want to be.” The section highlights the Vision of the Priority sectors, their objectives, and strategic activities to achieve the objectives.
- **Section 5** delineates the financing of the Strategy and looks at the possible sources of funding from Government and Donors. It also identifies possible Multilateral & Bilateral Technical Assistance and support sources for implementation of the Strategy. The section maps out the costing of the specific activities undertaken in each of the Priority Sectors, sub-sectors, and cross-cutting sectors.
- **Section 6** identifies the lead and supporting institutions that would be responsible for the implementation of the Strategy. It also indicates the implementation plan and timeframes for monitoring and evaluation purposes.

# SECTION 1

## WHY A NATIONAL EXPORT STRATEGY

The Gambia, a natural entréport and the smallest country in mainland Africa, both in terms of geographic area and population, is confronted with the challenge of expanding its economic growth amidst limited natural and financial resources. Confronted with such limitations, it must answer the question “where is the economic growth of the country going to come from amidst a small population size and limited natural resources?”

As a developing country, The Gambia has since independence been battling with challenges of market size, effective local demand, exogenous global shocks of rising oil prices, fluctuating commodity prices, and an undiversified product and export base. It is therefore not surprising, with few exceptional years, that the country has traditionally incurred a Current Account Balance of Payment (BOP) deficit position. Given the challenging experience of the 1980s – a lost decade for the country in terms of economic growth – and the recent experiences of fluctuating economic growth, the country is undertaking the conscious effort to help accelerate economic growth and in the process address its challenges of unemployment, BOP deficits, a narrow export base, limited product diversification, inflation, and administrative challenges relating to trade facilitation.

It is in the above spirit that the country seeks to develop a comprehensive and its first National Export Strategy (NES). The development of a NES is therefore intended to wean the country from being a Net Importing nation to a Net Exporting nation. Amidst this objective and notwithstanding the forces of globalization, it is apparent that for implementation of a successful NES, the country must contend with issues of global competitiveness given the stark realization that the economic growth of countries now impinge largely on exports. As both developed and developing countries vie for international market share in an increasingly sophisticated market that demands better international standards, The Gambia must differentiate itself from the competition. Achieving this feat cannot happen outside of a National Export Strategy and it is for this reason that the country undertakes to differentiate itself through the formulation of a National Export Strategy to guide its export ambitions contained in Vision 2020.

## NATIONAL EXPORT STRATEGY GOALS

The goals of the National Export Strategy are:

- (i) To achieve export-led economic growth
- (ii) Improve and sustain export performance
- (iii) Achieve trade competitiveness

## NATIONAL EXPORT STRATEGY OBJECTIVES

In line with the above goals, the NES seeks to achieve these objectives:

- (i) Leverage the Market Access provided by the various Multilateral, Plilateral, and Bilateral Preferential Market Access treatments
- (ii) Promote the development of Packaging & Labeling to meet international market requirements
- (iii) Institutionalize a functional Trade Facilitation Committee supported by an integrated trade facilitation framework
- (iv) Improve Quality & Standards Infrastructure
- (v) Create employment and alleviate poverty
- (vi) Promote women in exports
- (vii) Develop human capacity in trade, especially exports
- (viii) Improve and sustain the contribution of the NES sectors to GDP
- (ix) Standardize administrative procedures that underpin trade, especially exports
- (x) Facilitate for greater involvement of banks in the financing of trade

## NATIONAL EXPORT STRATEGY KEY SUCCESS FACTORS

For a successful implementation of the National Export Strategy, the following are imperative:

- (i) Continued Political will & commitment
- (ii) Aid for Trade initiative
- (iii) Establish an NES Fund to be financed through a trade surcharge scheme as Government budgetary subvention would not be sufficient to implement the NES
- (iv) Convene a Donors Roundtable through the Commonwealth Secretariat to:
  - a. Seek funding support and commitment for implementation of the NES activities
  - b. Seek Technical Assistance and commitment for implementation of the NES activities
  - c. Seek capacity building support and commitment for implementation of the NES
- (v) Create an M&E Committee responsible for tracking the implementation of the NES with oversight from the Ministry of Trade, Industry, Regional Integration & Employment
- (vi) Reconstitute MATRICOM with representation from senior staff of the constituting bodies with the requisite authority and mandate for Trade Facilitation and support to the productive sector and responsible for the following:
  - a. Review the existing Trade Facilitation process with the objective of streamlining export & trade documentation administrative procedures
  - b. Undertake advocacy to render Trade Facilitation a means to enhancing trade competitiveness and not a means to policing of trade
  - c. Achieve automation and inter-linkage amongst all the trade facilitation bodies by 2016
  - d. Other aspects of the TOR of MATRICOM

## SECTION 2

### THE NATIONAL EXPORT STRATEGY VISION

The President of the Republic of The Gambia, His Excellency Sheikh Professor Dr. Alhaji Yahya A. J. J. Jammeh, in May 1996 gave the commitment and support of his Government to the principal development strategy expected to bring about the economic development aspirations of The Gambia. This national development strategy is “*The Gambia incorporated ... VISION 2020.*”

In his message at the official adoption ceremony of ‘Vision 2020 Inc.’ the President pointed out that:

*The concept of "The Gambia Inc." is very significant. First and foremost, it is the recognition of the creative spirit of the private individuals as a catalyst towards the achievement of the common good. Secondly "The Gambia Inc." seeks to empower the people in order for them to realize their fullest potentials in a free and competitive environment. Vision 2020 postulates that all Gambians, wherever they are and all foreigners residing in The Gambia, will contribute positively to national development and will enjoy fully the fruits of such development. Like shareholders in a joint-stock company, the success of The Gambia Inc. depends on the effective participation of all stakeholders. Third, it is also recognition of the limitation of Government's role solely to the correction of market failures and the provision of public goods, which cannot be produced by the private sector.*

The private-sector-led growth initiative of ‘Vision 2020 Inc.’ is best captured in the Vision’s Mission Statement:

*To transform The Gambia into a financial centre, a tourist paradise, a trading, export-oriented agricultural and manufacturing nation, thriving on free market policies and a vibrant private sector, sustained by a well-educated, trained, skilled, healthy, self-reliant and enterprising population and guaranteeing a well-balanced eco-system and a decent standard of living for one and all under a system of government based on the consent of the citizenry.*

It is in the spirit of the declaration made by the President and that of the Mission Statement of Vision 2020 from which the **National Export Strategy** (NES) vision draws its inspiration.

In the spirit of both the President’s declaration and the Mission Statement of Vision 2020, the National Export Strategy Vision – the NES Vision – undertakes thus:

**“To become a world class exporting nation that is efficient and competitive leading to sustainable economic growth, wealth creation, and prosperity.”**

The *key words* of the NES Vision connote the following:

<p><b>WORLD CLASS</b></p> <p>Providing export goods and services befitting of international standards</p>
<p><b>EXPORTING NATION</b></p> <p>Being among the leading exporting nations of the world and a net-exporter of goods and services</p>
<p><b>EFFICIENT</b></p> <p>Optimize our trade platforms to render export activities seamless</p>
<p><b>COMPETITIVE</b></p> <p>Competing globally on international market parameters of quality, standards, price, service delivery, and turn-around-time.</p>
<p><b>SUSTAINABLE</b></p> <p>Prudently utilizing our resources to ensure maximum economic and social benefits to both current and future generations and thus ensuring lasting economic and political stability</p>
<p><b>ECONOMIC GROWTH</b></p> <p>Realizing annual increments and improvements in the standards of living of Gambians while concurrently improving upon the cost of living</p>
<p><b>PROSPERITY</b></p> <p>Ensure a thriving country with good fortunes and success for all its citizenry</p>

In line with the Mission Statement of Vision 2020, the National Export Strategy seeks to contribute to the economic development aspirations of The Gambia through alignment of its goals with the objectives of Vision 2020.

## THE NATIONAL EXPORT STRATEGY FRAMEWORK

The National Export Strategy framework is an outline of how the NES fits into the overall economic development aspirations of the county. The logic of the NES framework is underpinned by the fact that the NES is not conceived in isolation of the existing national economic development agenda but is rather a set of strategies intended to complement the universal economic development plans of the country so contained in Vision 2020.

The NES foundation building block is Vision 2020 – the national economic development blueprint. Vision 2020 has broad based objectives for Agriculture and Natural resources, Industry & Infrastructure, Services, Human Resource Development, Population, Housing, the Environment, the Private Sector, and Public Sector Institutions but the principal objective is to for socio-economic that aims at raising the standard of living of The Gambian population by transforming The Gambia into dynamic middle-income country.

The subsequent building block is the Programme for Accelerated Growth & Employment (PAGE) followed by the National Trade Policy with the National Export Strategy at the Apex of the framework. The objective of the PAGE is to accelerate pro-poor growth and generate employment whilst the National Trade Policy is focused on addressing the challenges of trade imbalance and rendering The Gambia a net exporting nation.

Within this framework, the National Export Strategy first and foremost reflects the aspiration of Vision 2020 for export development. In the same vein, the National Export Strategy reflects the essence of the more specific economic and business goals of the PAGE whilst providing the detailed strategies necessary to achieve the broad export goals of the National Trade Policy. The National Trade Policy addresses the broad goals for import and export policy whilst the National Export Strategy specifically provides for export development and promotion.





## **IMPERATIVES OF THE NATIONAL EXPORT STRATEGY**

The National Export Strategy is premised on key strategic anchors that are essential for its implementation and the achievement of its objectives.

The strategic anchors are the essential building blocks without which achievement of the objectives of the NES would be ad hoc, minimal, or impossible. These essential building blocks are:

- Stakeholders Commitment
- Productivity & efficiency
- The Business Environment – principally taxes and environmental considerations
- Export Competitiveness
- Public Private Partnership
- Multilateral & Bilateral Trade Agreement Protocols
- ECOWAS Protocols
- Market Access – AGOA, EU-EBA, WA-EU EPA

**STAKEHOLDERS COMMITMENT** is an essential building block of the NES because without it the implementation and M&E of the NES would not be achieved. As such, this is perhaps one of the most crucial elements to realizing the objectives of the NES. Stakeholders Commitment, however, extends beyond implementation and M&E as it also includes the commitment of the Government to the NES through its support for a funding initiative and the creation of a NES Fund to be financed by an import surcharge scheme that may require Parliamentary Enactment and passage of legislation. Equally Stakeholders Commitment includes the role of the Donor Community for funding support, technical assistance, and capacity building in export development and promotion.

**PRODUCTIVITY & EFFICIENCY** are essential building blocks of the NES considering their cross-cutting importance. Agriculture is an important pillar of the NES with Horticulture, Cashew, and groundnuts been the focus value chains. As such there is need to improve upon the productivity & efficiencies inherent in agriculture if the sector is to become a major contributor to GDP. Currently agriculture employs over 70% of the labour force but contributes around 30% to GDP. The productivity and efficiency challenges are not only limited to agriculture as it is a cross cutting issue and there is need to improve the productivity and efficiency levels of overall human capacity.

**THE BUSINESS ENVIRONMENT** remains the key driving force of economic activity. As such, there is need to review the challenges highlighted by businesses especially as it relates to the number and incidence of taxes. Whilst the challenges on energy are also worthy of note, the program of action put in place by the Programme for Accelerated Growth and Employment (PAGE) is sufficient to address these challenges in the medium to long term. The challenge emanating from the levels and incidence of taxes should be approached in a holistic manner with a view to gradually reducing the corporate and personal income tax and synchronizing these to the new value added tax (VAT) with the overriding objective of broadening the tax base for improved revenue receipts for the Government and increased level of tax compliance and avoidance and evasion of tax. Equally important is to ensure that businesses are compliant with environmental protocols of the National Environment Agency (NEA) considering the standards

that are now required to be upheld by businesses engaged in trade of commodities. Addressing these business environment challenges, notably taxes and energy, could help in improving the price competitiveness of Gambian exports.

**EXPORT COMPETITIVENESS** is an essential building block of the NES as this is the medium through which the exports of The Gambia can compete in the international market meeting all international market demands of packaging and labeling and product quality for improved market access. Meeting international market standards demands compliance to basic international requirements, such as, Sanitary & Phyto-sanitary Standards (SPS) and Hazards and Critical Control Points (HACCP). Meeting these standards requires establishment of laboratories and institutions to ensure compliance with international governing standards in international trade in food & foodstuffs. Export Competitiveness encompasses Trade Facilitation and as such, the perspective by trade handling institutions should be one of facilitators considering the improvement in revenue and foreign exchange earnings for Governments as a result of improved efficiency. Within this parameter of Export Competitiveness, other notable enhancers are the use of Information Communication Technology (ICT) to streamline Customs & trade documentation procedures with the objective of achieving in the medium to long term an automation of the Trade Facilitation process. This automation is to include Customs cargo clearing; cargo forwarding; transshipment; transit trade and haulage; provision of Customs and Police Escort Services for the Re-export Trade; and better organization of Trucking & Haulage services for the Re-export Trade.

**PUBLIC PRIVATE PARTNERSHIP** as an essential building block of the NES is intended to forge a complementary business relationship between the Government and Private enterprises for the successful implementation of some of the identified strategies of the NES. The objective is to promote private sector participation in some of the value chains identified in the NES document. It is expected that this would allow for a more efficient and competitive export sector. It is also expected that the PPP initiative would help bring about greater dialogue and foster better cooperation between Government and the Private sector.

**MULTILATERAL & BILATERAL TRADE AGREEMENT** as an essential building block of the NES seeks to achieve three objectives.

The first is to develop the human resource capacity in Trade Policy and Trade Negotiation skills in efforts to improve upon our Multilateral and Bilateral Trade negotiations.

The second objective is to change the approach in which Multilateral and Bilateral Trade Agreements are consented to. This objective seeks to maximize the potential benefits of Multilateral and Bilateral Trade Agreements by ensuring that a bottom-up approach to entering into such agreements is adopted. Within such approach, all agreements to be entered into would be preceded by a needs assessment through the consultative dialogue and advocacy mandate of the Gambia Investment & Export Promotion Agency. Equally, the Agency would ensure that once signed the provisions and opportunities provided by the agreements are made known to the business community and importing country requirements advised to leverage the agreements to reap the potential benefits. For achievement of such objectives, it is recommended that GIEPA be represented at bilateral forums when both Multilateral and Bilateral Trade Agreements are being conceived, negotiated, and signed.

The third objective is to advocate for the pursuance of possible Bilateral Trade Agreements with identified countries that have markets for our products or are sources of raw materials for local manufacturing and processing outfits. These would be pursued through the Ministry of Trade, Industry, Regional Integration and Employment with the support of the Ministry of Foreign

Affairs. By extension, such initiatives would be pursued with countries that share similar outlook in terms of our International Policy dispensation and geopolitical stance.

**THE ECONOMIC COMMUNITY OF WEST AFRICAN STATES (ECOWAS)** is an essential building block of the NES in that The Gambia is a founding member. As such, all Multilateral and Bilateral Agreements to be entered into must be undertaken in cognizance of the protocols of the ECOWAS. Beyond this, the provisions of the ECOWAS Protocols, notable among which are those impinging on Trade – the Interstate Road Transit (ISRT – Article 32 of the Treaty), the ECOWAS Trade Liberalization Scheme (ETLS- Article 50 of the Treaty), the Common External Tariff (CET – Article 37 of the Treaty), Rules of Origin (Products emanating from member countries), and Re-exportation within ECOWAS of goods from Third Countries – impact directly on the NES and as such compliance with these Protocols calls for a solid capacity building on the ECOWAS Treaty to ensure that the pursuance of the objectives of the NES does not breach compliance with the Protocols and where it does that the necessary provisions would be undertaken for exemption. In the same vein and considering that The Gambia is a signatory to the WTO and of which ECOWAS member countries are members, the enactment of the proposed legislation for a NES Fund to be financed through an import surcharge scheme must also be pursued under the provisional guidelines of both the WTO and ECOWAS considering the possible contravention of the Principles of National Treatment and that of the ECOWAS Trade Liberalization Scheme (ETLS). It is also important for ECOWAS to ensure the enforcement and implementation of the ratified protocols.

**MARKET ACCESS** as an essential building block of the NES seeks to take advantage of the preferential market access opportunities offered by the US Africa Growth and Opportunities Act (AGOA); the EU Everything But Arms initiative (EU-EBA); and the West Africa-EU Economic Partnership Agreement (WA-EU EPA). While these preferential trade agreements (PTA) exist, they are not automatic guarantees of Market Access but rather certain requirements have to be met for the preferential market access to be realized. The NES takes cognizance of these preferential market access requirements and the outlined strategies within the NES sectors caters for realization of these requirements. However, the support needed to actualize these requirements must be forthcoming from all relevant stakeholders – Government, Donor Community, private sector participants, Embassies, and multilateral institutions.

## SECTION 3: WHERE WE ARE

### THE NATIONAL EXPORT STRATEGY CONSULTATIVE PROCESS

Robust consultative engagements were undertaken for the development of the National Export Strategy. These consultative engagements were in the form of workshops, retreats, sector and sub-sector meetings, countrywide regional consultations with farmers, municipality consultations, one-on-one meetings, radio and TV programmes, and symposium. The rationale for the consultative approach was to ensure that the interests of all relevant stakeholders are reflected in the NES document and equally to ensure that the proposed strategies for the implementation of the NES are relevant to the realities of the challenges confronting export promotion and export development.

During the consultative engagements there were both convergent and divergent views on the following:

- (i) What sectors and sub-sectors were deemed to be relevant for inclusion in the National Export Strategy
- (ii) Why some sectors and sub-sectors were deemed more relevant than others
- (iii) Concerns as to whether the NES should focus on products in which The Gambia is deemed to have a *Comparative Advantage* or a *potential* to export
- (iv) The current competitiveness of the country and if a National Export Strategy would help to improve it
- (v) How a National Export Strategy would benefit the poor and help with employment creation
- (vi) What benefits would a National Export Strategy bring for women
- (vii) Would the NES be another exercise for which there would be no results

Of particular interest to the National Export Strategy were the views of the farmers during the countrywide consultations across all the seven administrative regions of the country, and especially so for the views of the women farming and gardening associations. The fact that the National Export Strategy is Agriculture biased explains why the views of the farmers are deemed important to the extent that over 250 farmers were consulted across the seven administrative regions of the country. While the information gathered from the consultations were mostly similar, there were some concerns and challenges that were peculiar to some regions. From the consultative engagements with the farmers the common underlying challenges are:

- (i) High cost of agricultural inputs like fertilizers, seeds, & farming equipments
- (ii) Inadequate agricultural extension services and workers
- (iii) Inadequate patrol of Gambian waters and illegal fishing by foreign trawlers
- (iv) Late start of the groundnut marketing season: 4 – 6 months after harvest
- (v) Inadequate marketing outlets for agricultural produce
- (vi) Market access challenges due to distance from farm gates to most feeder and trunk roads
- (vii) High transportation costs to haul agricultural produce from farm gates to markets

- (viii) Inadequate and in parts of some regions lack of warehousing facilities for storage and preservation of farm produce
- (ix) Inadequate auditing of cooperative schemes
- (x) Low pricing of farm produce
- (xi) Inadequate and in parts of some regions lack of cooperative marketing schemes which traditionally assist farmers with market access, farm inputs, and soft loans, especially at the beginning of the planting season
- (xii) High interest rates charged on village loan schemes, which are intended to be concessionary
- (xiii) Limited access to credit
- (xiv) Inadequate agro processing activities which could have helped with challenges of product marketing
- (xv) Post harvest losses due to lack of storage for agriculture produce and refrigeration for farm produce
- (xvi) Infrastructure challenges with fish landing sites across the country
- (xvii) Over dependence on rain-fed agriculture

During the consultative regional meetings the following recommendations were made by the farmers:

- (i) Revitalize the Cooperative scheme **but** administered by Private Business
- (ii) Develop irrigation farming schemes especially in the Central River Region
- (iii) Navy in collaboration with the Department of Fisheries to stop illegal fishing activities engaged in by foreign owned vessels and overfishing activities engaged in by licensed foreign owned vessels
- (iv) Introduce competition in the retail of fishing boat engines as this is dominated by a sole importer which makes boat engines very expensive
- (v) Re-introduce farmer advisory services on expected rainfall and rainfall patterns for better planning of farming activities
- (vi) Encourage processing of agricultural produce to create the requisite market for farmers and better prices on their agricultural produce
- (vii) Ensure an early start of the groundnut marketing season
- (viii) Enforce auditing of cooperatives as this has proven to be a deterrent of corrupt practices within cooperatives
- (ix) Resuscitate the activities of the Basse Ginnery Plant and also expand cotton production
- (x) Strengthen the activities of the Farmer Associations
- (xi) Encourage private businesses to provide agricultural goods and services such as farm inputs and tilling services.

Consultative engagements with businesses within the Kanifing and Banjul Municipalities highlighted the following:

- (i) Business competitiveness is constrained by the level of duties/taxes on imports. The levied import duties/taxes are broken down as follows:
  - 15% Sales Tax (would eventually be replaced by VAT)
  - 10% Import Duty on Semi Finished Products
  - 5% Import Duty on Primary Commodities (Products)

- 0.5% ECOWAS Levy
- 1.55% Processing Fee

Businesses that export to Senegal also pay:

- 2% of Customs Processing Fees levied in Senegal

(ii) On the general economic environment, businesses raised the following concerns:

- High utility tariffs – in particular with electricity – which impacts negatively in promoting industrialization
- High reconnection fees charged by NAWEC to industries– currently GMD15,000.
- Non-enforcement of Property Right Laws. In particular was that of infringements on Trademarks with no recourse for the Trademark holder
- Delays in processing lease applications and the challenges with acquiring land for project expansions
- Cost of credit – lending and interest rate charges by the commercial banks
- Lack/low technical skills level of Gambians

(iii) An overwhelming tax burden, which includes:

- Corporate Income Tax (32%) or Turnover Tax (2%)
- Sales Tax (15%)
- Excise Tax (5%) on ex-factory price - for producing an excisable good
- Fuel Tax (Inclusive in pump price)
- Capital Gains Tax (10% of Sales Price or 2% of Capital Gains – the higher of the 2)
- Environment Tax (GMD1 flat per employee per month)
- Property Tax (0.3%)
- Payroll Tax – GMD10,000 ECOWAS Citizens
- Expatriate Tax – GMD40,000 Non-ECOWAS Citizens
- Withholding Tax for Royalties – 15%
- Vehicle Tax (Fixed Fee)
- Fringe Benefits Tax (35% on employee contributions)
- Injuries Compensation (1% - maximum is GMD15 per employee per month)
- Municipal Business License (varies)
- Social Security Contributions (10% of Gross Salary)
- National Education Levy (GMD30,000 – GMD50,000)
- Business Registration (Fixed Rate)
- Stamp Duty (2.5% - 10% of Contract Value)

It was recommended by the business community for the Government to review the above challenges in efforts to help improve the business environment.

## PRIORITY AREAS OF THE NES

In answering the above three questions and using the above criteria, the following sectors, sub-sectors, and cross-cutting sub-sectors were deemed to be appropriate to be included in the NES:

1. The Groundnut sub-sector
2. Cashew
3. Fisheries
4. Horticulture
5. Tourism
6. Manufacturing
7. Re-exports

### CROSS-CUTTING AREAS:

1. Transportation & Trade Facilitation
2. Telecommunications
3. Financial Services
4. Human Resource Development
5. Research & Development

## SITUATIONAL ANALYSIS OF THE PRIORITY SECTORS

### GROUNDNUTS

Out of a total area of 558,000 hectares of arable land devoted to agricultural production, 100,000 to 150,000 hectares (33% to 50%) are devoted to groundnut production (FAOSTAT 2011). Groundnut exports contribute significantly to foreign exchange earnings and account for 70% percent of domestic exports ([www.indexmundi.com](http://www.indexmundi.com)) and contributes about 7% of the country's Gross Domestic Product. It also contributes significantly towards food security, poverty reduction, and livestock feed and is a key anchor of other economic activities.

Since the 1980s groundnut exports have declined as a result of adverse climatic conditions, in-country marketing challenges, fluctuating world market price, and low quality nuts due to poor handling & post harvest practices. Government interventions in the sector – provision of farm inputs on credit basis and subsidy to producers – were widely criticized and blamed for the poor performance of the sector. Efforts targeted at revitalizing the sector identified the need to commercialize the sector. In 1993 the industrial assets were privatized bringing to an end the Government subsidy scheme and allowing private sector players to take-over the marketing and export of the cash crop. In the immediate years following privatization, the sector enjoyed adequate crop finance, an effective marketing, improved maintenance and investment in industry assets, and an enhanced contribution to research funding. However, in 1999 Government revised its privatization decision and managed the sub-sector until 2003 when it finally withdrew from the marketing of the cash crop. Exports collapsed in 2004 to USD 9.6 million compared to



USD49 million in 1975. The collapse in export earnings was largely as a result of failures in marketing arrangements.

Renewed commitments on the side of Government and its development partners have led to the formulation of an agricultural investment plan -The Gambia National Agricultural Investment Plan (GNAIP) 2011-2015. This comprehensive regional agricultural strategy, conceived under the support of ECOWAS with respect to ECOWAS member country peculiarities, seeks to revitalize the sector with a focus on ensuring increased productivity underpinned by substantive private sector participation and a commercial orientation supported by strong agricultural research and extension services.

Under the GNAIP revitalization program, development partners such as the European Union (EU), African Development Bank (AfDB), and the FAO continue to provide necessary infrastructural support to the sub-sector. From 2008 to 2010 and under the STABEX FMO 99, the EU provided the sum of EUR1.041 million to improve the processing and evacuation capacity of the Gambia Groundnut Corporation (GGC) and to upgrade Cooperative Produce Marketing Societies (CPMS). Also provided were agricultural inputs to farmers including 133 MT of decorticated groundnut seeds, 1,500 bags of fertilizer and 200 kg of seed treatment chemical worth over USD 0.33 million in support of the soaring food prices. All these interventions were aimed at making the sub-sector attractive for privatization. The above support was intended to unleash the potential that lurks in the sub-sector.

## SWOT ANALYSIS

Table 1

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Ready availability of arable land – 45% of arable land available for cultivation</li> <li>2. Favourable climatic conditions for production</li> <li>3. Inexpensive and available labour supply</li> <li>4. Favourable investment climate and incentives for agricultural investment</li> <li>5. Proximity to EU &amp; US Markets</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. Marketing challenges and inadequate financing for marketing of the cash crop</li> <li>2. Inadequate processing equipment and storage facilities.</li> <li>3. High cost of transportation from farm gate to buying &amp; processing centers</li> <li>4. High cost of farming inputs</li> <li>5. Aflatoxin, pests and disease challenges</li> <li>6. Inadequate commercial farms and predominant use of subsistence type farming techniques and practices</li> <li>7. Inadequate Research &amp; Development and limited agricultural extension services</li> <li>8. Limited and poorly organized producer organizations</li> <li>9. Ineffective cooperative schemes</li> <li>10. High Non Performing Loans in the sub-sector, which may cause banks to shy away from financing the sub-sector</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. River Gambia for irrigation</li> <li>2. River Gambia for evacuation from farm gates to processing centers</li> <li>3. Multilateral institutional support for the development of the value chain – FAO / Aid for Trade</li> <li>4. AGOA, EU Everything But Arms initiative, WA-EU EPA, and GSP export market access</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Climate Change, Ex. Sahelian drought</li> <li>2. Locust invasion</li> <li>3. Rural-urban migration</li> <li>4. Preference of farmers for other alternative cash crops – notably cashew supplemented by other annual crops.</li> <li>5. International price volatility</li> </ol>



## CASHEW

The Cashew sub-sector is a vibrant and promising sub-sector considering the economic benefits the value chain has realized over the past decade. The looming prominence of the value chain as a commercially viable crop is perhaps reflected in the leap the farm gate price has made over the past decade from GMD7 per kilo to the 2010/11 crop season price of GMD25 per kilo – an increase of 257%. Currently the acreage under cashew cultivation is estimated between 20,000 – 23,000 hectares with yields per hectare ranging from 300-500 kilograms. Overall raw cashew nut (RCN) production is estimated to range between 15,000 – 25,000 metric tons (MT). Of this production output, the existing processing capacity is only 500 MT but less than 20 MT of actual processing takes place. Processing operators include Gambia Horticultural Enterprise (GHE), Farmer Inter-trade Association, and GAM Cashew.

Though the overall production capacity of RCN is low in The Gambia, the throughput of RCN at The Gambia Ports is estimated at around 70,000 MT. The differential between the 70,000 MT throughput and the estimated 10,000 MT local production comes from neighboring Bissau and Casamance. These RCN find its way into the country primarily for two reasons – an efficient port in The Gambia and proximity of The Gambia Ports to Casamance relative to that of the Port of Dakar, Senegal.

The challenge with cashew processing, though not peculiar to The Gambia, is a challenge that needs redressing if we are to succeed in making the cashew Value Chain a successful export crop. However, for processing to be economically viable, there must be enough output of raw cashew nuts and these must be readily available. This in turn necessitates a calculated expansion either in the size of existing farms, encouragement of more farmers to enter into cashew farming, or invitation of investors into commercial cashew farming. Also of importance is the marketing arrangement of cashew. The marketing arrangement needs to be more organized with emphasis on having farm gate prices determined by the forces of demand and supply. Issues relating to weights and measures and having standardized buying arrangements have to be dealt with. Equally, ensuring separation of nuts into their respective quality designations is also important. This is essential considering that the different varieties of cashew in the Gambia – about 22 in total. The best mother trees, as recommended by the Africa Cashew Alliance (ACA) needs to be protected to ensure they are not eventually replaced by lower quality varieties. For this to happen there is need for the establishment of a Cashew Research & Development unit beyond what obtains at the National Agricultural Research Institute.

## SWOT ANALYSIS

*Table 2*

STRENGTHS	WEAKNESSES
<ol style="list-style-type: none"> <li>1. 24 hours Port operations service with quick turn-around time on throughput shipments</li> <li>2. High quality local crop variety with good resistance to diseases</li> <li>3. Proximity to the EU and US market</li> </ol>	<ol style="list-style-type: none"> <li>1. Lack of R&amp;D in cashew</li> <li>2. High fuel &amp; electricity cost</li> <li>3. Numerous check points which impede the Transit &amp; Exports of RCN</li> <li>4. Lack of a national &amp; accredited certification body for compliance with standards in food processing</li> <li>5. High corporate tax (32%) and multiplicity of Municipality taxes</li> <li>6. High interest rates (17% – 30%) and other charges</li> <li>7. Low skills in processing and best cropping practices</li> <li>8. Periodic Ferry inefficiencies and delays</li> </ol>

OPPORTUNITIES	THREATS
<ol style="list-style-type: none"> <li>1. Growing world demand for cashew</li> <li>2. Major growers such as India and Brazil are becoming net importers of processed cashew thereby presenting opportunities for processed cashew from The Gambia</li> <li>3. Proximity to the EU and US markets</li> <li>4. Decreasing production levels in the major producing nations of Brazil, Vietnam, and India</li> <li>5. Existence of a Gambia Standards Bureau</li> <li>6. Provision for creation of a National Steering Committee to facilitate cashew value chain initiatives</li> </ol>	<ol style="list-style-type: none"> <li>1. Port of Bissau improving on its efficiency thus making it more attractive to export from Bissau</li> <li>2. Periodic closure of the Senegal-Gambia border</li> <li>3. Proposal of Zinguinchor Port being dredged to make it more attractive</li> <li>4. Non-compliance with ECOWAS Protocols, specifically Free Movement of Goods and Persons</li> </ol>

## FISHERIES

The Gambia is one of Africa's smallest coastal states with a coastline of about 80 km, bordered on three sides by the Republic of Senegal and on the west by the Atlantic Ocean. It is located in the highly productive up-welling zone of the Atlantic Ocean and the Canary Current Large Marine Ecosystem (CCLME) region. The productivity of the marine and estuarine waters within the jurisdiction of the country is further enhanced by the huge annual influxes of nutrients from the river, fringed with mangroves on both sides up to hundred kilometers or more. The fisheries sector of The Gambia is distinctly classified into two sub-sectors based on the types of operations. These are:

- The artisanal sub-sector
- The industrial sub-sector

The activities of the artisanal fisheries sub-sector are widely dispersed throughout the country and can better be described as a low cost and labor intensive sub-sector that employs both motorized and non-motorized crafts in their operations. These operations involve the use of less complicated fishing gears, methods and techniques. It is estimated that the artisanal sub-sector provides direct and indirect employment for about 30,000 people. Unlike the artisanal sub-sector, the activities of the industrial fisheries sub-sector are generally concentrated within the marine coast and greater Banjul Area. The key stakeholders of the industrial sub-sector are commercial fishing vessels and fish processing establishments. Their operations are characterized as capital intensive involving the use of modern and sophisticated equipment for fishing and fish handling, processing and other related activities.

A number of economic, social, institutional, physical and technical constraints are impeding the sustainable development, growth and management of the fisheries and aquaculture sectors. These constraints include: poor governance and management, inadequate scientific information for informed decision making, inadequate infrastructure, limited control over fishery resources, poor management, low level of aquaculture development, low level of regional trade in fish and fishery products, inadequate skilled manpower, and inadequate investment in the sector.

## SWOT ANALYSIS

Table 3

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Location – The Gambia is located in a highly productive up-welling zone rich in diverse fish species</li> <li>2. Abundance of pelagic fish resources</li> <li>3. Proximity to major trading partners – the EU &amp; US Markets</li> <li>4. River Gambia for fresh water fish farming – Aquaculture</li> <li>5. Continental shelf of 4000 square kilometers with a 200 nautical mile Exclusive Economic Zone (EEZ)</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. Inadequate infrastructure for improved fish handling and processing – Cold storage facilities, Landing sites, Smoke houses , and Drying platforms</li> <li>2. Inadequate technical and scientific expertise to ensure conformity with Industry Standards</li> <li>3. Inability to adequately implement Sanitary and Phytosanitary (SPS) measures to ensure sustained market access.</li> <li>4. Weak Management and its attendant challenges of access and cost of credit; poor development of fisheries associations and Community Based Organizations (CBOs).</li> <li>5. Inability to effectively implement the Fisheries Legislation</li> <li>6. High cost of inputs – Fuel, Fishing nets, Equipment, Boat Engines</li> <li>7. Fragmented value chain</li> <li>8. Low level of Gambian participation in the sector</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. Existence of Fisheries Legislation &amp; Fisheries regarded as a Priority Investment Area by Government with attractive Investment Incentives</li> <li>2. Replication of Pilot Projects of Community Fisheries Centres (CFCs)</li> <li>3. Aquaculture – The halving of the country into 2 by the River Gambia provides for fresh water fish across the country</li> <li>4. Membership and signatory to major sub-regional, regional and international Fisheries protocols</li> <li>5. Bilateral Co-operations</li> <li>6. The Gambia Food Safety &amp; Quality Authority for implementation of SPS measures</li> <li>7. Existence of an accredited microbiological lab for food testing</li> <li>8. Completion of the construction of the Fishing Port for landing of fish in relation to signed bilateral fishing agreements with Senegal</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Climate change</li> <li>2. Depletion of fish stocks through illegal, un-regulated and un-reported fishing activities</li> <li>3. Destruction of the marine eco-system &amp; biodiversity due to trawl fishing &amp; over fishing</li> <li>4. Export Bans, sanctions, and trade restrictions for reasons of Sanitation and non-compliance with international standards &amp; protocols</li> </ol>

## HORTICULTURE

An important sub-sector within the Agricultural sector, horticulture plays a key role in the livelihood of Gambians, especially that of women. It is estimated that the sub-sector accounts for about 65% of the agricultural labour force with a GDP contribution of about 4%. Considering that the Agricultural sector accounts for about 70% of employment in The Gambia with an estimated contribution to GDP of 30%, it is evident that the horticultural sub-sector is a formidable employer within the Agricultural sector and is in dire need of improvement in terms of its productivity and contribution to GDP. The importance of horticulture is also evident in the contribution it makes to national food security, sustenance, and poverty alleviation and to household incomes, especially those of rural and peri-urban dwellers.

Horticultural activities in The Gambia are largely seasonal with off-season (dry-season) activities that lasts from November-June subjected to some degree of small scale irrigation made possible by dug-out wells. Horticultural outputs during the rainy season are usually of a low quality compared to those produced during the dry season. The horticultural sub-sector is dominated by individual subsistence farmers and communal horticultural activities with limited commercialized horticultural players. The few commercial players include Gambia Horticultural Enterprise, Radville Farms, Kharafi Farms, and Gambia Is Good (Concern Universal). Despite the estimated 285,000 (two hundred and eighty-five thousand) hectares of arable land available for agricultural activities no available statistic can validate the area used for horticultural activities and commercial horticultural activities are estimated to account for less than one thousand hectares and their primary focus is on production of fruits – notably mangoes and citrus.

### SWOT ANALYSIS

Table 4

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Land availability</li> <li>2. Proximity to the EU</li> <li>3. The River Gambia for transportation</li> <li>4. Ready availability of labour supply</li> <li>5. Availability of underground water</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. High inputs and logistics costs – seeds, fertilizers, electricity</li> <li>2. Inadequate cold storage facilities, market access, packaging, and processing</li> <li>3. Inadequate financing opportunities &amp; high interest cost</li> <li>4. Inadequate agricultural extension services</li> <li>5. Limited specialization in extension services</li> <li>6. Logistical challenges of ready air and sea freight availability</li> <li>7. Lack of reefer transport facilities</li> <li>8. Limited use of weights &amp; measures &amp; calibration challenges</li> <li>9. Unfavourable land tenure system for financing</li> <li>10. High &amp; peculiar incidence of pests &amp; diseases</li> <li>11. Periodic Ferry inefficiencies and delays</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. Certification of businesses for enhanced market access</li> <li>2. Sector diversification into other horticultural products</li> <li>3. Improvement in standards and quality infrastructure</li> <li>4. Facilitation of private sector led cooperative schemes</li> <li>5. Agro-processing</li> <li>6. Inter-linkage with Tourism industry</li> <li>7. The River Gambia for transportation</li> <li>8. Commercialized Horticulture for exports</li> <li>9. Packaging and processing</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Global Warming and climate change</li> <li>2. Pests and disease – also occasional invasion of locusts from the Sahara</li> <li>3. Price volatility</li> <li>4. Rural-urban migration</li> <li>5. Non tariff barriers on exports – specifically Sanitary &amp; Phytosanitary (SPS) measures</li> </ol>

## TOURISM

Tourism remains a crucial contributor to national output. It is estimated that the Tourism sub-sector contributes 12% - 15% of GDP and is the major foreign exchange earner. Foreign exchange earnings grew from a little over 20% in 1982 to around 40% by 1991; it now stands at around 30%. Tourist arrivals are dominated by the UK Market (45% - 55%) followed by Scandinavia (7% - 11%), the Dutch Market (9%) and recently the African Market (6%), which is dominated by Nigeria. The country's main attraction has been the traditional sun, sea, and sand beaches with its rich traditional and cultural heritage.

The former Gambia Tourism Authority (now Gambia Tourism Board) beginning in 2005 embarked on an international campaign to lure high spending tourists into the country. Though this endeavour of the Government is plausible, for the benefits of Tourism to be realized the Government must continue to improve the requisite infrastructural support to facilitate and ensure further development of the sub-sector.

The unique characteristics of The Gambia which makes it an attractive destination include its rich cultural heritage, the peace and tranquility of the country, its friendly population, the year round availability of the traditional sun, white sandy beaches and the sea along with the navigable River Gambia and an ecosystem that offers numerous bird species for bird watching. The proximity of the country to Europe and relatively better value for money facilities are other advantages of the destination

## SWOT ANALYSIS

Table 5

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Location – Proximity to Europe</li> <li>2. Political Stability</li> <li>3. Existence of a hotel accreditation &amp; standards body.</li> <li>4. Natural &amp; pristine eco-system</li> <li>5. English-speaking nation</li> <li>6. Dedicated Tourism Development Areas</li> <li>7. International reputation as a relatively safe and friendly destination – Smiling Coast of Africa.</li> <li>8. Home to Cultural Heritage Sites</li> <li>9. Agrarian based society – high quality food based on local organic produce.</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. Seasonality of the Industry</li> <li>2. Limited diversification in products</li> <li>3. Limited inter-linkages between the tourism industry and the economy</li> <li>4. High cost of electricity</li> <li>5. Dependence on limited scheduled and charter flights</li> <li>6. High refueling costs (Aviation fuel)</li> <li>7. Inadequate duty free facilities at the airport</li> <li>8. Existence of illegal accommodation operators – motels and guest houses – in the informal hotel sector denying Government of tourism income</li> <li>9. Low service standards</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. Underutilized coastal space for recreation – development of Cultural and Eco-Tourism</li> <li>2. Conference Tourism</li> <li>3. The River Gambia – utilizing this resource for its natural beauty.</li> <li>4. Regain lost markets – German, Scandinavian. Explore New markets given recession in Europe</li> <li>5. Forward and backward linkages between Agriculture and Tourism</li> <li>6. Rural and Domestic Tourism</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Competition from other Tourism Destinations – notably Cape Verde, the Mediterranean, Caribbean, and East Africa</li> <li>2. 'Bumster' menace – harassment of tourists</li> <li>3. Pedophilia</li> <li>4. Sex tourism</li> <li>5. Expansion of low-cost airlines to closer destinations to Europe – Mediterranean</li> <li>6. Overdependence of the industry on tour operators.</li> <li>7. Environmental and land degradation</li> </ol>

## MANUFACTURING

It is estimated that the Manufacturing sector contributes 5% to GDP and employs about 4,500 people. The contribution of the Manufacturing Sector to the Industrial Sector highlights its importance. Manufacturing activities in The Gambia are dominated by light manufacturing with no activity in high technology or heavy manufacturing activities. Within light manufacturing, economic activities are dominated by clothing & textiles, food & beverages, metals & metallic works, wood & leather, and chemicals, which primarily are in the areas of soaps and plastics. A World Bank survey undertaken in 2006 to determine the constraints to growth (WB Investment Climate Assessment) interviewed some 174 firms, some of whom operate within the manufacturing sub-sector. Out of those surveyed, 80% ranked the cost and availability of electricity as the major challenge constraining economic growth. Access to Credit was ranked as the second biggest challenge (38%) with land access (25%), taxation (25%), and anticompetitive practices (21%) ranked the third, fourth, and fifth most challenges, respectively, constraining the growth of the economy.

The manufacturing sub-sector faces formidable challenges which must be overcome if manufacturing should contribute meaningfully to the economic development aspirations of the country. This is essentially critical if we consider the ambitions of the Programme for Accelerated Growth and Employment – which cannot be achieved without a meaningful contribution from the manufacturing sub-sector.

Among these challenges are the lack of technical competencies – Electrical Engineers, Manufacturing specialists (soap, steel, gas etc), and Science & Technology specialists – to cater to the varying needs of the sub-sector. It is for this reason that services for manufacturing activity in The Gambia is dominated by foreigners, especially those from neighboring Senegal. Sub-regional initiatives of the ECOWAS Protocol – notably the ECOWAS Trade Liberalization Scheme – is fraught with challenges of member states not honoring the protocols of free movement of goods, lack of awareness, and cumbersome application process. These challenges and those of the Inter-state Road Transit (ISRT) have made it tough for manufacturing businesses to leverage the much bigger ECOWAS Market. As such, other constraints to the Sub-sector – high taxes and high electricity costs – hampers the degree of competitiveness of the sub-sector. In this vein, both the contributions of the sub-sector to GDP and employment are in need of improvement.

## SWOT ANALYSIS

*Table 6*

STRENGTHS	WEAKNESSES
<ol style="list-style-type: none"> <li>1. Member of ECOWAS trade block – a market of over 280 million people</li> <li>2. Proximity to EU and US markets</li> <li>3. English speaking country – Official Language</li> <li>4. Existence of Gambia Standards Bureau</li> </ol>	<ol style="list-style-type: none"> <li>1. Cumbersome cargo clearance procedures</li> <li>2. Numerous check points which impedes the Transit Trade - Export and Re-exports</li> <li>3. Lack of conformity assessment services to ensure compliance with international standards</li> <li>4. High corporate tax (32%) and multiplicity of Local Government &amp; Municipality taxes</li> <li>5. High fuel &amp; electricity cost</li> <li>6. High lending interest rates by banks to businesses (17 – 30% rates of interest)</li> <li>7. Inadequate skilled labour</li> <li>8. Non enforcement of Intellectual Property Rights – Patents and Trademarks</li> </ol>

<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. Expansion in the road infrastructure network with improved access to sub-regional markets</li> <li>2. The Gambia is an AGOA beneficiary country with ready market access</li> <li>3. WA-EU EPA signatory, which provides market access into the EU, Caribbean, Pacific, and African member countries</li> <li>4. Young population (median age is 19 years) and a trainable work force</li> </ol>	<p style="text-align: center;">9. Multiplicity of Government Taxes</p> <p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Anticompetitive industrialization practices of some of the emerging developing countries</li> <li>2. Protectionist Trade policies of some ECOWAS member countries impeding the free movement of goods.</li> </ol>
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## RE-EXPORTS

Re-exports account for as much as 30% of the country’s merchandise imports (WTO TPR, Aug. 2010). Though the country has served as the Gateway to the sub-region for over decade, this was largely due to the relatively low import duties and taxes, a well-functioning port and Customs, and the country’s strategic position amidst it neighbors. The value of Re-exports, as a percentage of imports, have declined over the years from as high as 70% of imports to the current levels of a little over 30% (2003– 2007 data).

According to the Diagnostic Trade Integrated Study (DTIS, July 2007) conducted under the Integrated Framework (IF), the Re-export trade accounts for about 80% of total exports and 20% of foreign exchange earnings.

Recent sub-regional tariff harmonization and crackdown on unofficial trade by its neighbors and other efforts by ECOWAS member countries to improve their trade competitiveness remain significant threats to the Gambia’s Re-export sector. Over the years, The Gambia has gradually been losing its competitiveness in the re-export trade to its neighboring countries. This is particularly true with Senegal, who has gained significant advantage as a result of the Union Economique et Monétaire Ouest Africaine (UEMOA). The convergent trade policies of the UEMOA, the improved liberalization of the Senegalese business environment and the improvement in Dakar Port services (International Poverty Center 2008) are also factors that have helped improve Senegal’s competitiveness relative to increased customs tariffs in The Gambia. As a result and overtime, Re-exports from The Gambia fell by 20% in 2006 following a 10% decline in 2005 (DTIS, July 2007) largely as a result of narrowing differentials in applied tariffs, improved turnaround time in customs clearance and improvement in port handling efficiencies at the Dakar Port.

For the Gambia to maintain the competitive advantage it enjoys in this sector there is need for the Government to develop and implement alternative strategies that will neutralize the effects of the recent sub-regional initiatives to stifle the re-export sector and the of the Transit Trade of the country.



## SWOT ANALYSIS

Table 7

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. 24 hours Port operations service</li> <li>2. Predictable and liberalized market environment</li> <li>3. Sociopolitical &amp; macroeconomic stability</li> <li>4. Proximity and ease of access to regional markets</li> <li>5. No requirements for Import/Export Licenses</li> <li>6. Existence of extensive trunk and feeder roads</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. Inadequate record keeping and data on the re-export trade making planning and strategy development on the sub-sector a challenge</li> <li>2. Inadequate port equipment and cargo space constraints</li> <li>3. Inadequate port financing and modern port technology</li> <li>4. Inadequate modern port technologies and systems</li> <li>5. Numerous check points which impedes the Transit and Re-export trades, Ex. along the Banjul-Basse-Badiara Transit Road</li> <li>6. Language barrier considering most re-exports are to Francophone neighboring countries</li> <li>7. Lack of implementation and enforcement of the ISRT Protocol</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. Political and macroeconomic stability to attract investment in the sub-sector</li> <li>2. Implementation of the Inter-state Road Transit (ISRT) protocol of the ECOWAS</li> <li>3. ECOWAS Market Access of over 300 million consumers</li> <li>4. Expansion of identified trunk and feeder roads</li> <li>5. Implementation of the Ports Expansion Project</li> <li>6. Implement duty free on re-exports as is the case in other countries</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Border closure challenges with Senegal</li> <li>2. ECOWAS Common External Tariff harmonization initiative</li> <li>3. Political &amp; economic instability in some sub-regional countries</li> </ol>

## TRANSPORTATION & TRADE FACILITATION

Transportation and Trade facilitation in The Gambia has remained a major challenge. A key domestic challenge is the Ferries Services between Banjul and the North Bank Region. In view of the liberal trade policies pursued by the Government, it is surprising that Transportation & Trade Facilitation has not received the commensurate support from the Government considering that Transportation and Trade Facilitation in itself is an extension of the ideals of Trade Liberalization. Defined as “The simplification and harmonization of international trade procedures” by the WTO, trade facilitation deals with **Supply Chain Management** (including ICT and logistics), **Customs Modernization, International Trade Systems, and Trade Negotiation** initiatives guided by the WTO. As such, Transportation & Trade Facilitation is a cross-cutting phenomenon with implications on Competitiveness, National Security, Trade Policy, Government Revenue, the Environment, Consumer Health, Food Safety, and Quality Infrastructure. On the issue of National Security, there is also a need to improve upon the ‘back-stacker’ scanner at the ports and replace this with a better state of the art scanner capable of capturing images beyond the current 50-60% scanning image capture. The current state of affairs, which uses manual labour as back-up to ‘back stacker’ leaves much to be desired in terms of the 4 hours turnaround time per container relative to the one minute turnaround time using state of the art scanners. Despite its cross-cutting stance, the underlying objective of Transportation & Trade Facilitation is to reduce transactions costs, which undoubtedly improves a country’s competitiveness in international trade and thus increased export flows and commensurate economic growth and development.



In the case of The Gambia, Transportation & Trade Facilitation has not realized the requisite support needed to improve the regulatory interface between the Government and businesses. Traditional Trade Facilitators – notably Customs, Ports, Shipping Lines, Shipping Agencies, Clearing Agents & Freight Forwarders, Immigration, and the Police – are perceived not to support the seamless flow of goods and services due to bureaucratic requirements and procedures, which act as a hindrance to the flow of goods and services. Instead of facilitating trade, the Customs, Immigration, Police, and Ports are mostly seen as “policing trade” and in the process impact negatively on the competitiveness of the country’s trade. In addition, trade facilitation services and capabilities provided by Information Communications Technology are not leveraged to enhance the competitiveness of the country and neither is there a focus on rewarding compliance history of businesses on customs procedures and protocols. According to the Trade Competitiveness Index (TCI) of the Economic Commission of Africa (ECA), The Gambia ranked 10<sup>th</sup> out of thirty African countries surveyed over the 5-year period of 1980-84; 16<sup>th</sup> out of thirty African countries between 1985-89; 11<sup>th</sup> out of 30 African countries between 1990-94; 12<sup>th</sup> out of thirty countries between 1995-99; and 11<sup>th</sup> out of 30 countries between 1997-2001. The Global Competitiveness Index (GCI) ranking of the World Economic Forum (WEF) ranked The Gambia in the 2010/2011 Report at an overall ranking of 90 out of 139 countries with GCI parameter rankings of 90 in **Basic Requirements**; 105 in **Efficiency Enhancers**; 64 in **Innovation & Sophistication**; 69 in **Infrastructure**; 37 in **Institutions**; 117 in **Macroeconomic Environment**; and 124 in **Health & Primary Education**.

To improve Trade Facilitation, there is need to fully implement the ratified ISRT Protocols and the MOU relating to the Bilateral Customs Administration between The Gambia and Senegal, which is premised on the Senegal – Mali MOU. Though the Government has put in place the framework – the Surety scheme and the Guarantor (GCCl) – businesses are yet to take advantage of the scheme. There is also the need to fast track the Gambia-Mali-Senegal Tri-partite MOU on the implementation of the ISRT protocol relating to the Basse-Badiara Transit Road. Equally important is the removal of the challenges impinging Transport and Trade Facilitation along the *Banjul-Basse-Badiara Transit Road* along which there are a significant number of check points. Considering the number of check points and the delays on the free flow of merchandise trade and movement of persons, it is imperative for the three countries’ Chambers of Commerce to dialogue with the objective of addressing the challenges of besetting the implementation of the ISRT. Equally, the governments of the three countries must demonstrate the will power to implement the protocols of the ISRT rather it being impeded by revenue shortfall considerations.

Other issues to contend with relate to the Transit Trade and these include administration of Custom Duties; Security and Immigration at customs and border posts; Port Service charges and Government taxes; numerous checkpoints instituted by Police, Immigration, and Municipal Authorities – these are often deemed to be unnecessary as all trucks loaded with goods are issued with MANIFESTS and assured by Customs; restriction in the movement of transit trucks beyond 19:00 hours – a security legislation in The Gambia; inadequate and inappropriate transport fleet used for the Transit and Re-export trade; and inadequate Gambian owned Transportation businesses.

To improve our competitiveness as a trading nation it is imperative to undertake the following:

- improve upon the turn-around time at the ports
- undertake further investments to expand the ports
- improve on our efficiency and work ethics
- expand the container terminal
- procure additional cargo handling equipment
- extend the Berth area of the Ports to accommodate larger vessels
- complete the pavement of the Bond Road to allow for ease of access to the Greater Banjul Area and beyond
- Extend better incentives on cargo handling tariffs for both the Transit and Transshipment Trades to encourage greater throughput volumes
- Deepen the Banjul Access Channel from 8.5 meters to 10.5 meters to enable access for larger vessels

### SWOT ANALYSIS

Table 8

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Liberalized economic environment</li> <li>2. Signatory to the ISRT Protocol (1982)</li> <li>3. 24 Hours Ports operation services</li> <li>4. Existence of extensive trunk and feeder roads</li> <li>5. Transparent Customs valuation procedures made possible by ASYCUDA ++</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. Cumbersome and inconsistent cargo clearance procedures</li> <li>2. Numerous check points which impedes the Transit Trade and Exports &amp; Re-exports</li> <li>3. Old Transportation fleet that do not meet ISRT Protocol requirement of using containerized trucks for interstate trade</li> <li>4. Lack of Export Processing Zone facilities such as bonded warehousing, bulk breaking, and sorting facilities to meet trade facilitation needs</li> <li>5. Time restrictions on transit trade truck movements – no movement allowed beyond 7 pm.</li> <li>6. Border practices inconsistent with the provisions of ECOWAS Protocol on Free Movement of Goods and Persons</li> <li>7. Scanning costs of cargo/containers</li> <li>8. Small Berth area of the Ports</li> <li>9. Lack of information Management Information Systems in Trade Facilitation</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. Port expansion &amp; use of Bund Road area for warehousing and Bulk-breaking (re-packaging)</li> <li>2. Dredging of the Port area to allow for larger vessels</li> <li>3. Implementation of the ACE Project, which has now been signed</li> <li>4. Investment in Trucking &amp; Haulage</li> <li>5. Implementation of the West African Regional Communication &amp; Infrastructure Project</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Sub-regional ambition of most of ECOWAS member countries to become the Trade Gateway of West Africa</li> <li>2. Increase in cargo handling charges</li> <li>3. Implementation of the CET</li> <li>4. Proposed Gambia Maritime Administration (GMA) Freight Levy on certain goods</li> </ol>

## TELECOMMUNICATIONS

Telecommunications remain among the most viable industries in The Gambia. Prior to the entry of AFRICELL, COMIUM, and QCELL, the industry had GAMTEL and GAMCEL as its sole players. Much development has taken place since the three players joined the industry. The market penetration rate as at 2010 is 93% for mobile services; 3% for fixed line services; and 8% for internet services. As per the 2007 Public Utilities Regulatory Authority (PURA), there are about 1 million voice subscribers in The Gambia of which 800,371 are mobile subscribers and 48,000 fixed line subscribers. Subscription to telecommunication services is estimated to have grown by 86% in 2007 relative to 73% in 2006. Tele-density, a measure of telephone penetration of the population (both mobile and fixed lines), is estimated to have grown by 18.4% in 2005; 21.59% in 2006; and 54.47% in 2007. The total volume of call traffic for 2007 was 583 million minutes of which 370.6 million minutes were domestic traffic and 209.6 million were international traffic with an interconnection traffic of 140 million minutes.

The mobile industry is expected to play an important role in the development aspirations of the country. It is evident that Vision 2020 has plans for the telecommunications industry to facilitate the promotion of a well-informed and self-reliant population. Example of such plans includes the multiplication, diversification, and decentralization of the media and the integration of the country into the Global Information Infrastructure (GII) via the super-information highway. It is expected that this would render the country a major data processing and training centre. The existing telecommunications infrastructure is in dire need of upgrade considering network overload challenges. Although the ACE Project would address some of the infrastructural challenges, realizing the opportunities that would be provided by the ACE Project warrant that we look beyond the laying of fiber-optic cables and create opportunities in Data Processing, Disaster Recovery, and Call Centers.

The telecommunications industry is currently dominated by GSM operators and information service technology (IST) providers offering wide and local area network service solutions. In their current state, the ICT physical infrastructure is in need of refurbishment. This ICT infrastructure are further constrained by over capacity challenges, the inferior IT platforms of some of the GSM service providers, recurrent satellite signal interruptions, power outages, and limited coverage of fiber optic cable networks. Given these constraints, there is an urgent need for investments in the IT sector. Notwithstanding the recent ACE Project, two types of investments are needed in the telecommunications sub-sector. The first type of investment derives from challenges relating to sunk costs. The capital-intensive nature of telecommunications and its sensitivity to concerns of national security makes it necessary for sunk cost investments to be borne by the Government and not by private sector players. With the ACE Project underway, the sunk cost investments of Fiber optics cable would be addressed leaving the sunk cost element of satellite technology. The second type of investment needed in the telecommunications sector must be borne by players within the telecommunications industry.

## SWOT ANALYSIS

Table 9

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Existence of a National Information &amp; Communications Infrastructure Policy</li> <li>2. Competitive industry – ISP &amp; GSM services</li> <li>3. Politically stable &amp; English speaking country</li> <li>4. High penetration rate of mobile service</li> <li>5. Existence of a Public Utilities Regulatory Authority</li> <li>6. Relatively widespread internet usage</li> <li>7. GMT Time zone</li> <li>8. Signatory to international telecommunications protocols</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. One international gateway</li> <li>2. Poor physical infrastructure</li> <li>3. Small &amp; low income population</li> <li>4. Low literacy rate</li> <li>5. Inadequate technical skills</li> <li>6. Poor internet coverage in rural areas</li> <li>7. Unreliable internet services</li> <li>8. Inadequate national cyber security</li> <li>9. Prohibitive price of bandwidth</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. Young population</li> <li>2. Availability and access to new technology.</li> <li>3. Potential efficiencies gained from liberalization of the telecommunications gateway once the ACE project is complete</li> <li>4. New Telecommunications &amp; ICT Act – VoIP internet telephony</li> <li>5. ICT solution delivery in Tourism, Banking, Port Operations, Customs &amp; Trade Facilitation, and Payment systems</li> <li>6. ECOWAN Wide Area Network sub-regional Project for improved wireless telephony &amp; communication</li> <li>7. GMT Time Zone which provides for Call Center opportunities given ACE Project</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Slow adoption of new technologies</li> <li>2. Non enforcement of Intellectual Property Rights – Patents and Trademarks</li> <li>3. Over protection of the Gateway for National security concerns and the impact on advancement of the industry</li> <li>4. Reliance on SAT 3 – existing vulnerable cable infrastructure</li> </ol>

## FINANCIAL SERVICES

The financial sector in The Gambia comprises of commercial banks, foreign exchange bureaus, microfinance institutions, community based savings associations (VISACAS), and insurance companies with the Central Bank of The Gambia as the apex regulatory body. The Services sector is the dominant sector of the economy contributing about 55% of the economy's GDP. The intermediation role played by the financial sector in facilitating both domestic and foreign trade over the years and the liberalized nature of the financial sector is what has prompted the pronouncement of transforming The Gambia into a Financial Centre in Vision 2020. However, financial intermediation in The Gambia remains skeletal and representative of intermediation at the most basic level. In The Gambia, the intermediation process that brings suppliers and users of funds provides a very limited framework through which to effect intermediation; this is provided by the commercial banks and to a very limited scale insurance companies. This leaves some gap to be filled by savings and loans institutions, pension funds, credit unions, mortgage and loan associations, venture capital, and other financial bodies like agricultural banks, investment banks, and merchant banks. Equally, our financial services are limited to those of a money market, a foreign exchange market, and an insurance market leaving a void to be filled by a capital market, a commodities market, a mortgage market, and a reinsurance market. Though an audacious pronouncement, Vision 2020 acknowledges that to transform the Financial sector the current supervisory and legislative framework underlying the financial industry would have to be improved.

The vacuum in the financial services sector handicaps the financial intermediation process and limits the level of financial intermediation to interactions among individuals, businesses, the Government along with the CBG and commercial banks. This limitation makes it impossible to have a wider array of intermediation activities, which could be between the financial institutions and the capital markets, Government and the capital markets, or businesses and the capital markets.

The domination of the financial sector by thirteen commercial banks of which only two are international; one regional; and the rest sub-regional leaves much to be desired if the country is to realize its goal of becoming a regional financial center. Despite the number of commercial banks operating in the country, interest rates remain prohibitively high despite the gradual reduction in the Required Reserve Ratio (RRR) of the Central Bank over the years from 16% (2007) to 14% (2008) and now 12% (2011). While the reduction in the RRR of the Central Bank has left the banks awash with excess liquidity, the un-lending of this excess liquidity to businesses has remained a challenge given that financial record keeping by businesses and auditing of their accounts remains a formidable challenge. For this reason access to financing remains a challenge with interest rate spreads as high as 15% relative to 7% at banks in other countries (The Gambia IMF Country Report, #07/126 March 2007, pg. 20) with comparable balance sheet size to those operating in The Gambia. For the above reasons most of the commercial banks engage in destructive competition practices as they compete for the same business and in the process compromise on prudent lending, and as a result the number of non-performing loans (NPLs), the rates of default on repayments, and the number of landed collateral on liquidation in the market is on the increase. It is therefore important for the Central Bank and the Commercial banks to continue to intensify and improve on their risk assessment framework.

## SWOT ANALYSIS

Table 10

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Liberalized, stable, and conducive business environment</li> <li>2. Vigilant oversight and supervision by the Central Bank</li> <li>3. Sound banking industry with strong performance indicators.</li> <li>4. Strong presence of sub-regional banks</li> <li>5. Highly capitalized, profitable, and liquid Banking Industry</li> <li>6. Very competitive industry</li> <li>7. No Capital Account control</li> <li>8. Free float Exchange Rate Mechanism</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. Limited banking products &amp; services</li> <li>2. Lack of investment, mortgage, development, and agricultural banks.</li> <li>3. Lack of Stock Exchange (Stock Market)</li> <li>4. Absence of credit rating agencies and collateral registrars</li> <li>5. Low level of financial intermediation.</li> <li>6. Limited number of first class international banks</li> <li>7. Shortcomings of the Mortgage Act (1992) which makes realization on security a challenge</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. High presence of regional banks for facilitation of regional trade</li> <li>2. ECOWAS membership for larger market access</li> <li>3. Technological innovation</li> <li>4. e- banking with the upcoming Africa Coast to Europe (ACE) project</li> <li>5. Development of Call Centres &amp; Disaster Recovery Centres</li> <li>6. Development of a Stock Exchange</li> <li>7. Existence of a Credit Reference Bureau</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Exposure to exogenous shocks due to dominance of foreign banks.</li> <li>2. Limited predictability in bank policy rate.</li> <li>3. Regional competition as West African countries race to become the leading financial center</li> <li>4. Inadequate commercial arbitration and the time it takes to receive judgment against debtors</li> </ol>

## HUMAN RESOURCES DEVELOPMENT

Human Resource Development (HRD) is among the key areas recognized as critical for the realization of the 25 year development aspiration of the country – Vision 2020. The vision, which seeks to transform The Gambia into a middle income country, realizes the important role of HRD if the accelerated development objective is to be realized. To realize the accelerated growth objective, the human resource capacity must be developed to ensure that the requisite skills and human resources are available to undertake and address the challenges associated with economic development.

The Human Development Index (HDI) ranking of 2011 ranked The Gambia 168 out of 192 countries. The availability of skilled human resources is one of the prerequisites for a competitive and sustainable economy. Though the Government is a major employer of highly skilled and educated manpower, it recognizes that among the greatest challenges to the country's development efforts is the severe dearth of human resources with the requisite know-how to propel this country forward. Substantial private sector investments in the educational sector are yet to be realized and most of the higher learning institutions operate on small a scale.

In pursuance of a competitive, vibrant and sustainable industrial sector, additional efforts must be undertaken by Government and private sector participants to develop the human resource base of the country. Though our national development plan outlines the need for private sector led development, human resource development must be spearheaded by the Government with support from the private sector.

The human resource base of The Gambia, like in most developing countries, has demand and supply side constraints. The public, private, and the informal sectors demand for educated, trained and skilled work force outweigh the supply. The University of The Gambia and a couple of non-degree professional training institutions are the main sources of trained workforce. Education policies are designed by the Ministry of Basic and Secondary Education (MoBSE) for elementary and secondary education whilst Ministry of Higher Education Research Science and Technology (MOHERST) design policies for tertiary education. The tertiary education institutions are regulated by a Government established regulatory institution – the National Training Authority (NTA).

The development of the urgently needed human resource skills require shared investment from both the Government and the private sector. In this vein and in consonance with Public Private Partnership (PPP) initiatives, private, Government and bilateral initiatives should continue to support human resource capacity expansion. HR capacity development schemes such as the American International University and the Public Service Reform (PSR) and Institutional Capacity Development Project (ICDP) should be replicated across the HR capacity constrained sectors.

The existence of a national Education Policy and an Employment Action Plan is positive and a good starting point. However, there is need to develop an integrated Human Resources Development strategy with the objective of comprehensively addressing the human resource needs of the country. The dominance of the demographic composition of the country by youths – 60% of the population is below 24 years (40% less than 15 years and 20% between 15 to 24 years) – is an advantage that needs to be leveraged.



## SWOT ANALYSIS

Table 11

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>1. Existence of a HRD infrastructure – The National Training Authority, GTTI, UTG, amongst others</li> <li>2. Government scholarship programs for tertiary education capacity building</li> <li>3. Young population</li> <li>4. Existence of the President’s Empowerment for Girls Education Project (PEGEP)</li> <li>5. Existence of trained personnel</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>1. Inadequate trained personnel to fill key real sector employment opportunities, especially in the hospitality and manufacturing sectors</li> <li>2. Inadequate national training programs to ensure sustainability of the needed human resources capacity</li> <li>3. Inadequate public and private sector investments in human resource development</li> <li>4. Inadequate accreditation programs for teachers at basic and secondary level schools</li> <li>5. High student/teacher ratio, which impacts negatively on quality of education at basic and secondary level schools</li> <li>6. Proliferation of tertiary level training institutions that are not effectively regulated</li> <li>7. Lack of policy to promote the matching of the requisite skills needed by the country to institutional skills training</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>1. A young population – over 60% of the population is under 24 years of age</li> <li>2. Technical Vocational Education Training (TVET) in Ndemban</li> <li>3. Existence of a National Employment Policy</li> <li>4. Existence of Math &amp; Science program (UNESCO)</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>1. Brain Drain challenges</li> <li>2. High attrition and job turnover rates in institutions and places of work</li> <li>3. Preference for white-collar work over blue-collar work resulting in challenges in developing technical competencies in the sciences</li> <li>4. Overconcentration of economic activity in the informal sector making it challenging to develop and representative HRD policy to address human resource needs of the country</li> </ol>

## RESEARCH & DEVELOPMENT

Research and Development activities in The Gambia date as far back as the colonial period. During this period, there existed mix farming centers in different parts of the country where agricultural research activities were carried out. It was during this period that the Medical Research Council was established in The Gambia for the conduct of health research. These R&D structures still exist. The Government of The Gambia after independence realized the importance of developing the research sector, especially in agriculture, if it is to achieve the desired socioeconomic development. It was for this realization that the National Agricultural Research Institute (NARI) was established in 1984 to carry out agricultural research whilst Extension Services are carried out by Mixed Farming Centers or what is today District Level Development Centers (DLDC).

The establishment of the University of The Gambia in 1999 is also an endeavour undertaken by the Government to further strengthen research, which is one of the core mandates of the University. Since its inception, various Departments and Faculties within the University have undertaken different research initiatives. However, these research findings have limited reach with minimal impact on policy.

Whilst the country has made some strides in the area of R&D, more needs to be done in this area. The establishment of the University as a potential power house for the production and dissemination of knowledge is a step in the right direction; however, to realize the R&D potential inherent in institutions of higher learning, financial resources must be committed to that endeavour. The increasing number of Gambian graduates returning home to contribute to the socioeconomic development of the country can be tapped. The University also attracts foreign talent, which could be leveraged to boost R&D activities in the country.

The lack of a national R&D policy poses a challenge to the country's efforts in mainstreaming R&D in the country's economic development plans. Added to this, the country has no well defined institutional structure that administers R&D matters. The Ministry of Higher Education, Research and Technology (MOHERST) has a mandate to serve as the policy arm of Government for R&D matters. However, not much progress has been realized in that endeavour. The lack of a National Research Policy and a functional institutional arrangement makes it difficult for planners to prioritize R&D in planning initiatives during bilateral budget agreements and allocations. Limitations relating to the pervasiveness of a R&D culture and the regard for knowledge leave much to be desired in terms of research undertakings and funding. The establishment of an institution pioneering R&D requires effective collaboration of all national institutions ranging from Government to non-government establishments.

## SWOT ANALYSIS

Table 12

<p><b>STRENGTHS</b></p> <ol style="list-style-type: none"> <li>Existing R&amp;D initiatives in Agriculture &amp; Medicine.</li> <li>Existing bilateral relations to support R&amp;D initiatives</li> <li>University of The Gambia – spearheading the R&amp;D initiatives of the country</li> <li>Presence of Medical Research Council</li> <li>Collaboration and co-operation in niche sectors – Health &amp; Agriculture</li> </ol>	<p><b>WEAKNESSES</b></p> <ol style="list-style-type: none"> <li>Inadequate budgetary allocation for R&amp;D</li> <li>Rapid changing technological and global markets</li> <li>Poor scientific orientation in national educational curriculums</li> <li>Absence of national R&amp;D funding and support initiatives</li> <li>Lack of a Research and Development policy</li> <li>Lack of sufficient data to inform R&amp;D strategy</li> </ol>
<p><b>OPPORTUNITIES</b></p> <ol style="list-style-type: none"> <li>Learn from the lessons of other countries -The Gambia can adopt R&amp;D framework rather than reinventing one or at most, fine-tune an already developed and operational framework from another country</li> <li>R&amp;D development assistance given LDC label</li> <li>ECOWAS R&amp;D harmonization initiative</li> <li>Increasing need for adaptive R&amp;D interventions considering developing country label</li> <li>Science, technology and Innovation Faculty at UTG</li> </ol>	<p><b>THREATS</b></p> <ol style="list-style-type: none"> <li>Reliance on donor funded R&amp;D</li> <li>Brain-drain</li> <li>Limited financial resources competing for other pressing social needs – hunger &amp; poverty eradication, maternal and child health</li> </ol>



## OVERVIEW OF EXPORT PERFORMANCE

In The Gambia, the trade sector is dominated by imports with exports accounting for slightly below 40% of total trade. Exports is dominated by Re-exports, which accounts for about 60-90% of Exports and about 30-35% of imports over the period 2003 to 2009 (WTP Review, Aug. 2010). The country is highly dependent on the Re-exports and Tourism sectors for its foreign exchange earnings. Whilst Re-exports and Tourism earnings along with overseas remittances have tended to help with the net balance in Balance of Payments (BOP), our level of oil imports and consumption have tended to result in deterioration in our BOP.

Over the years, the country's trade performance has been inconsistent with evidence of fluctuations in total trade, imports, and re-exports. Whilst total trade has increased over the years, exports have tended to be more erratic over the same period with intermittent periods of increase and decrease.

Though exports – especially Re-exports – have benefited from the country's competitiveness in port clearance costs and efficiency in terms of turnaround time, this advantage was overtime eroded by tariff harmonization policies of ECOWAS and improvement in efficiency in other competing Ports within the sub-region. It is believed, that is has resulted in a decline in merchandise trade as a proportion of GDP from over 70% in 2003 to under 50% of GDP in 2009 (WTP Review, pg.1).

It is for the above reasons, that a conscious effort is been undertaken to develop the National Export Strategy to help reverse the trend in the country's trade position and improve the country's merchandise Trade Balance, its Balance of Payments, and Terms of Trade. It is hoped that through this Strategy, the structure of output and therefore the contributions to GDP by the NES target sectors would help improve and diversify the country's export base and in the process realize some degree of industrialization.

*Box 1*

	2003	2004	2005	2006	2007	2008	2009
<b>SELECT EXPORT PARAMETERS</b>							
	In Percentage of GDP						
Merchandise Exports	27.5	24.1	17.5	16.5	14.2	10.7	11.4
Merchandise Imports	43.9	50.6	48.8	43.8	40.9	37.5	37
Net Merchandise Trade	-16.3	-26.4	-30.9	-27.2	-26.7	-26.9	-25.6
Merchandise Exports (percentage change)	7.6	4.2	16.4	3.8	8.8	5.4	1
<b>Current Account Balance</b>							
	In Million US Dollars						
Exports, f.o.b.	101	96.8	80.9	84	91.4	86.5	85.6
Groundnuts and groundnut products	9.1	16.9	2	10.2	5.8	..	..
Other domestic exports	8.4	9	5.2	7.2	6.7	..	..
Re exports	83.5	71	73.7	66.6	78.9	..	..
<b>Share of Some NES Sectors in GDP</b>							
	In Percentages						
<b>Agriculture</b>	<b>24.9</b>	<b>26.8</b>	<b>27.3</b>	<b>20.8</b>	<b>19.7</b>	<b>24.3</b>	<b>25.9</b>
Crops	12.8	16.2	16.8	10	8	12.6	14
Fishing	2.8	1.7	1.7	1.7	2.1	2.7	2.7
Industry	13.1	13.6	12.8	14.3	13.1	12	10.7
Manufacturing	5.1	5.6	6.6	6.7	6.5	5.4	5.2
<b>Services</b>	<b>52.2</b>	<b>53.2</b>	<b>54.5</b>	<b>58.6</b>	<b>60</b>	<b>58.2</b>	<b>56.7</b>
Wholesale and retail trade	10.6	25.2	23.5	26.8	28.1	25.7	23.9
Hotels and Restaurants	5.6	2.5	3.1	3.5	3.9	4	3.1
Transport, storage, and communication	17.4	11.1	12.1	11.9	11.6	9.7	9.9

Source: WTO Trade Policy Review – August 2010

Figure 2 – Current Account Balance in Millions of US Dollars

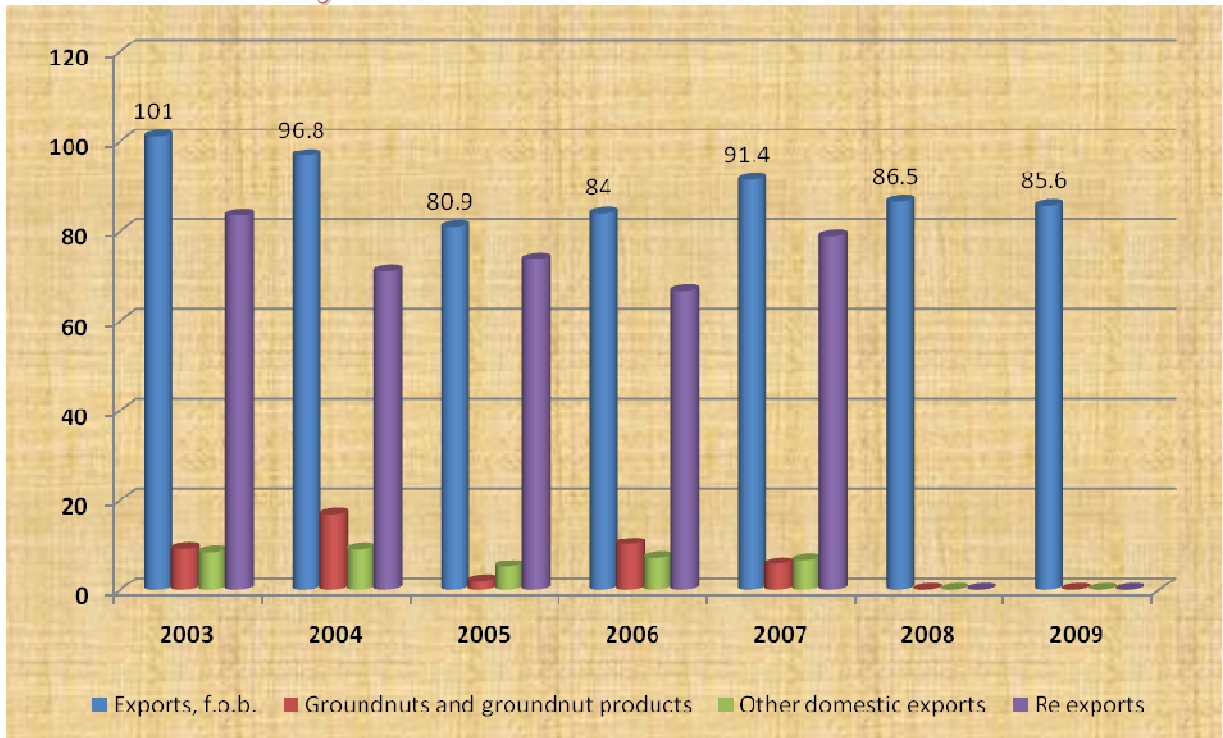
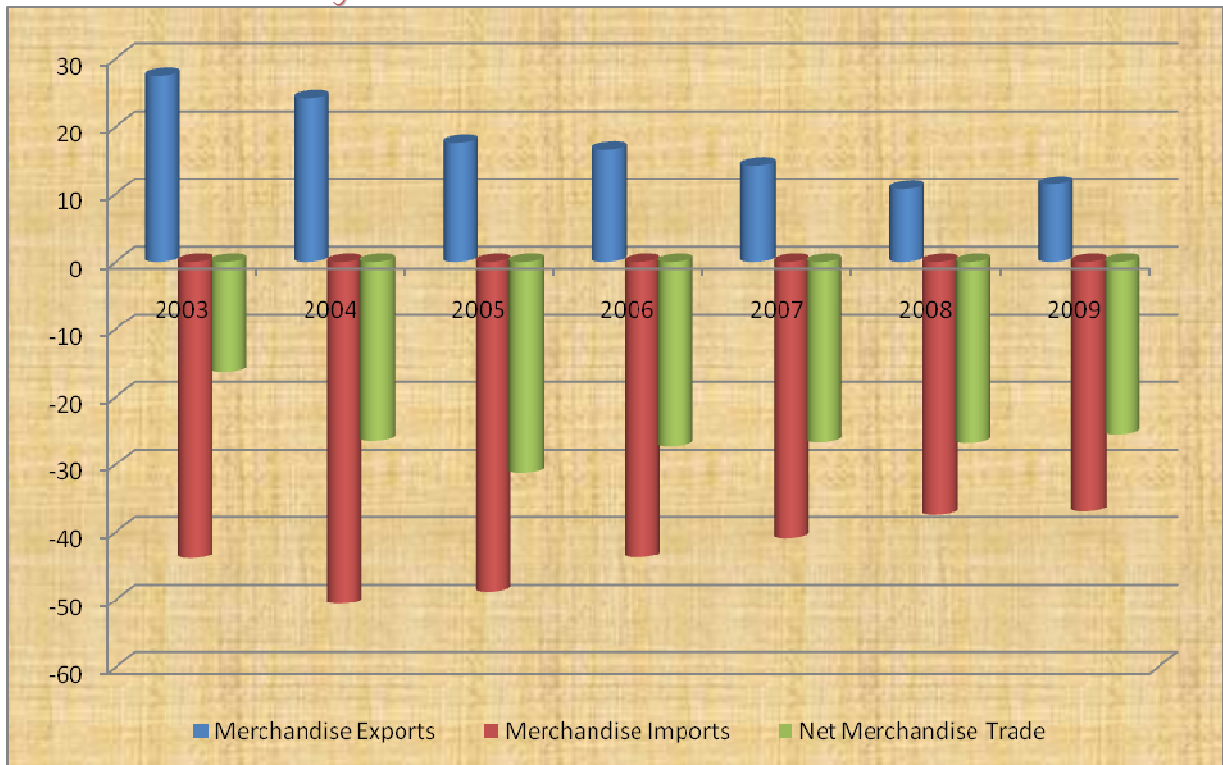
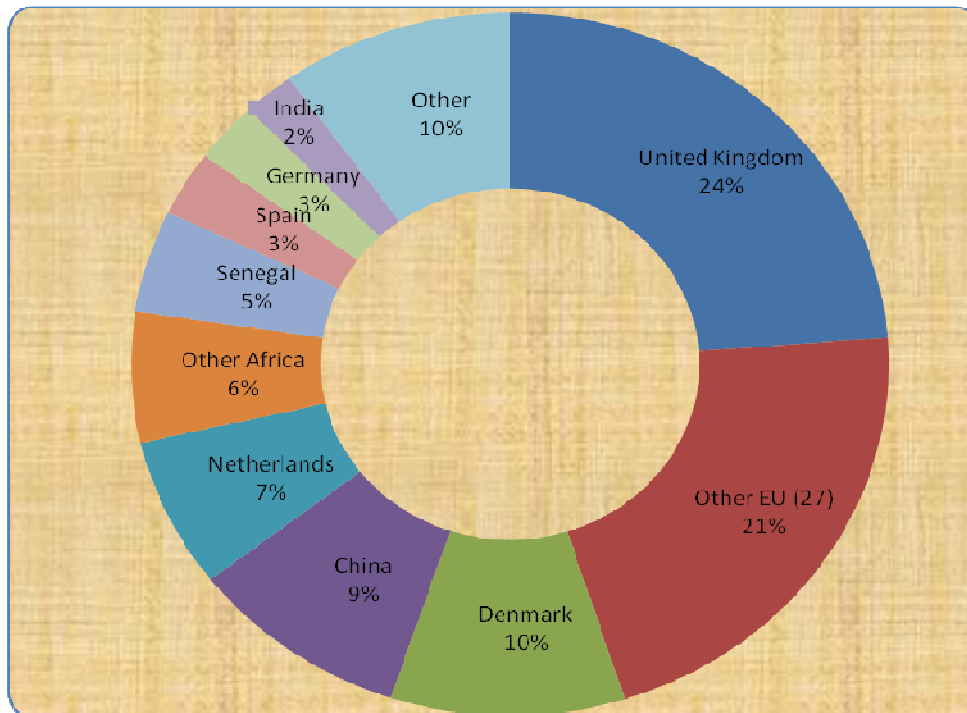


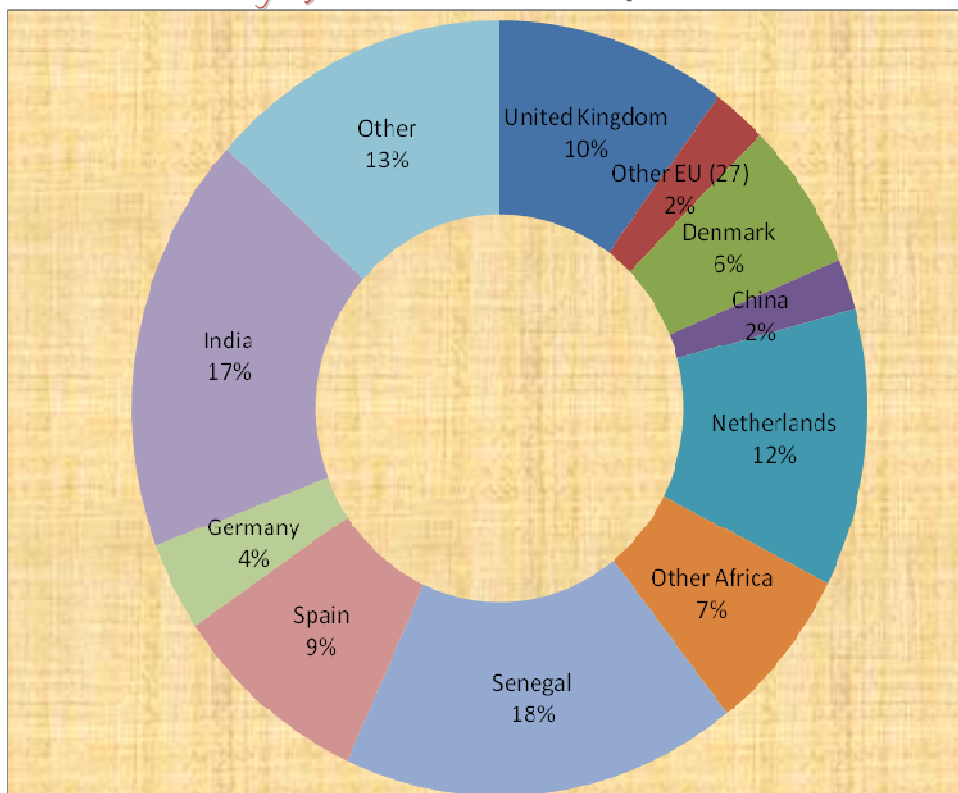
Figure 3 – Current Account Balance in Percentage of GDP



*Figure 4 - 2008 Direction of Merchandise Export Trade in Percent*



*Figure 5 - 2008 Direction of Merchandise Export Trade in*



## SECTION 4: WHERE WE WANT TO BE

### RATIONALE FOR THE NES PRIORITY SECTORS

The sectors, sub-sectors, and cross-cutting sub-sectors that were identified for inclusion in the National Export Strategy were selected using a set of agreed criteria; these included:

- (i) Contribution to National Gross Domestic Product
- (ii) Contribution to Foreign Exchange Earnings
- (iii) Contribution to employment
- (iv) Contribution to rural development
- (v) Potential for growth
- (vi) Strategic importance to the economy

The rationale for the above criteria emanated from the goals and objectives of the National Export Strategy discussed earlier under Section 1. As such, the criteria rationale was underpinned by answers to three questions:

- (i) Which of the sectors and sub-sectors can best make the desired contributions as per the indicated criterions above?
- (ii) Which of the sectors and sub-sectors have the potential to add the most to the economic growth of the country?
- (iii) Which of the sectors and sub-sectors are deemed to be the most strategic to the economy?

### VISION, OBJECTIVES, & STRATEGIES

#### GROUNDNUTS

**VISION:** To transform the Groundnut sub-sector into a commercialized value chain with focus on value addition and processing.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Increase local production
2. Develop R&D center to ensure high yielding and disease resistant varieties
3. Overcome challenges of Aflatoxin
4. Improve existing marketing arrangements and better storage facilities
5. Reestablishment of a private sector led Cooperative System

### STRATEGIC ISSUES:

The Groundnut sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Marketing challenges due to inadequate financing for marketing of the cash crop
2. Inadequate processing equipment and storage facilities.
3. High cost of transportation from farm gate to groundnut buying and processing centers
4. Aflatoxin, pests and disease challenges
5. Inadequate commercial farms and predominant use of subsistence type farming techniques and practices
6. Inadequate Research & Development with limited agricultural extension services
7. Limited and poorly organized producer organizations

### ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS

1. Attract investment into the sector through Public Private Partnership (PPP) initiatives
2. PPP initiatives and re-introduction of the Cooperative Marketing Scheme
3. Improve rural road access and develop river transport infrastructures
4. Provide adequate Agriculture Extension Services & WAQP & NARI to embed Quality Infrastructure in the Groundnut value chain to improve technical and scientific competence in management, handling, and quality assurance.
5. Attract investments in commercial groundnut farming
6. MoA to invest in R&D and Agricultural Extension Services
7. Re-introduce the Cooperative Scheme of the past

### OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES

1. Facilitate investments into commercial groundnut farming given availability of arable land and the River Gambia for Irrigation of commercial farms
2. Develop River Transport to leverage the abundant labour and address road access challenges
3. Increase groundnut production through PPP initiatives to leverage AGOA, EU, and GSP market access preferences

### STRATEGY FRAMEWORK

Table 13

OBJECTIVE	STRATEGY	IMPLEMENTING AGENCIES	COST IMPLICATION	US\$ COST ESTIMATE
Facilitate investments in commercial groundnut farming given availability of arable land and the River Gambia for Irrigation of	<ul style="list-style-type: none"><li>• To attract investment into the sector through Public Private Partnership initiatives</li></ul>	GIEPA & MoJ / MoFEA / MoLGL	Yes	27,273
	<ul style="list-style-type: none"><li>• To introduce private Cooperative Marketing Schemes</li><li>• To provide adequate</li></ul>	MoA / DoA / GIEPA	Yes	54,545

commercial farms	Agriculture Extension Services and embed Quality Infrastructure in the Groundnut value chain	MoA / WAQP / NARI	Yes	202,488
	<ul style="list-style-type: none"> <li>To invest in R&amp;D and Agricultural Extension</li> </ul>	MoA/DoA/NARI/ FAO /TGSB	Yes	363,636
Develop River Transport to leverage the abundant labour and address road access challenges	<ul style="list-style-type: none"> <li>To improve the conditions and number of river transport fleet</li> </ul>	GPA / Ferries / GIEPA	Yes	363,636
	<ul style="list-style-type: none"> <li>To invest in new jetty and landing sites for new barges</li> </ul>	GPA / Ferries / GIEPA	Yes	2,909,091
Increase groundnut production through PPP initiatives to leverage AGOA, EU, and GSP market access preferences	<ul style="list-style-type: none"> <li>To improve the capacity and skills of the Aflatoxin Lab under NARI; Pesticide Residue Lab under Plant Protection Services for determination of Minimum Residue Levels (MRLs)</li> </ul>	WAQP / NARI / FAO / UNCTAD / ITC / WTO / TGSB / PPS	Yes	109,091
	<ul style="list-style-type: none"> <li>To develop capacities of Agricultural extension personnel on quality assurance systems and good agricultural practices</li> </ul>	WAQP / NARI / FAO / UNCTAD / ITC / WTO / DoA / TGSB	Yes	109,091
	<ul style="list-style-type: none"> <li>To strengthen farmer associations and private individuals and plantations on good agricultural practices</li> </ul>	MOA / NARI	Yes	181,818

## CASHEW

**VISION:** To be the regional center of excellence in cashew value-addition leading the way in processing, processing, exports and Research & Development.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Gradually Increase local production of Raw Cashew Nuts (RCN)
2. Develop a Cashew R&D center to ensure high yielding disease resistant varieties and to maintain the local ‘Mother Tree’
3. Promote gradual qualitative growth in value-addition in cashew by increasing the capacity and efficiency of cashew processing plants
4. Reduce the dependence of the sector on RCN from neighboring countries
5. Promote technology transfer through adoption of appropriate cashew processing technology



### STRATEGIC ISSUES:

The Cashew sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Lack of R&D in cashew
2. Number of check points (34) which delays the Transit Trade and Exports of RCN
3. Lack of ISO Certification body to ensure compliance with international standards in food processing
4. High corporate tax (32%) and the high number of Local Government & Municipality taxes (14 in total)
5. High lending interest rates by banks to businesses (17 – 30% rates of interest)
6. Low skill levels in cashew processing and best cropping practices

### ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS

1. Establish an R&D center for cashew
2. Reduce check points to 20 and have 3 designated check points for exports Re-exports and transit trades
3. Leverage the ACA Quality Seal as a stepping stone to higher quality standards in cashew
4. Government to gradually reduce corporate tax rate to 20% and Local Government & Municipality taxes reduced to 7
5. Government to pass and enact legislation to create a stock market and the private sector to push for its realization to create an alternative avenue for raising capital
6. Government & Private sector to partner to build, develop, and improve the skills set of manufacturing. Tax credits can be extended by Government to manufacturing outfits that invest in training.

### OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES

1. Work with the existing Cashew Farmer Associations in an out-grower scheme to expand production of RCN using the high quality local cashew crop variety
2. Export to the International market given the close proximity of Europe and the US
3. Expand production of cashew to fill the global supply gap created by decreasing production in Brazil, Vietnam, and India

### STRATEGY FRAMEWORK

Table 14

OBJECTIVE	STRATEGY	IMPLEMENTING AGENCY	COST IMPLICATION	US\$ COST ESTIMATE
Work with the existing Cashew Farmer Associations in an out-grower scheme to expand	<ul style="list-style-type: none"><li>• To engage IRD, US Embassy, &amp; MOA</li><li>• To have consultative dialogue with the Cashew Farmer Associations on production expansion</li></ul>	GIEPA	No	0
		GIEPA/IRD/MOA/EIF	Yes	390,000

production of RCN using the high quality local cashew crop variety	<ul style="list-style-type: none"> <li>To engage ACI to explore establishing a Cashew R&amp;D Centre in The Gambia</li> <li>To undertake Study Tour to WATH offices in Ghana &amp; Senegal</li> </ul>	GIEPA/WATH/IRD/MOA/WAQP/NSCPSC	No	<b>0</b>
		GIEPA/WATH	Yes	<b>17,000</b>
Export to the International Market	<ul style="list-style-type: none"> <li>To support study on check points within the SeGaBi region</li> <li>To engage Businesses with potential to export on their Technical Assistance needs</li> <li>To draw up Action Plans for agreement with WATH</li> <li>To conduct study tours for businesses involved in AGOA priority products at Centers of Excellence in countries that have successfully leveraged AGOA</li> </ul>	GIEPA & WATH	No	<b>0</b>
		GIEPA/WATH/IRD	Yes	<b>360,000</b>
		GIEPA & Businesses	No	<b>0</b>
		MOA/GIEPA /Beneficiary Businesses/WATH	Yes	<b>46,000</b>
Expand production of cashew to take advantage of the global supply gap created by decreasing production in Brazil, Vietnam, and India	<ul style="list-style-type: none"> <li>To engage the Cashew Alliance of The Gambia, the IRD, and the APEX body of Cashew</li> <li>To engage MOA vis-à-vis Cashew's identification as a focus value chain in the Gambia Growth &amp; Competitiveness Project</li> <li>To establish organized marketing arrangements of cashew nuts with the goal of having farm gate prices irrespective of the dealer determined by market forces</li> <li>To introduce standardization in weights &amp; measures in the Cashew Value Chain</li> <li>To provide high quality cashew crop variety to farmers to expand production – on commercial basis</li> </ul>	GIEPA /CAG/IRD	No	<b>0</b>
		GIEPA/MOA/EIF	No	<b>0</b>
		CAG/Cashew Farmer Associations	Yes	<b>344,000</b>
		WAQP/NSCPSC/TGSB/CAG, Weights & Measures Bureau	Yes	<b>11,000</b>
		IRD/CAG	Yes	<b>148,000</b>



## **FISHERIES**

**VISION:** Achieve a well balanced ecomarine system that supports responsible and sustainable exploitation and utilization of fisheries resources.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Ascertain fishery stock through acoustic trawl surveys
2. Improve infrastructure of major fish landing sites and their hygienic conditions
3. Improve the value chain
4. Institute standards and laboratory facilities for the conduct of biological and chemical tests
5. Attract notable investments in the value chain to leverage its export potential
6. Enforcement of Fisheries Regulation to ensure rational management of fisheries resources

*STRATEGIC ISSUES:*

The Fisheries sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Inadequate infrastructure for improved fish handling and processing – Cold storage facilities, Landing sites, Smoke houses , and Drying platforms
2. Inadequate technical and scientific expertise to ensure conformity with Industry Standards
3. Inability to adequately implement Sanitary and Phytosanitary (SPS) measures to ensure sustained market access.
4. Weak Management and its attendant challenges of access and cost of credit; poor development of fisheries associations and Community Based Organizations (CBOs).
5. Inability to effectively implement the Fisheries Legislation
6. Fragmented value chain

*ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Promote investment in the Fisheries Value Chain through Public Private Partnership initiatives
2. Develop technical and scientific expertise in Fisheries Management , Standards, and SPS measures and adopt best practices in these areas
3. Improve capacity of Fisheries Department, Fisheries Processor personnel, and industry operatives on SPS measures
4. Strengthen managerial skills of CBOs & Fishing Associations, develop their capacities and capabilities and embed best practices of pilot Community Fishing Centres

5. Improve capability and capacity of the Fisheries Department to effectively enforce the fisheries legislation & ensure Advocacy for such
6. Promote integration of the Fisheries Value Chain through targeted Public Private Partnership investment initiatives to address the challenges of the Value Chain

*OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES*

1. Reinvigorate the activities of the AGOA Resource Center (ARC) to benefit businesses engaged in fisheries export activities. This would be achieved by partnering the West African Trade Hub (WATH) and facilitated through the US Embassy in The Gambia and the Ministry of Trade, Industries & Regional Integration.
2. To propose a Cabinet Paper to the National Assembly for a financing scheme to integrate and develop the Fisheries Value Chain.
3. To promote investment in the Fisheries Value Chain and improve fisheries management
4. To develop Standards Laboratory for the Fishing Industry and improve the institutional capacity and technical competence of industry personnel to ensure compliance with Standards and sanitation in Fishery activities.
5. To promote and facilitate investment in the Fisheries Value Chain and spearhead Bilateral Cooperation with Fisheries Best Practice Centres
6. To engage the Bilateral Partners that had supported the Government's CFC initiatives in efforts to replicate the successes of the scheme

**STRATEGY FRAMEWORK**

*Table 15*

OBJECTIVE	STRATEGY	IMPLEMENTING AGENCIES	COST IMPLICATION	US\$ COST ESTIMATE
Promote Businesses engaged in Fisheries export activities	<ul style="list-style-type: none"> <li>• To engage WATH, US Embassy, &amp; MOTIE</li> </ul>	GIEPA	No	<b>0</b>
	<ul style="list-style-type: none"> <li>• To undertake Study Tour to WATH offices in Ghana &amp; Senegal</li> </ul>	GIEPA	Yes	<b>36,000</b>
	<ul style="list-style-type: none"> <li>• To document Export Procedures into an Export Guide Brochure</li> </ul>	GIEPA / GRA / WATH	Yes	<b>39,000</b>
Set up a financing scheme to integrate and develop the Fisheries Value Chain	<ul style="list-style-type: none"> <li>• To seek Cabinet approval on the objective by preparation of a Cabinet Paper</li> </ul>	DoF / MoFWR & NAM	No	<b>0</b>
	<ul style="list-style-type: none"> <li>• To hold an advocacy dialogue on the scheme through stakeholder consultation forum</li> </ul>	DoF / GIEPA / MoFWR & NAM & other relevant institutions	Yes	<b>11,000</b>
	<ul style="list-style-type: none"> <li>• To implement the scheme</li> </ul>	DoF / GIEPA / MoFWR & NAM / MoJ / other relevant institutions	Yes	<b>4,002,000</b>

Promote investment in the Fisheries Value Chain and improve Fisheries management	<ul style="list-style-type: none"> <li>• To hold PPP consultative workshops on Fisheries</li> </ul>	GIEPA/MOTIE /Commonwealth/other partners	Yes	<b>23,000</b>
	<ul style="list-style-type: none"> <li>• To develop concept proposals for investment in Fisheries Value Chain under PPP initiative</li> </ul>	GIEPA / DoF / MOTIE	Yes	<b>15,000</b>
	<ul style="list-style-type: none"> <li>• To promote best practices in Fisheries Management</li> </ul>	GIEPA / WAQP / Standards Bureau / DoF / EU	Yes	<b>50,000</b>

Ensure SPS compliance in the Fisheries sector	<ul style="list-style-type: none"> <li>To facilitate TA on Standards through multilateral and Bilateral cooperation</li> <li>To identify gaps in Standards with TA from multilateral organizations</li> <li>To implement the recommendations of the Fisheries Value Chain Study financed by GAMJOBS</li> <li>To identify Standards to establish, sustain and enhance market access</li> <li>To enter into partnership initiatives with WA-EU EPA experts and AGOA/NEPAD experts for assistance to ensure alignment of standards</li> <li>To establish/build capacity of regional fisheries offices/directorates to respond better to local needs of fisheries communities and for general management of fisheries resources</li> <li>To train fisheries operators &amp; staff in fisheries hygiene &amp; record keeping</li> <li>To establish links between the Fisheries Lab and international Fisheries research institutions</li> <li>To establish scientific advisory committee to identify research partners; define research &amp; implement extension programmes to transfer research findings to fisherfolk &amp; other stakeholders.</li> </ul>	MoTIE/MoFAIC&GA / WAQP/ DoF CA	No	<b>365,000</b>
		WAQP/NCSPSC/OVP / TGSB	No	<b>0</b>
		DoF / MoFWR&NAM	Yes	<b>4,309,000</b>
		WAQP/NCSPSC/OVP / DoF	No	<b>0</b>
		WAQP/NCSPSC	Yes	<b>50,000</b>
		MoFWR&NAM/DoF/ CFC	Yes	<b>285,000</b>
		DoF / GBoS / Possible International Donors	Yes	<b>52,000</b>
		MoFWR & NAM / DoF / NCC / UTG / WAQP / OVP / Standards Bureau	Yes	<b>100,000</b>
MFWR&NAM/FD/MoFEA/UTG/FAO	Yes	<b>145,000</b>		

Promote Bilateral cooperation with fisheries best practice centers	<ul style="list-style-type: none"> <li>To develop concept notes and investment proposals on Fisheries Value Chain for targeted investors</li> </ul>	GIEPA / DoF / WAQP / GAMJOBS	Yes	<b>31,000</b>
	<ul style="list-style-type: none"> <li>To pursue promotion and facilitation of establishment of bilateral relationships with Fisheries Best practice countries (including Study Tours)</li> </ul>	MoFWR& NAM/GIEPA / MoTIE / MOFAIC & GA / DoF / WAQP / Standards Bureau	Yes	<b>100,500</b>
	<ul style="list-style-type: none"> <li>To conduct trawl and hydro-acoustic fish stock assessment</li> </ul>	MoFWR&NAM / DoF / FAO / NORAD	Yes	<b>114,000</b>
Replicate the success of the CFC Management scheme	<ul style="list-style-type: none"> <li>To re-engage past donors and sponsors for the establishment of the TANJI &amp; GUNJUR CFC</li> </ul>	DoF / MoFWR & NAM / MoFAIC & GA	Yes	<b>100,000</b>
	<ul style="list-style-type: none"> <li>To advocate for /Sensitization on CFC</li> </ul>	DoF / GIEPA	Yes	<b>18,500</b>
	<ul style="list-style-type: none"> <li>To put in place training Programmes to embed Best Practices within CFC</li> </ul>	DoF / MoFWR & NAM / WAQP / EIF	Yes	<b>21,000</b>

## HORTICULTURE

**VISION:** Develop horticulture into a vibrant, enterprise driven, export oriented sector to generate income for farmers, reduce poverty, and stimulate socio economic development.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Improve market access for farmers and women farmer associations produce
2. Create market linkages between the horticultural sector and the Tourism industry
3. Attract investments in cold storage and refrigerated transportation trucks and reefers
4. Improve air and sea freight logistics through investments and engagement of air and freight forwarding agents/businesses
5. Promotion of private sector led cooperative schemes to assist with requisite horticultural inputs, farming equipment, and watering infrastructure support.

### *STRATEGIC ISSUES:*

The Horticulture sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Inadequate skilled, knowledgeable Extension Services workers
2. Inadequate and limited Market Access
3. Inadequate research undertakings
4. Lack of specialized processing and inadequate storage facilities
5. Poor Quality Infrastructure particularly Weights & Measures and Calibration
6. High inputs and logistics costs – fertilizer, electricity, transportation

### *ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Train more Research & Extension Services personnel to meet the minimum regional target of 36
2. Create inter-linkages between Hotel Industry and Horticulture
3. Resuscitate the activities of NARI with additional funding support
4. Attract Investments in storage Depots and encourage value addition through Agro-processing
5. Promote use of weights and calibration & enforce use of International weights Standards (SI), especially at the retail level
6. Promote Private Sector led Cooperative Schemes to support farmers with agricultural input needs

### *OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES*

1. Leverage the available land and the River Gambia for expansion by attracting investments in Agro Processing business ventures
2. Improve Market Access through provision of assistance to horticultural businesses to become certified in globally recognized horticultural certifications that would enable them to gain market access to the EU to leverage our close proximity
3. Leverage the River Gambia and fresh water bodies for irrigation of horticultural projects intended for diversification
4. Leverage the readily available labour force into horticultural production by providing attractive incentive schemes

**STRATEGY FRAMEWORK**

*Table 16*

<b>OBJECTIVE</b>	<b>STRATEGY</b>	<b>Implementing Agency</b>	<b>Cost Implication</b>	<b>US\$ Cost Estimate</b>
Leverage the available land and the River Gambia for expansion	<ul style="list-style-type: none"> <li>To organize outward targeted investment missions to attract investment in Agro Processing</li> <li>To promote local Agro Processing ventures initially through development of entrepreneurship at incubation centers</li> <li>To implement irrigation farming techniques and methods</li> <li>To request for Technical Assistance in irrigation, Agro Processing and source funding for these</li> </ul>	GIEPA / DOA	Yes	<b>34,545</b>
		GIEPA / GCCI / SDF / EIF	Yes	<b>15,745,455</b>
		DOA / MoFWR & NAM	Yes	<b>11,129,091</b>
		MOA/DOA/MOTIE / EIF	Yes	<b>90,909</b>
Improve Market Access	<ul style="list-style-type: none"> <li>To request for Technical Assistance from International Standards bodies to get horticultural businesses to become certified in global horticultural certifications</li> <li>To undertake measures to assist horticultural businesses to understand and meet Market Access guidelines of Standards, Product Quality, and Packaging &amp; Labeling</li> <li>To invest in cold storage</li> </ul>	WAQP/NARI/ISO/ Standards Bureau	Yes	<b>90,909</b>
		DOA/FTS/ECOWAS TEN/NARI	Yes	<b>17,207,273</b>
		GIEPA	Yes	<b>10,909,091</b>
Leverage the River Gambia and fresh water bodies for irrigation of horticultural projects intended for diversification	<ul style="list-style-type: none"> <li>To carry out studies to ascertain &amp; ensure environment impact on use of fresh water bodies and salt intrusion along the River Gambia</li> </ul>	NEA/DOA/FAO	Yes	<b>7,273</b>

Leverage the readily available labour force into horticultural production by providing attractive incentive schemes	<ul style="list-style-type: none"> <li>To promote and encourage cottage industries in Agro Processing of horticultural produce</li> </ul>	DOA / MOTC / GIEPA / EIF	Yes	<b>18,018</b>
	<ul style="list-style-type: none"> <li>To provide logistical support and schemes to help horticultural businesses access the needed inputs necessary for expansion of production</li> </ul>	DOA / FAO / GIEPA	Yes	<b>554,545</b>
	<ul style="list-style-type: none"> <li>To provide training and capacity building in the areas of farming techniques, agronomy, and carrying out of extension services</li> </ul>	DOA / NARI / FA	Yes	<b>201,455</b>

## TOURISM

**VISION:** To create a strong sustainable world class standard Tourism Industry generating 25% of GDP.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Facilitate targeted investments in Conference, Rural, Eco, and Cultural Tourism
2. Facilitate investments in water-based leisure tourism along the banks of River Gambia
3. Strengthen Tourism Marketing activities in Scandinavia and Germany and Nigeria
4. Facilitate investments in cottage-based industries – notably Agro Processing & Poultry – to serve the fruit, vegetable, non-alcoholic beverages, and Poultry needs of the Hotel Industry.
5. Establish official purchasing channels between local horticulture cooperatives and hotels and restaurants.

**STRATEGIC ISSUES:**

The Tourism sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Existence of illegal accommodation operators – motels and guest houses – in the informal hotel sector denying Government of tourism income
2. Limited diversification of tourism products
3. Limited inter-linkages between the tourism industry and the economy
4. High cost of electricity
5. Dependence of the industry on limited scheduled and charter flights
6. High refueling costs (aviation fuel)



**ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS**

1. GTB to improve on monitoring of Tourism Operatives and encourage illegal operators to register their businesses and enforce policy for non-compliance
2. GTB and MOTC to undertake initiatives to encourage Tourism Operators to improve and diversify tourism products
3. MOTC & MOA with support from GIEPA to encourage and promote inter-linkages between the Tourism and Agriculture
4. Promote Investment in alternative sources of energy to improve cost – Solar and Wind technologies
5. GIA / GCAA / GTB to engage regional and international carriers for air access. GIEPA with support of relevant stakeholders to facilitate investment for establishment of a carrier headquartered in The Gambia
6. Encourage businesses to invest in duty free shops at the airport

**OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES**

1. Facilitate investments in the sector targeted at Conference, Rural, Eco, and Cultural Tourism
2. Encourage and facilitate investments in water-based leisure tourism to leverage the River Gambia for Eco-Tourism facilities along its Banks
3. Strengthen Tourism Marketing activities in Scandinavia and Germany to regain lost markets and Nigeria as emerging and strong new markets
4. Facilitate investments in Cottage-based industries in Agriculture – notably Agro Processing & Poultry – to serve the fruit, vegetable, non-alcoholic beverages, and Poultry needs of the Hotel Industry.
5. Establish official purchasing channels between local horticulture cooperatives and hotels and restaurants.

**STRATEGY FRAMEWORK**

*Table 17*

OBJECTIVE	STRATEGY	Implementing Agency	Cost Implication	US\$ Cost Estimate
Facilitate investments in the sector targeted at Conference, Rural, Eco, and Cultural Tourism	<ul style="list-style-type: none"> <li>• To undertake initiatives to encourage Tourism Operators to improve and diversify tourism products</li> </ul>	GTB / MOTC / GHA/TTAG/ASSET	No	<b>0</b>
	<ul style="list-style-type: none"> <li>• To attract new investments in unconventional Tourism through PPP initiative</li> </ul>	GIEPA / MOTC / GTB	Yes	<b>73,000</b>
	<ul style="list-style-type: none"> <li>• To implement standards and ensure compliance with star classification of hotels</li> </ul>	MOTC / TGSB/ GCC / UNWTO	Yes	<b>210,000</b>

Encourage and facilitate investments in water-based leisure tourism to leverage the River Gambia for Eco-Tourism facilities along its Banks	<ul style="list-style-type: none"> <li>To engage in an extensive Rural Area study Tour to identify pristine areas for water-based Leisure and Eco Tourism</li> <li>To undertake Study Tour in 'best practice' Eco and Water-based Tourism nations to learn about the challenges and best practices</li> <li>To develop investment proposals and brochures for marketing and promotional investment campaigns</li> </ul>	GTB / MOTC / GIEPA / MoLGL	Yes	<b>47,660,000</b>
		GTB/ MOTC / GIEPA / MoLGL	Yes	<b>92,000</b>
		GIEPA / GTB / MOTC /GHA / TMC	Yes	<b>199,000</b>
Strengthen Tourism Marketing activities in lost markets (Scandinavia and Germany) and in existing markets and Nigeria as an emerging and a strong new market	<ul style="list-style-type: none"> <li>To engage in a targeted international marketing campaigns to promote the cultural heritage of the country</li> <li>To develop e-marketing scheme to incorporate visiting Tourists info to create marketing database accessible to the hotels</li> <li>To encourage Hotel Operators to market and advertise their hotels with international Marketing Travel Agencies and Tour Operators</li> </ul>	GTB / MOTC / TMC / GHA/ASSET/TTAG / NCAC	Yes	<b>370,000</b>
		MOFEA / MOI / MOTC/ GCAA / GTB	Yes	<b>157,000</b>
		TMC / GHA /ASSET /GTB / MOTC	Yes	<b>90,000</b>
Facilitate investments in Cottage-based industries in Agriculture and other sectors – notably Agro Processing & Poultry – to serve the fruit, vegetable, beverage, and poultry needs of the Hotel Industry.	<ul style="list-style-type: none"> <li>To undertake a consultative dialogue among all relevant stakeholders to spearhead the strategic objective</li> <li>To identify existing cottage industries to be supported as pilot projects for the strategic objectives with support of Tourism Industry</li> <li>To facilitate investments into cottage-based industries through PPP initiatives</li> <li>To establish sustainable Agricultural Extension Services to support pilot farms that would feed cottage industries</li> <li>To establish Food Safety Standards Laboratories to ascertain hygiene and quality of food products of the cottage industries</li> </ul>	MoTC / MoA / DoA / GTB / TMC / GHA /ASSET / GIEPA / MoTIE (EIF)	No	<b>0</b>
		MoA / DoA / GTB / MoTC / GIEPA	Yes	<b>50,000</b>
		GIEPA / GTB	No	<b>0</b>
		MOA / NARI	No	<b>0</b>
		OVP/ WAQP / NCSPSC / TGSB / NARI / PhLabs	Yes	<b>0</b>

Establish formal purchasing channels between local horticulture cooperatives, cottage industries, and hotels	<ul style="list-style-type: none"> <li>To develop contractual binding scheme that is agreeable to all parties concerned with provisions for escape clauses</li> </ul>	GTB / MoTC / Hotels / Pilot Horticulture Farms , Cottage Industry / GIG / Concern Universal / TANGO	Yes	<b>1,075,000</b>
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## MANUFACTURING

**VISION:** To re-orient manufacturing into a sector of excellence producing affordable and quality products for exports and contributing to employment generation, economic growth, and wealth creation.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Increase and diversify industrial output
2. Increase the number of manufacturing businesses
3. Create employment opportunities
4. Promote technology transfer through adoption of new manufacturing technologies
5. Reduce overdependence on import trade

*STRATEGIC ISSUES:*

The Manufacturing sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Cumbersome cargo clearance procedures
2. Numerous check points which impedes the Transit and Re-export trade
3. Lack of conformity assessment services to ensure compliance of manufacturers with international standards
4. High corporate tax (32%) and the high number of Local Government & Municipality taxes
5. High lending interest rates by banks to businesses (17 – 30% rates of interest)
6. Inadequate skilled labour

*ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Streamline Customs cargo clearance procedures through creation of a one-stop shop and integration of trade facilitation units
2. Reduce check points to 20 and have 3 designated check points for exports, Re-exports and transit trades
3. Gambia Standards Bureau and to support conformity assessment and accreditation services
4. Government to gradually reduce the corporate tax rate to 20% and to reduce, harmonize, and simplify Local Government & Municipality taxes reduced to 7%

5. Government to enact legislation to create a stock market and the private sector to push for its realization to create an alternative avenue for raising capital
6. Government & Private sector to partner to build, develop, and improve the skills set of manufacturing. Tax credits to be extended by Government to manufacturing outfits that invest in training.

**OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES**

1. Reinvigorate the activities of the AGOA Resource Center (ARC) to benefit businesses engaged in export activities. This would be achieved by partnering the West African Trade Hub (WATH) and facilitated through the US Embassy in The Gambia and the Ministry of Trade, Industries & Regional Integration.
2. GIEPA and MoTIE in a consultative process to develop a Cabinet Paper on a financing scheme for export development
3. GIEPA through the Ministry of Trade, Industries & Regional Integration to propose a Cabinet Paper to Parliament for financing scheme for export development.
4. Government to enact legislation and regulations for the Public Private Partnership, which would be used to promote investments in manufacturing activity.
5. The Gambia Standards Bureau and WAQP to support and address the requirements of the sector in the areas of standards and conformity assessment services.
6. To provide adequate information and support for manufacturers to benefit from the ETLS

**STRATEGY FRAMEWORK**

*Table 18*

OBJECTIVE	STRATEGY	Implementing Agency	Cost Implication	Cost Estimate
Reinvigorate the activities of the AGOA Resource Center (ARC) to benefit businesses engaged in export activities.	<ul style="list-style-type: none"> <li>• To undertake Study Tour to WATH offices in Ghana &amp; Senegal to learn from best practices and create business to business links</li> </ul>	GIEPA	Yes	<b>16,300</b>
Increase the number of businesses dealing in AGOA specific products to reach Export Ready Status	<ul style="list-style-type: none"> <li>• To engage Businesses with potential to export on their Technical Assistance needs</li> <li>• To draw up Action Plans for agreement with WATH</li> <li>• Sign an MOU with WATH and draw up action plans to help potential exporting businesses dealing in AGOA specific products to achieve Export Ready Status</li> </ul>	GIEPA  GIEPA & Businesses  GIEPA/Beneficiary Businesses/WATH	Yes  No  No	<b>31,000</b>
Create an Export Development Fund (NES Fund).	<ul style="list-style-type: none"> <li>• To prepare Cabinet Paper</li> <li>• To hold an advocacy dialogue on the scheme through stakeholder consultation forum</li> </ul>	GIEPA/MoTIE  GIEPA/MoTIE/other relevant institutions	No  No	

	<ul style="list-style-type: none"> <li>To implement the scheme</li> </ul>	GIEPA/MoTIE/other relevant institutions	No	
Promote investments in manufacturing activity	<ul style="list-style-type: none"> <li>To sensitize businesses on PPP through consultative workshops</li> <li>To attract investment in Manufacturing through PPP with focus on Skills development - primarily engineering (Mechanical, electrical, Electromagnetic) To prepare Cabinet Paper on PPP</li> </ul>	GIEPA/MOTIE /Commonwealth/others  GIEPA/AGM	No  Yes	<b>170,000</b>
Enhance manufacturing standards to leverage the market of the WA-EU ACP Pact	<ul style="list-style-type: none"> <li>To seek TA on Standards from multilateral/Bilateral cooperation through MOFAIC&amp;GA</li> <li>To identify Gaps in standards and conformity assessment services with TA from multilateral institutions</li> <li>To enter into partnership initiatives with WA-EU Pact experts and AGOA/NEPAD experts for assistance to ensure implementation of international standards</li> </ul>	MoTIE/MoFA/TGSB  WAQP/NSCPSC/OVP  WAQP/NSCPSC	No  Yes  Yes	<b>191,000</b>  <b>150,000</b>

## RE-EXPORTS

**VISION:** To enhance the competitiveness of re-export trade with the objective of contributing significantly to the foreign exchange earnings, employment creation, and economic growth and to serve as a distribution centre of excellence.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Diversify re-exports to include bulk breaking, warehousing, and packaging value addition services
2. Create a trade observatory and database to capture trade statistics
3. Reduce customs & police check points
4. Include a Bilateral Trade Treaty under the Senegalo-Gambia Secretariat to cover Transit & Cross Border Trade Issues
5. Encourage businesses to utilize the ISRT Scheme
6. Encourage use of Re-export warehousing facilities as provided for by the Customs & Excise Act, 2010.

*STRATEGIC ISSUES:*

The Re-export sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Inadequate record keeping and data on the re-export trade making planning and strategy development on the sub-sector a challenge
2. Exclusive focus on merchandise trade with little or no value added opportunities
3. Lack of adequate port equipment, port finance, and cargo space constraints
4. Inadequate modern port technologies and systems
5. Numerous check points along the Banjul-Basse-Badiara Transit Road which impedes the Transit and Re-export trades

*ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Create a trade observatory and database to capture trade statistics
2. Diversify the re-export trade to include value added services of bulk breaking, warehousing, sorting, packaging and labeling
3. Implement the strategies and plans of the Port Master Plan Document (2008)
4. Reduce check points and introduce 3 strategic check points to facilitate transportation for the Re-export and Transit trades

*OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES*

1. Create a trade observatory and database to capture trade statistics
2. Diversify the re-export trade to include value addition services of bulk breaking, warehousing, sorting, packaging and labeling and remove duties imposed on Re-exports
3. Implement the strategies and plans of the revised (2008) Port Master Plan Document

4. Reduce check points and introduce 3 strategic check points to facilitate transportation for the Re-export and Transit trades
5. Upgrade the Senegalo-Gambia Secretariat into a bilateral treaty with re-export trade agreements as one of the key protocols

### STRATEGY FRAMEWORK

Table 19

OBJECTIVE	STRATEGY	Implementing Agency	Cost Implication	US\$ Cost Estimate
Create a trade observatory and database to capture trade statistics	<ul style="list-style-type: none"> <li>• To develop a Trade Database to capture Trade statistics to help with strategy development &amp; trade intelligence capable of interfacing between the Trade Database &amp; GBOS Statistics platform</li> </ul>	MoFEA/MOTIE /MoICI/GRA /GIEPA/GBoS/WATH	Yes	<b>800,000</b>
	<ul style="list-style-type: none"> <li>• To develop capacity in Trade Data capture and database management &amp; administration</li> </ul>	MoTIE/GRA /WATH/GIEPA	Yes	<b>90,000</b>
Diversify the re-export trade to include value addition services of bulk breaking, warehousing, sorting, packaging, and labeling	<ul style="list-style-type: none"> <li>• To develop Investment Proposals to attract investments in the Transit and Re-export trade</li> </ul>	GIEPA/GPA	No	<b>55,000</b>
	<ul style="list-style-type: none"> <li>• To promote investments in the Re-export and Transit trade through PPP initiatives</li> </ul>	MoTIE/GIEPA /GPA/	Yes	<b>85,000</b>
	<ul style="list-style-type: none"> <li>• To increase the Grace Period on cargo clearance of transit goods from 15 days to its previous 30 days</li> </ul>	GRA/GPA/MoFEA	Yes	<b>153,000</b>
	<ul style="list-style-type: none"> <li>• To engage our trading partners to promote bilateral trade – Transit &amp; Re-export Trade</li> </ul>	MoA/OP/MoFA, MoFEA	No	<b>0</b>
Implement the strategies and plans of the Port Master Plan Document (revised 2008)	<ul style="list-style-type: none"> <li>• To develop investment proposals to attract investments for the identified Port projects</li> </ul>	MoFEA / GIEPA /GPA/GRA	No	<b>121,800,000</b>
	<ul style="list-style-type: none"> <li>• To conduct overseas Study Tour Mission to attract investment and Technical Assistance with the Ports Projects</li> </ul>	MoFEA/GPA/GRA/ GIEPA/MoTIE/other relevant institutions	Yes	<b>70,000</b>
Reduce check points and introduce	<ul style="list-style-type: none"> <li>• To develop &amp; implement Trade</li> </ul>	GCCI/ MoI /GIEPA	Yes	<b>28,000</b>

3 strategic check points to facilitate transportation for the Re-export and Transit trades	Facilitation Scheme for escorted passes for transit and re-export trade cargoes	/GRA		
	<ul style="list-style-type: none"> <li>To reduce check points for transit &amp; re-export trade cargo to 3 strategic countrywide check points (1 in Greater Banjul Area, 1 at Brikama and 1 before crossing to Senegalese Border)</li> <li>To develop/adopt and make mandatory use of Global Positioning System (GPS) for tracking of Trucks involved in the Transit &amp; Re-export Trades</li> </ul>	MOTIE/MOI/ /GRA/GIEPA/	Yes	<b>12,000</b>
Upgrade the Senegalo-Gambia Secretariat into a bilateral treaty with re-export trade agreements as one of the key protocols	<ul style="list-style-type: none"> <li>To undertake a joint Ministerial on the Strategic Objective</li> <li>To undertake full implementation of the ISRT protocols</li> <li>To strengthen the bilateral cooperation agreements between the Customs &amp; Border Posts of the two countries</li> </ul>	MoTIE/MoI /GRA/GIEPA	Yes	<b>50,000</b>
		OVP/MoFAIC&CA /GRA/MoTIE /GIEPA/GCCI	Yes	<b>102,000</b>
		MoTIE/GCCI	Yes	<b>1,510,000</b>
		OVP/MoFAIC&CA /GRA/MoI	Yes	<b>200,000</b>

## TRANSPORTATION & TRADE FACILITATION

**VISION:** To transform the Port of Banjul and Banjul International Airport into efficient and competitive entrepôts (gateway) serving the trade and distribution needs of the sub-region through streamlined Customs procedures and trade facilitation mechanisms.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Modernize, upgrade, and expand the Banjul seaport and airport facilities
2. Upgrade Port infrastructure and improve Port security to international standards to become an international trade and distribution destination
3. Improve road & water transport networks to enhance sub-regional re-exports
4. Enhance the existing trade facilitation committee with membership from relevant stakeholders
5. Create a one-stop shop for export facilitation
6. Create a functional trade information system to capture both trade data and trade facilitation information



### *STRATEGIC ISSUES:*

The Transportation & Trade Facilitation sub-sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Numerous check points which impede the Transit Trade, that is, both Exports and Re-exports
2. Inadequate Infrastructure (Standards)
3. Old Transportation fleet that do not meet ISRT Protocol requirement of using containerized trucks for interstate trade
4. Lack of Export Processing Zone facilities such as bonded warehousing, bulk breaking, and sorting facilities to meet trade facilitation needs
5. Time restrictions on transit trade truck movements – no movement allowed beyond 7 pm.
6. Border practices inconsistent with the provisions of ECOWAS Protocol on Free Movement of Goods and Persons

### *ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Streamline Customs cargo clearance procedures through creation of a one-stop shop and integration of trade facilitation units
2. Reduce check points and have 3 designated check points for exports, Re-exports and transit trades
3. The Gambia Standards Bureau (TGSB) to implement the National Quality Policy
4. Develop strategy to attract investments to meet ISRT standards
5. In consultation with the Ports and customs develop strategy to attract investment in haulage, expansion of the Ports, and Export Processing Zone facilities – bonded warehousing, bulk breaking, and sorting facilities to meet trade facilitation needs
6. Government to review law, with consideration for flexibility, that provides for restrictions on movement of trucks involved in the Transit & Re-export trade
7. Government to undertake to ensure that border practices are consistent with the provisions of the ECOWAS Protocol

### *OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES*

1. Leverage the liberalized economic environment to attract investments that would support and fast track the expansion projects and plans of the Ports and also attract investments in bulk breaking.
2. Government, through its bilateral relations with the BENELUX economies, to facilitate Port dredging project to enable larger TEU vessels to dock at the Port
3. Further enhance the efficiency of the Ports by leveraging ICT to enhance the competitiveness of the country through greater integrated connectivity of trade facilitating bodies, which would be enabled by the ACE Project
4. Government to enact legislation and regulations for the Public Private Partnership, which would be used to promote investments in Transportation & Trade Facilitation type businesses.
5. Implement the Quality Policy pillars of standardization, conformity assessment, accreditation and metrology

**STRATEGY FRAMEWORK**

*Table 20*

<b>OBJECTIVE</b>	<b>STRATEGY</b>	<b>Implementing Agency</b>	<b>Cost Implication</b>	<b>US\$ Cost Estimate</b>
Leverage the liberalized economic environment to attract investments that would support and fast track the expansion projects and plans of the Ports and also attract investments in bulk breaking.	<ul style="list-style-type: none"> <li>To pursue Investment Leads - specifically for Ports, Warehousing &amp; Business Park development</li> <li>To pursue implementation of Single Business Window</li> <li>To provide for Ports consideration in Investment Outreach Missions</li> <li>To develop July 22<sup>nd</sup> Business Park to provide for Warehousing Facilities for Break-bulk, sorting &amp; packaging for re-exports</li> </ul>	GIEPA/MOTIE/MOFA	Yes	<b>75,000</b>
		GIEPA/GCP	No	<b>0</b>
		GIEPA	Yes	<b>173,250</b>
		GIEPA/WATH	Yes	<b>100,000</b>
Government, through its bilateral relations with the BENELUX economies, to facilitate Port dredging project to enable larger TEU vessels to dock at the Port	<ul style="list-style-type: none"> <li>To engage the BENELUX economies</li> <li>To hold dialogue with Stakeholder on leveraging the opportunities provided by the ISRT</li> <li>To build capacity in the area of dredging and berthing</li> <li>To ensure compliance with ECOWAS Protocol on Free movement of Persons and ETLs in efforts to facilitate sub-regional trade.</li> <li>To promote joint border controls with Senegal in efforts to ensure better security and ease in the movement of persons &amp; goods within the borders.</li> <li>To attract Investments in Trucking and containerized Trucks</li> </ul>	MoWCI /MOFEA	Yes	<b>51,000</b>
		GIEPA/GGCI/NRA /NTA/ MoWCI /Ports /Transport Associations	No	<b>0</b>
		MOFEA/GPA	Yes	<b>20,000</b>
		MoFA/MoI/MOTIE/ GCCI	Yes	<b>73,000</b>
		MoFA/MoI/GRA	Yes	<b>100,000</b>
		GIEPA	Yes	<b>10,000</b>

Enhance the efficiency of the Ports by leveraging ICT to enhance the competitiveness of the country through greater integrated connectivity of trade facilitating bodies, which would be enabled by the ACE Project	<ul style="list-style-type: none"> <li>To institute Trade Technical Committee to promote awareness on Trade Facilitation &amp; International Trade Procedures</li> <li>To provide training and capacity building on Trade Facilitation &amp; International Trade Procedures</li> <li>To provide for ongoing dialogue and advocacy on Trade Facilitation between Government &amp; Private sector</li> <li>To build Capacity in WTO Rules and Regulations</li> <li>To build Capacity in ICT, especially in solutions delivery for Trade Facilitation challenges</li> <li>To harmonize &amp; streamline cargo clearance procedures</li> <li>To automate and inter-link all trade facilitation bodies by 2016</li> </ul>	GIEPA/MoTIE/GRA/WTO/UNCTAD/ITC	Yes	<b>30,000</b>
		MoTIE/WTO/UNCTAD	Yes	<b>5,000</b>
		GIEPA/MoTIE/GRA /Trade Facilitation Bodies	Yes	<b>6,000</b>
		MoTIE/WTO	Yes	<b>45,000</b>
		MoI&CT & ICT Businesses	Yes	<b>5,000</b>
		GIEPA/GCP/GRA /Customs /MoFEA	Yes	<b>10,000</b>
		GRA/GPA/MOICI/Private IT Businesses	Yes	<b>150,000</b>
Government to enact legislation and regulations for the Public Private Partnership, which would be used to promote investments in Transportation & Trade Facilitation	<ul style="list-style-type: none"> <li>To advocate and sensitize businesses on PPP through consultative workshops</li> <li>To attract investment in Transport &amp; Trade Facilitation through PPP</li> <li>To prepare Cabinet Paper on PPP</li> <li>To enact Legislation &amp; Regulations on PPP</li> </ul>	GIEPA/MoTIE /Commonwealth/others	Yes	<b>11,000</b>
		GIEPA/GCCA	Yes	<b>65,000</b>
		MoTIE/GIEPA	No	<b>0</b>
			Yes	<b>150,000</b>
Implement the Quality Policy pillars of standardization, conformity assessment, accreditation and metrology	<ul style="list-style-type: none"> <li>To seek TA on Standards from multilateral/Bilateral cooperation through MOFAIC&amp;GA</li> <li>To identify Gaps in standards and conformity assessment services with TA from multilateral institutions</li> <li>To undertake consultative engagements to identify relevant international standards</li> <li>To enter into partnership initiatives with WA-EU</li> </ul>	MoTIE/MoFA/TGSB	No	<b>0</b>
		WAQP/NSCPSC/OVP	Yes	<b>15,000</b>
		TGSB/NSCPSC/OVP	Yes	<b>250,000</b>
		WAQP/NSCPSC	Yes	<b>6,000</b>

	Pact experts and AGOA/NEPAD experts for assistance to ensure implementation of international standards			
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## TELECOMMUNICATIONS

**VISION:** To become a world class telecommunications center with a diverse, reliable, and affordable telecommunications infrastructure integrated into the global information highway with business opportunities in data processing and disaster recovery services.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Promote and undertake investments to improve the telecoms infrastructure
2. Implement the Government’s Science & Technology Park and the Silicon Valley Development Plan of Vision 2020
3. Attract businesses through PPP and investment promotion initiatives to establish Call Centers, Disaster Recovery, Data Processing Centers, and Telecoms & ICT manufacturing & assembling plants
4. Encourage through legal and regulatory frameworks incentive schemes for Telecoms and telecommunication service providers to expand their services in the rural areas as contained in the Telecoms Act
5. Given time zone and English speaking advantages leverage ACE Project and establish call-centers, disaster recovery and data processing centers

*STRATEGIC ISSUES:*

The Telecommunications sub-sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Inadequate technical skills
2. Poor physical infrastructure
3. Low literacy rate
4. Poor internet coverage in rural areas
5. Reliable Energy

*ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Establish Bilateral relations for IT exchange programs & capacity building in IT Skills
2. Promote and undertake investments to improve the telecoms infrastructure
3. Ensure full implementation of the Government’s Science & Technology and the Silicon Valley Development Plan of Vision 2020
4. Encourage through Legal & Regulatory frameworks incentive schemes for Telecommunication Service Providers to expand their services in the rural areas

**OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES**

1. Establish Bilateral relations for IT exchange programs & capacity building in IT Skills
2. Promote and undertake investments to improve the telecoms infrastructure
3. Implement the Government’s Science & Technology & Silicon Valley Plan of Vision 2020
4. Encourage through incentive schemes for Telecommunication Service Providers to expand their services in the rural areas
5. Given time zone and English speaking advantages leverage ACE Project and establish call-centers, disaster recovery and data processing centers

**STRATEGY FRAMEWORK**

*Table 21*

<b>OBJECTIVE</b>	<b>STRATEGY</b>	<b>Implementing Agency</b>	<b>Cost Implication</b>	<b>US\$ Cost Estimate</b>
Establish Bilateral relations for IT exchange programs & capacity building in IT Skills	<ul style="list-style-type: none"> <li>• To establish bilateral exchanges with bilateral &amp; multilateral partners in efforts to develop technical skills in telecommunications</li> <li>• To provide tax incentive packages for Telecoms operators to entice them to increase investment in capacity building</li> </ul>	MoHERST/MoFA/NTA UTG/GIEPA / MoFEA/MoICI	No	<b>0</b>
		Operators/MoTIE/MoFA MoFEA/GIEPA /GRA	No	<b>0</b>
Promote and undertake investments to improve the telecoms infrastructure	<ul style="list-style-type: none"> <li>• To provide advocacy for infrastructural investment through PPP initiatives</li> </ul>	GIEPA/ MOICI/Telecoms Operators/MoFEA	Yes	<b>914,000</b>
Implement the Science & Technology and the Silicon Valley Development Plans of Vision 2020	<ul style="list-style-type: none"> <li>• To create Science &amp; Technology Cluster &amp; fast track the implementation of the ICT Park</li> <li>• To embed Science &amp; Technology tertiary scholarship program</li> <li>• To provide advocacy for infrastructural investment through PPP initiatives</li> </ul>	MoHERST/UTG / MoICI/ GIEPA	Yes	<b>168,500,000</b>
		MoFA/UTG/MoHERST	No	<b>0</b>
		MoHERST/UTG / MoFA	Yes	<b>118,680</b>

## FINANCIAL SERVICES

**VISION:** To transform The Gambia into a formidable sub-regional financial services centre providing requisite financing for economic development.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Encourage investment in mortgage, development, agriculture, and investment banks
2. Deepen & broaden the Financial sector instruments
3. Creation of a Capital Market along with a regulatory body
4. Legislation and enforcement of a policy mandating all relevant businesses to keep audited accounts
5. Broadening of the Tax Base of the economy through formalizing of the informal sector
6. Streamline the tax regime to make The Gambia more attractive for investments

*STRATEGIC ISSUES:*

The Financial Services sub-sector is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Limited banking products & services
2. Lack of Stock Exchange
3. Absence of credit rating agencies and collateral registrars
4. Low level of financial intermediation
5. Limited number of first class international banks
6. Increasingly high number of non performing loans (NPLs)

*ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Encourage investment in mortgage, development, agriculture, and investment banks
2. Facilitate and revive the dialogue on the establishment and creation of a Stock Market & its regulatory body
3. Central Bank to enforce provisional regulation on compliance by banks with the mandatory credit reporting on NPL of debtors and eventually to extend to the Mass Market
4. Broaden the tax base of the economy and formalize the informal sector
5. Encourage investment and participation of first class international banks

*OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES*

1. Encourage greater lending by Commercial Banks in the Real Sectors of the economy
2. Deepening & broadening of the Financial Industry
3. Creation of a Capital Market along with a regulatory body
4. Legislation and enforcement of a policy mandating all registered businesses to have their accounts audited

5. Broadening of the Tax Base of the economy through formalizing of the informal sector
6. Introduction of collateral register to fast track realization of collateral by banks.

**STRATEGY FRAMEWORK**

*Table 22*

<b>OBJECTIVE</b>	<b>STRATEGY</b>	<b>Implementing Agency</b>	<b>Cost Implication</b>	<b>US\$ Cost Estimate</b>
Encourage greater lending by Commercial Banks in the Real Sectors of the economy	<ul style="list-style-type: none"> <li>• To engage the Bankers Association to dialogue on the Strategic Objective</li> <li>• To create awareness on the benefits of account record keeping</li> <li>• To use moral suasion to have firms and businesses to keep annual audited accounts</li> <li>• Review the Mortgage Act (2003)</li> </ul>	CBG/ MoFEA/ Gambia Bankers Association (GBA)/GIEPA	Yes	<b>120,000</b>
		CBG/MoFEA/MoJ/ Lead Accounting & Auditing Firms	Yes	<b>50,000</b>
		CBG/MoFEA/Lead Account/Audit Firms	Yes	<b>15,000</b>
		CBG/Gambia Bankers Association/MoJ/ MoFEA	Yes	<b>15,000</b>
Deepen & broaden the Financial Industry	<ul style="list-style-type: none"> <li>• To broaden the financial instruments offered by the CBG to include Medium Term and Long Term Financing Instruments</li> <li>• To extend provisional regulation on banks for compliance with the mandatory credit reporting on NPL of debtors to the Mass Market</li> <li>• To encourage investment and participation of first class international banks</li> </ul>	CBG/MoFEA/GIEPA	Yes	<b>410,000</b>
		CBG/MoFEA/MoJ/ Bankers Association/Business Associations	Yes	<b>51,600</b>
		CBG/MoFEA/GIEPA	Yes	<b>70,000</b>
Creation of a Capital Market along with a regulatory body	<ul style="list-style-type: none"> <li>• To Facilitate and revive the dialogue on the establishment and creation of a Stock Market &amp; its regulatory body</li> <li>• To undertake a study Tour to Sub-regional Countries with well established Stock Market to learn Best Practices and to arrange for Technical Assistance</li> <li>• To seek Donor support in the establishment of a Stock Market &amp; a Regulatory Body</li> <li>• To develop and build capacity in administration of a stock market and regulatory body</li> </ul>	MoTIE/MoFEA/CBG /GIEPA/MoJ/GCC	Yes	<b>75,000</b>
		CBG/MoFEA/GIEPA /PURA/MoJ/ MoFAIC&GA	Yes	<b>55,000</b>
		CBG/MoFEA/GIEPA /MoFAIC&GA	Yes	<b>775,000</b>
		CBG/MoFEA/MoJ/GCC	Yes	<b>200,000</b>

Broaden the Tax Base of the economy through formalizing of the informal sector	<ul style="list-style-type: none"> <li>To promote dialogue on the objective</li> </ul>	GIEPA/GRA/MoFEA	Yes	20,000
	<ul style="list-style-type: none"> <li>To undertake study tour with the objective of developing a strategy to streamline and reduce the tax rate</li> </ul>	GIEPA/GGCP/GRA /MoFEA	Yes	85,000
	<ul style="list-style-type: none"> <li>To undertake for Municipality Councils to have petty traders and Micro, Small &amp; Medium Enterprises to formally register their businesses</li> </ul>	MoLG&L	Yes	300,000

## HUMAN RESOURCE DEVELOPMENT

**VISION:** To enhance and improve vocational and skilled based training institutions and diversify into science and technology institutions and promote entrepreneurship as a component of the country's school curriculum.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Build and develop professional, academic and technical skills capacity of the general populace
2. Enhance and broaden vocational training with reputable certification programs
3. Diversify the human resource base from its current bias for white-collar jobs into blue collar jobs
4. Promote the establishment of incubation centers to develop business acumen
5. Promote the establishment of business cluster centres to promote entrepreneurship

**STRATEGIC ISSUES:**

Human Resource Development is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Inadequate trained personnel to fill real sector employment opportunities, especially in agriculture, hospitality and manufacturing sectors
2. Inadequate national training programs to ensure sustainability in availability of HR capacity
3. High student/teacher ratio, which impacts negatively on quality of education at Basic and Secondary levels of education
4. Inadequate accreditation programs for teachers at Basic and Secondary levels of education
5. Proliferation of tertiary level training institutions that are not effectively regulated
6. Inadequate support services to effectively utilize the available trained personnel



**ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS**

1. Institute a tax incentive scheme (rebates) to encourage private businesses, especially those in the hospitality and manufacturing sectors, to invest in HR development
2. PMO, UTG, NTA & private Training Institutes to develop national training programs to meet the HR capacity needs of businesses, especially in technical competencies
3. Attract and train more qualified teachers to improve high student/teacher ratio
4. Institute a robust accreditation program to ensure sustainability in the number of qualified teachers
5. Institute a more robust certification and monitoring program for all tertiary level institutions that provide training and certification courses
6. Provide adequate administrative, financial and logistical support services

**OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES**

1. Strengthen the capacity of training institutions to provide appropriate training to meet the capacity challenges of the country
2. Institute a tax incentive or rebate scheme to encourage private businesses, especially those in the hospitality and manufacturing sectors, to invest in HR development
3. Develop National Training Programs to meet the capacity needs of businesses
4. Institute a robust accreditation program to ensure sustainability in the number of qualified teachers
5. Institute a more robust certification and monitoring program for all tertiary level institutions that provide training and certification courses
6. Develop proposals and seek funding to assist the existing institutions and human resources capacity

**STRATEGY FRAMEWORK**

*Table 23*

OBJECTIVE	STRATEGY	Implementing Agency	Cost Implication	US\$ Cost Estimate
Provide appropriate training to meet the capacity challenges of the country	<ul style="list-style-type: none"> <li>• To institute robust and sustainable training programs in the hospitality, manufacturing, agricultural sectors and science &amp; technology</li> </ul>	MoBSE / PMO/ MoHERST/MoTC/ MoA/NTA/AGM/	Yes	<b>150,000</b>
	<ul style="list-style-type: none"> <li>• Strengthen the capacity of training institutions</li> </ul>	MoHERST/MoTC/ NTA/MDI/GTTI	Yes	<b>2,000,000</b>
	<ul style="list-style-type: none"> <li>• Develop National Training Programs to meet the capacity needs of businesses &amp; Government</li> </ul>	NTA/GTHI/MDI /GTTI/UTG/	Yes	<b>50,000</b>
	<ul style="list-style-type: none"> <li>• To review and upgrade the curriculum programs of the technical training institutes to reflect the needs of businesses, especially the dearth in technical skills</li> </ul>	MoHERST/NTA/GTTI	Yes	<b>100,000</b>
	<ul style="list-style-type: none"> <li>• To attract and train more qualified teachers to improve student/teacher ratio</li> </ul>	MoBSE/MoHERST	Yes	<b>2,000,000</b>

Encourage private businesses investment in HR development	<ul style="list-style-type: none"> <li>To institute a tax incentive or rebate scheme as encouragement for private sector investment in HRD</li> </ul>	MoFEA/ MoTIE/GRA/GIEPA	Yes	<b>240,000</b>
Enhance and increase the number of accredited training professionals	<ul style="list-style-type: none"> <li>To institute a robust accreditation program to ensure sustainability in the number of qualified teachers</li> <li>To create private HRD accreditation bodies</li> <li>To institute a sustainable monitoring evaluation program on all tertiary level institutions providing training and certification courses</li> <li>To provide incentive schemes to attract qualified people into the teaching profession</li> </ul>	MoBSE / MoHERST //UTG	Yes	<b>1,000,000</b>
		NTA/MoHERST/UTG	Yes	<b>50,000</b>
		NTA/MoHERST/UTG	Yes	<b>100,000</b>
		MoHERST/MoBSE /GTU/ MOFEA/PMO	Yes	<b>150,000</b>
Retain trained and skilled human resource personnel	<ul style="list-style-type: none"> <li>To develop appropriate incentive schemes such as improved working condition, training, and capacity development</li> </ul>	PMO/MoHERST /MoBSE	Yes	<b>350,000</b>

## RESEARCH & DEVELOPMENT

**VISION:** To make R&D an essential component of the national economic development framework with the capability to contribute cutting edge scientific, business, and policy solutions to economic development challenges.

To realize the above vision, the following broad objectives will be pursued:

**OBJECTIVES:**

1. Institutionalize R&D in major sectors driving the economy
2. Improve data collection and analysis
3. Inculcate an R&D culture in the school curriculum including the basic level
4. Improve GBoS capacity to ensure data availability on key economic sectors
5. Enhance the capacity of NARI for R&D support

*STRATEGIC ISSUES:*

Research & Development is confronted with the below challenges, which would have to be addressed in order to achieve the above outlined objectives:

1. Inadequate budgetary allocation for R&D
2. Poor scientific orientation in national educational curriculums
3. Absence of national R&D funding and support initiatives
4. Lack of a Research and Development policy
5. Lack of sufficient data to inform R&D strategy

*ACTIVITIES TO CONVERT THE ABOVE CHALLENGES INTO STRENGTHS*

1. Prioritize R&D needs of the country and ensure sufficient budgetary support to finance R&D
2. Reorient higher education school curriculums to become more science and research based to spur interest, knowledge and skills in research and innovation.
3. Create more innovative R&D institutions
4. Build on the existing Science & Technology Policy to develop a National R&D Policy.
5. Build the capacity of GBoS to increase data availability in key sectors of the economy

*OBJECTIVES FOR MATCHING SECTOR STRENGTHS WITH SECTOR OPPORTUNITIES*

1. Prioritize R&D needs of the country and ensure sufficient budgetary support to finance R&D
2. Reorient higher education school curriculums to become more science and research based to spur interest, knowledge and skills in research and innovation.
3. Create more innovative R&D institutions
4. Build on the existing Science & Technology Policy to develop a National R&D Policy
5. Build the capacity of GBoS to increase data availability in key sectors of the economy

**STRATEGY FRAMEWORK**

*Table 24*

<b>OBJECTIVE</b>	<b>STRATEGY</b>	<b>Implementing Agency</b>	<b>Cost Implication</b>	<b>US\$ Cost Estimate</b>
Prioritize R&D needs of the country	<ul style="list-style-type: none"> <li>• To undertake a situational analysis of the current state of R&amp;D facilities by a consultant &amp; to assess new areas of need for R&amp;D</li> </ul>	MoHERST/UTG	Yes	<b>100,000</b>
	<ul style="list-style-type: none"> <li>• To establish an Institution/Agency through an Act of Parliament to administer National R&amp;D initiatives</li> </ul>	MoFEA/UTG/MoHERTS	Yes	<b>100,000</b>
	<ul style="list-style-type: none"> <li>• Provide sufficient budgetary support to finance R&amp;D</li> </ul>	MoFEA/Parliament	Yes	<b>5,000</b>
Promote interest, knowledge and skills in research and innovation	<ul style="list-style-type: none"> <li>• To undertake review of the school curriculum in line with the strategic objective</li> </ul>	MoHERST / UTG/GAMJOBS	Yes	<b>50,000</b>
	<ul style="list-style-type: none"> <li>• To establish a R&amp;D cluster centre</li> </ul>	MoHERST/UTG /GIEPA	Yes	<b>2,600,000</b>
	<ul style="list-style-type: none"> <li>• To embed annual Science &amp; Technology inter-school competition and UTG level</li> </ul>	MoHERST/UTG	Yes	<b>20,000</b>
	<ul style="list-style-type: none"> <li>• To embed Science &amp; Technology Scholarship Programmes at High Schools and the University</li> </ul>	MoHERST/UTG/PMO	Yes	<b>350,000</b>
Strengthen existing R&D and create	<ul style="list-style-type: none"> <li>• To establish the requisite R&amp;D institutions through the support</li> </ul>	MoHERST/UTG /MoA	Yes	<b>55,000</b>

more innovative R&D institutions	of TA from identified multilateral and bilateral	MoHERST/ MoFAIC&CA /UTG	Yes	<b>360,000</b>
	<ul style="list-style-type: none"> <li>To build the capacity of GBoS and NARI, amongst other existing institutions to increase data availability in key sectors of the economy</li> </ul>	MoFEA/MoTIE	Yes	<b>100,000</b>
	<ul style="list-style-type: none"> <li>To increase capacity in the areas of data &amp; statistical clerks; economists; and data analysts</li> <li>To upgrade GBOS database</li> </ul>	MoFEA/GBoS	Yes	<b>250,000</b>
Build on the existing Science & Tech. Policy to develop a National R&D Policy	<ul style="list-style-type: none"> <li>To upgrade the existing Science &amp; Technology Policy into a National R&amp;D Policy</li> </ul>	Parliament/MoHERST /UTG/Other relevant Ministries & Agencies	Yes	<b>250,000</b>

## SECTION 5

## FINANCING THE NATIONAL EXPORT STRATEGY

Funding for the financing of the National Export Strategy is one of the key success factors for effective implementation of the NES and without which the export promotion and export development aspirations of the country would not be realized.

Three sources of funding are envisaged for the implementation of the National Export Strategy. These are Government funding through the creation of an NES Fund from surcharges levied on imports, support from the international community through a Donor's Roundtable on the NES, and support from bilateral and multilateral institutions through the provision of Technical Assistance (TA) on the implementation of some of the sector, sub-sector, and cross-cutting sub-sector identified strategies.

### GOVERNMENT FUNDING

The conventional approach of government subvention for funding of export development and export promotion initiatives is an approach that has failed to deliver the goals and objectives of most developing countries National Export Strategies. Among the primary reasons for the lackluster performance of National Export Strategies that depended on government subvention are:

- (i) Limitations in government funding as a result of the peculiarities of the economies of most developing countries – the size of the informal sector and hence the limited revenues collected by governments for funding of its various budgetary commitments
- (ii) Dependence on revenues from commodities whose prices are easily impacted by fluctuations in world demand, vagaries of nature, and other external shocks (oil prices, for example), which negatively impact on budgetary commitments
- (iii) Unplanned and unbudgeted national emergencies and contingencies that often calls for compromises and reduction on budgeted commitments
- (iv) Export development and Export promotion is a costly business with a short to medium term (3-5 years) gestation period before the impact of such initiatives begin to show results in terms of their goals and objectives and which often times discourage government commitment
- (v) Multilateral Institutional requirements on most developing country governments to control fiscal expenditures which impact on government budgetary allocations and commitments

It is for the above reasons that most government funding for Export development and Export promotion initiatives are now done through a Fund scheme where the financing of the NES Fund, for example, would be by way of surcharges on imports collected through customs and administered through the Ministry of Finance and disbursed through the

Central Bank. The establishment of such a Fund is often through the support and enactment of legislation at the level of Parliament, where once enacted it becomes statutory and binding on all stakeholders responsible for its implementation and administration. It is this scheme that is envisaged for the funding of the National Export Strategy of The Gambia.

The funds allocated from the NES Fund for the implementation of the NES strategies would be used for the below activities:

- (i) Product Development
- (ii) Marketing and Market Development activities of Export Development & Export Promotion
- (iii) Financing of the Strategic Action Plans itemized on all NES priority sectors

## **DONOR FUNDING**

Donor funding is imperative for the successful implementation of the NES and the achievement of its goals and objectives. Funding is imperative because it is a bridge finance that is intended to address the shortfall between the cost of the National Export Strategy and the funding from the NES Fund.

As per the strategies outlined in the NES document, Donor funding support is to be sought from the Multilateral Institutions through a Donor's Roundtable with the support of the Commonwealth Secretariat. Some of the NES strategies where Donor support is needed are:

- (i) Development of a Trade Facilitation framework to ensure Export Competitiveness
- (ii) Development of an ICT based Trade Facilitation framework
- (iii) Development of a Public Private Partnership framework
- (iv) Development of human resource capacity in International Trade Protocols and Procedures
- (v) Improvement in Tourism Standards
- (vi) Packaging & Labeling
- (vii) Trawl & Acoustic Fish Stock surveys
- (viii) Resuscitation of the National Agricultural Research Institute to enable it conduct relevant research in the sectors of the NES
- (ix) Logistics & Supply Chain Management
- (x) Establishment of a Logistics & Supply Chain Management Centre of Excellence

In line with the above Donor support requirements, support would be sought from the Multilateral Institutions of the EU, UN, WB, USAID, AusAid, GTZ, and JETRO. At the country level, Donor support would be sought from the UNDP, US Embassy, Taiwanese Embassy, Action Aid, and IRD.

## **REQUISITE TECHNICAL ASSISTANCE & SUPPORT**

Technical Assistance would be sought from the Multilateral and Bilateral relationships of the country. Technical Assistance would be sought in the areas of:

- (i) Development of Standards and ISO certifications
- (ii) Development of Quality Infrastructure
- (iii) Development of local Accreditation bodies in Standards and Quality Infrastructure on target sectors of the NES
- (iv) Development of Technical Skills in Manufacturing and processing activities
- (v) Development of Technical Skills in Packaging and Labeling
- (vi) Development of Technical Skills in Trawl & Acoustic Fish Stock Surveys
- (vii) Development of Technical Skills in Product Development & Product Marketing
- (viii) Development of Technical Skills in Logistics & Supply Chain Management
- (ix) Food Hygiene

In line with the above Multilateral and Bilateral support requirements, support would be sought from the Multilateral Institutions of the AfDB, WATH, WTO UNCTAD, ITC, FAO, IFC, NORAD, STDF, FODEX, KOTRA, and Nigerian Institute for Oceanography & Marine Research.

At the Bilateral and country level, Technical Assistance would be sought from the US Embassy, Taiwanese Embassy, Nigerian Embassy, WAQP, MATRADE, and KOTRA.

## **COSTING OF THE NATIONAL EXPORT STRATEGY**

The costing for the National Export Strategy was undertaken through consultative engagement with all the lead institutions and organizations of the priority NES sectors, sub-sectors, and cross-cutting sub-sectors. Lead personnel identified during the National Export Strategy validation were tasked to consult with the institutions and organizations identified for the implementation of the strategies to meet and identify the activities that would achieve the strategies. The costing for the identified activities constituting the respective priority sector and sub-sector strategies of the NES constitutes the costs identified within the NES Strategic Framework.

The costing of the activities was completed using a template developed by the Project Manager. For the purpose of an effective monitoring of the activities constituting the various priority sector and cross-cutting sub-sector strategies, all the activities constituting the NES Strategic Framework are captured in one Excel workbook composed of the different NES Priority sector and Cross-cutting sub-sector worksheets.

Indicative dates for the achievement of the activities are also identified. This is to ensure an effective M&E. In the costing of the NES activities, there are activities that are cross-cutting. For such activities, only one costing is undertaken.

From the indicative costing undertaken, the implementation of the NES strategies is to be realized at an indicative cost of US\$430.76 million. The indicative total cost is expected to be financed from a combination of funding sources. These sources are the NES Fund, which is to be developed from the levying of an excise duty on imports and donor funding. The donor funding is expected to be from both bilateral and multilateral sources.

### Summary of Priority Sectors Strategy Implementation Cost

*Table 25*

SECTOR	COST IN U.S. DOLLARS	EQUIVALENT IN DALASI
Groundnut	4,320,669	118,818,410
Cashew	1,316,000	36,190,000
Fisheries	9,867,500	271,356,250
Horticulture	56,152,364	1,544,840,000
Tourism	49,976,000	1,374,340,000
Manufacturing	558,300	15,353,250
Re-exports	124,955,000	3,436,262,500
Transport & Trade Facilitation	1,350,250	37,131,875
Telecommunication	169,582,680	4,663,523,700
Financial Services	2,241,600	61,644,000
Human Resource Development	6,190,000	170,225,000
Research & Development	4,340,000	119,350,000
<b>Monitoring &amp; Evaluation</b>	150,000	4,125,000
<b>Total Cost</b>	<b>US\$431,000,363</b>	<b>GMD11,853,159,985</b>

## SECTION 6



## **IMPLEMENTATION, MONITORING & EVALUATION**

The National Export Strategy is to be implemented through a National Export Strategy Implementation Committee (NES Committee), which would be composed by lead Government institutions, Non-Government Organizations, and the Private Sector. The Government institutions, NGOs, and Private sector constituting the NES Steering Committee would be those directly engaged in economic activities of the priority areas of the NES.

## **IMPLEMENTING AGENCIES, INSTITUTIONS, & PARASTATALS**

The NES Implementation Committee will be constituted by:

- The Ministry of Finance and Economic Affairs
- The Ministry of Trade, Industry, Regional Integration & Employment
- The Ministry of Information, Communication and Infrastructure
- Gambia Investment & Export Promotion Agency
- Department of Agriculture
- Gambia Tourism Board
- Central Bank of The Gambia
- Gambia Revenue Authority
- Gambia Ports Authority
- Gambia Bankers Association
- Gambia Groundnut Corporation
- Food & Agricultural Organization
- University of The Gambia
- National Training Authority
- Association of Gambian Manufacturers
- Gambia Chamber of Commerce & Industry
- Association of Clearing and Forwarding Agencies
- Gambia Standards Bureau
- Concern Universal
- International Relief for Development
- TANGO
- Gambia Transport Owners & Haulage Association
- Gambia Transport Control Association

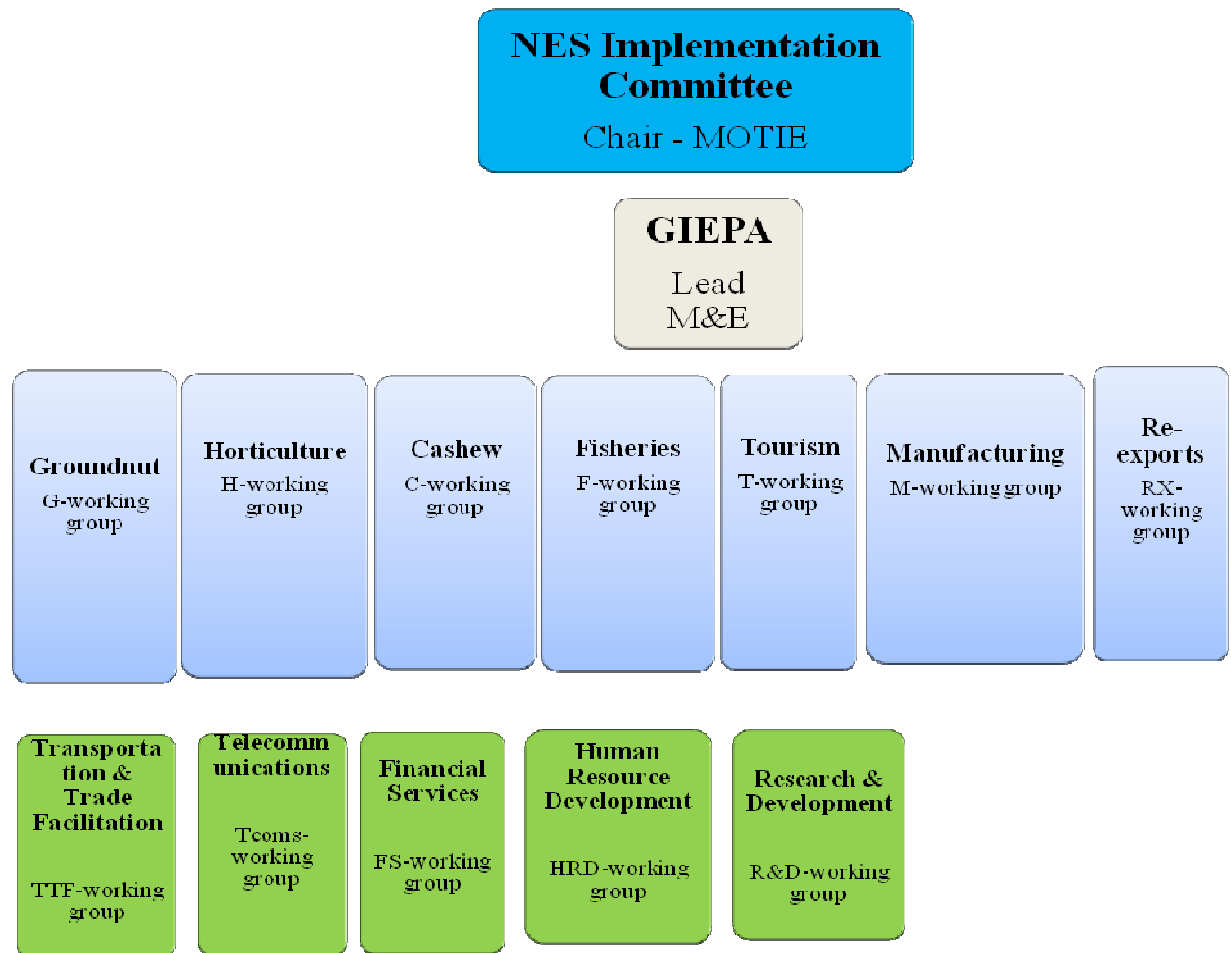
## **IMPLEMENTATION PLAN & MONITORING STRATEGY**

The 23-member Steering Committee would be responsible for oversight of the implementation of the strategies identified within the priority areas of the NES. However, the actual implementation of the strategies would be the responsibility of the lead institutions identified within the strategies as the implementing agencies. As the lead institutions in the development of the NES, the Gambia Investment & Export Promotion Agency would be responsible for the Monitoring and Evaluation of the implementation of the NES Strategies and would be accountable for updating the NES Steering Committee on progress made in the implementation of the NES strategies and calling up of periodic (once quarterly) meetings to review progress and challenges in efforts to enable the Steering Committee to take appropriate measures for successful implementation. As such, the Working Groups would also be obligated to report to GIEPA on a bi-monthly basis, on the progress in the implementation of the activities of their NES strategies. For an effective implementation of the NES blueprint, it is recommended to institute the following:

- (1) Develop a NES Management Information System (MIS) that would capture all the identified strategies of the NES priority areas along with the identified activities and timelines for their implementation. This would ensure for an effective M&E.
- (2) The NES Steering Committee would have oversight of the M&E MIS platform through periodic reporting from GIEPA.
- (3) GIEPA would be accountable for tracking and follow-up of the MIS performance criteria and reporting periodically to the NES Steering Committee on achievements and challenges emanating from implementing the strategies

For an effective Monitoring and Evaluation of the National Export Strategy priority sector activities, an M&E platform comprising of an M&E Database, an M&E personnel, and the requisite IT software and hardware must be put in place. Indicatively, the M&E platform will cost US\$150,000.

## **Implementation, Monitoring & Evaluation Chart**



The respective working groups, example G-working Group, H-Working Group, etc would be constituted by the implementing agencies identified within the strategies of the respective priority sectors & sub-sectors.

## References

In the development of the National Export Strategy blueprint, references were made to the following **National Documents**:

1. CAP:EU/ACP
2. Customs Act 2010
3. Diagnostic Trade Integrated Study, July 2007
4. ECOWAS Protocols: CET/ETLS/Rail & Road Transit
5. IMF Country Reports (various periodic reports)
6. Institutional Review of the Gambia Tourism Authority, Nov. 2008
7. Micro Small & Medium Enterprise Policy
8. Ministry of Tourism & Culture – A Business Plan for the Development of Tourism, Nov. 2010
9. National Employment Policy & Action Plan
10. National Industrial Policy 1996
11. The Gambia Growth & Competitiveness Project, Sept. 2010
12. The Gambia National Agricultural Investment Programme 2011-15
13. The Gambia Tourism Development Master Plan, July 2006
14. The Gambia Trade Policy Review by the WTO 2010
15. Trade Policy 2011
16. West Africa Common Industrial Policy (ECOWAS)
17. World Bank – Cost of Doing Business Index, 2011
18. World Bank Development Reports on The Gambia
19. WTO Documents relating to TRIPS/GATT/GATS

Reference was also made to the following **Bilateral Investment Agreements** between the Government of the Gambia and:

1. Qatar
2. United Kingdom
3. Northern Ireland
4. Netherlands
5. Guinea Conakry
6. Mauritania
7. Ukraine

Reference was also made to the below **Bilateral Trade Agreements** between the Government of the Gambia and:

1. Tunisia
2. Mauritania
3. Guineas Conakry
4. Cuba
5. Senegal

## **Annexes**

## **Annex 1**

### **THE NATIONAL EXPORT STRATEGY COMMITTEE MEMBERS**

<b>NAME</b>	<b>INSTITUTION</b>	<b>POSITION</b>
Naffie Barry	Ministry of Trade, Industry, Regional Integration & Employment	Permanent Secretary
Mod Secka	Ministry of Finance & Economic Affairs	Permanent Secretary
Ada Gaye	Ministry of Agriculture	Permanent Secretary
Fatou Mbenga Jallow	Gambia Investment & Export Promotion Agency	Chief Executive Officer
Benjamin A. Roberts	Gambia Investment & Export Promotion Agency	Director
Sait Mboob	Gambia Investment & Export Promotion Agency	Business Development Manager
Momodou Zack Sowe	Gambia Investment & Export Promotion Agency	Export Development Manager
Dr. Touray	National Codex Sanitary & Phytosanitary Committee	Chairman
Joseph Njie	Gambia Revenue Authority	Tariff Manager
Joseph Ndenn	West Africa Quality Programme	Project Coordinator
Mohammed Sillah	Association of Gambia Manufacturers	President
Bamba Banja	Department of Fisheries	Director
Alagie Laye	Gambia Tourism Board	Product Development Officer
Pansaw Nyassi	Gambia Chamber of Commerce & Industry	Business Development Officer
Bumi Camara	University of the Gambia	Director
Aisatou Sey	Gambia Competition Commission	Director
Alagie Sillah	The Association of Gambian Fishing Companies	Executive Secretary
Momodou Ceesay	Gambia Horticultural Enterprise	Proprietor
John Cardos	Natiponal Farmers Platform	President, KM
Sulayman M. Joof	Association of Clearing & Forwarding Agents	Secretary General
Setti Suwareh	Association of Cashew Alliance	Member
Momodou Mass Jobe	NAPFAG	Secretary
Mamour M. Jagne	Gambia Bankers Association	President
Hadrammeh Sidibeh	TANGO	Accountant
Tabu Sarr	TANGO	Programme Officer
Madi Jobarteh	TANGO	Programme Manager
Banky Oliver Njie	Concern Universal	General Manager, Gambia Is Good
Kelly Taboure	Concern Universal	Farm GIG Manager
Momodou Wuri Jallow	Action Aid The Gambia	Manager
Omar Kanteh	Women's Bureau	Deputy Director

## **Annex 2**

### THE NATIONAL EXPORT STRATEGY DRAFTING TEAM

<b>NAME</b>	<b>INSTITUTION</b>	<b>POSITION</b>
Benjamin A. Roberts	Gambia Investment & Export Promotion Agency	Director
Sait Mboob	Gambia Investment & Export Promotion Agency	Manager
Dr. Bamba Banja	Department of Fisheries	
Aisatou Sey	Gambia Competition Commission	Director
Bumi Camara	University of The Gambia	Director

### Annex 3

## THE NES SECTOR STRATEGY ACTIVITIES COSTINGS

<b>GROUNDNUT VALUE CHAIN STRATEGY ACTIVITIES COSTINGS</b>				
US\$/GMD 27.5				
No.	STRATEGY	ACTIVITIES	COST - GMD	US\$ Equivalent
1	Attract investment into the sector through public private partnership initiative	*Preparation of clearly defined policy for cooperative organization - GMD500,000 **Re-structuring of cooperative organization (primary ,secondary apex) - GMD250,000	750,000	27,273
2	Re-introduction of cooperative marketing schemes	*Support institutional organization through training and awareness campaign - GMD750,000 *Facilitation and advocacy for the provision of credit facilities for cooperative organization - GMD250,000 *monitoring and supervision of Cooperative Organizations -	1,500,000	54,545
3	Provide adequate Agriculture extension services and embedded quality infrastructure in the Groundnut value chain	*Training on groundnut production techniques processing, preservation and storage - GMD1,000,000 *Rehabilitation of fifty village seed stores (50) - GMD4,568,410	5,568,410	202,488
4	Invest in R&D and Agricultural extension	*Identification of adaptable and Adoptable groundnut varieties - GMD1,000,000 *Production of foundation and certified groundnut seeds - GMD4,000,000 *Production of foundation and certified groundnuts seeds (NARI) - GMD5,000,000	10,000,000	363,636
5	Improve the conditions and number of river transport	*Re-habilitation of existing groundnut depot facilities *Training on river transportation and depot management	10,000,000	363,636
6	Invest in new jetty and landing sites for new barges	*Purchase of 5 new jetty and construction of 5 new landing sites	80,000,000	2,909,091
7	Improve the capacity and skills of the aflatoxin lab under NARI and Pesticide Residue lab under plant protection services for determination of Minimum Residue Levels (MRLs)	*Purchase of appropriate equipment for the testing of aflatoxin and MRLs for NARI, GGC and plant protection services (DOA) labs	3,000,000	109,091
8	Develop capacities of Agricultural extension personnel on quality assurance systems and good Agricultural practices (GAP)	*Training of Agricultural personnel and farmers on good Agricultural practices - GMD2,000,000 *Upgrading of three existing Mixed Farming Centers for seed multiplication - GMD1,000,000	3,000,000	109,091
9	Strengthen farmer association and private individuals on good agricultural practices	*Training of farmer association members on good agricultural practices *Facilitate provision of farm inputs and credit to farmers through advocacy	5,000,000	181,818
<b>Total Cost</b>			<b>GMD 118,818,410</b>	<b>USD 4,320,669</b>

<b>CASHEW VALUE CHAIN STRATEGY ACTIVITIES COSTINGS</b>				
<b>No.</b>	<b>STRATEGY</b>	<b>ACTIVITIES</b>	US\$/GMD 27.5	
			<b>COST - GMD</b>	<b>US\$ Equivalent</b>
1	To have consultative dialogue with the Cashew Farmer Associations on production expansion	<ul style="list-style-type: none"> <li>•Conduct a comprehensive review of soil types, temperatures and humidity of various regions to determine suitability of cashew production - \$120,000</li> <li>•Establish criteria for farmer association recognition and "code of conduct" to ensure cashew farmer organizations are acting in the best interest of their memberships - \$20,000</li> <li>• Host farmer workshops to introduce the cashew sector in new production areas and to explain the criteria for a cashew farmer association and the role of the farmer in the association - \$50,000</li> <li>•Extend best production practices through GOTG Agricultural and Forestry Service - \$200,000</li> </ul>	10,725,000	390,000
2	To undertake Study Tour (Parastatal & Government) to WATH offices in Ghana & Senegal	<ul style="list-style-type: none"> <li>• Develop study tour agenda, timing, and personnel. Study to include visit to GOG research centers - \$1,000</li> <li>• Send team to Dakar and Accra - \$15,000</li> <li>•Prepare report from study tour - \$1,000</li> </ul>	467,500	17,000
3	To engage Businesses with potential to export on their Technical Assistance needs	<ul style="list-style-type: none"> <li>•Conduct survey of cashew sector stakeholders (private sector) to determine the most common constraints to the sector-\$50,000</li> <li>•Group constraints into categories and organize technical assistance visits. Facilitate technical assistance support from specialists and/or existing in country programs - \$200,000</li> <li>•Produce general directory for support services (i.e. feasibility plans for cashew processing, processing plant management, transportation constraints, RCN sourcing for local processing, etc.) - \$25,000</li> <li>•Conduct business seminars on new trends in cashew business approaches, resources, etc - \$60,000</li> <li>•Establish "One Stop Shop" for cashew info – within the business sector (i.e. GCCI or GIEPA); trained and dedicated staff person responsible for promotion as well as technical support - \$25,000</li> </ul>	9,900,000	360,000
4	To conduct study tours for businesses involved in AGOA priority products at Centers of Excellence in countries that have successfully leveraged AGOA	<ul style="list-style-type: none"> <li>• Identify core businesses (based on private sector assessment, see above)- \$1,000</li> <li>• Organize and conduct study tour within the sub-region to meet directly with business managers who have used AGOA for cashew- \$35,000</li> <li>•Provide technical support to businesses to develop business plans and strategies for accessing AGOA terms. - \$10,000</li> </ul>	1,265,000	46,000



5	To establish organized marketing arrangements of cashew nuts with the goal of having farm gate prices irrespective of the dealer determined by market forces	<ul style="list-style-type: none"> <li>•Support marketing forums to stress emphasis on recognition of quality and differentiation of price based on quality - \$24,000</li> <li>• Training village based organizations on production, collection, and drying practices to support price differentiation for quality nuts- \$200,000</li> <li>• Technical advice for village based collective sales with approved buyers - \$20,000</li> <li>•Creation of buyer registration system to ensure buyers are credible, provide value addition, and operate on fair trade terms - \$50,000</li> <li>•Conduct of regular market surveys (survey procedures and survey to be vetted and accepted by all sector stakeholders) during marketing season- \$50,000</li> </ul>	9,460,000	344,000
6	To introduce standardization in weights & measures in the Cashew Value Chain	<ul style="list-style-type: none"> <li>•Seek Technical assistance to develop national standards policy for both RCN and processed kernel - \$1,000</li> <li>•Dissemination of standards through workshops and "One Stop Shop" point person - \$10,000</li> </ul>	302,500	11,000
7	To provide high quality cashew crop variety to farmers to expand production – on commercial basis	<ul style="list-style-type: none"> <li>•Train (tree) nursery managers in technical and managerial aspects of their business- \$48,000</li> <li>•Initial subsidized tree nurseries to encourage nursery managers to keep cashew varieties on hand - \$25,000</li> <li>•Disseminate variety information to reduce propagation of low yielding/low quality varieties - \$15,000</li> <li>•Conduct village based training on how to care for seedlings to ensure effective rooting of the better varieties.- \$60,000</li> </ul>	4,070,000	148,000
<b>Total Cost</b>			<b>GMD 36,190,000</b>	<b>USD 1,316,000</b>

<b>FISHERIES VALUE CHAIN STRATEGY ACTIVITIES COSTINGS</b>				
<b>No</b>	<b>STRATEGY</b>	<b>ACTIVITIES</b>	<b>US\$/GMD 27.5</b>	
			<b>COST-GMD</b>	<b>US\$ Equivalent</b>
1	To engage WATH, US Embassy and MOTRIE	<ul style="list-style-type: none"> <li>•GIEPA to organize preparatory meetings with fisheries stakeholders - \$10,000</li> <li>•Engage GIEPA to take lead role and engage WATH in the promotion of businesses in the fisheries sector - \$0</li> </ul>	-	-
2	To undertake Study Tour to WATH offices in Ghana & Senegal	<ul style="list-style-type: none"> <li>•GIEPA to make arrangements and undertake study to WATH office in Ghana - \$12,000</li> <li>•GIEPA to make arrangement and undertake study to WATH office in Senegal - \$9,000</li> <li>•GIEPA to share experiences gained from Study Tours with stakeholders - \$15,000</li> </ul>	990,000	36,000
3	To document export procedures into an Export Guide Brochure	<ul style="list-style-type: none"> <li>•Hire consultant to compile/develop export procedures for each sector - \$20,000</li> <li>•Organize validation workshop on draft export procedures, to be finalized by consultant - \$10,000</li> <li>•Printing/ publication and distribution of the export guide - \$9,000</li> </ul>	1,072,500	39,000
4	To seek Cabinet approval on the objective by preparation of a Cabinet Paper on the setting up of a financing scheme to integrate and develop the Fisheries Value Chain	<ul style="list-style-type: none"> <li>•Organise consultation forum to dialogue on the nature and content of Cabinet Paper - \$3,000</li> <li>•Draft Cabinet Paper for endorsement by cabinet - \$0</li> </ul>	-	-
5	To hold an advocacy dialogue on the value chain financing scheme through stakeholder consultation forum	<ul style="list-style-type: none"> <li>•Organise an advocacy consultation forum - \$3,000</li> <li>•Establish a multisectoral committee for advocacy on the fisheries value chain - \$1,000</li> <li>•Organise quarterly multisectoral committee meetings on the fisheries value chain - \$7,000</li> </ul>	302,500	11,000
6	To implement the financing scheme to integrate and develop the Fisheries Value Chain	<ul style="list-style-type: none"> <li>•Hire consultant to conduct or update the fisheries value chain assessment study and come up with recommendations for implementation - \$1,000</li> <li>•Prepare costing estimates for implementation of the Fisheries value chain assessment recommendations - \$1,000</li> <li>•Implementation of the Value chain recommendations - \$4,000,000</li> </ul>	110,055,000	4,002,000
7	To hold PPP consultative workshop on Fisheries	<ul style="list-style-type: none"> <li>•Planning of workshop - \$1,000</li> <li>•Holding of the workshop - \$2,000</li> <li>•Establish PPP committee to discuss and formulate an action plan for implementation in the fisheries sector - \$5,000</li> <li>•Implement action plan for enhancement of investments on the fisheries sector value chain - \$15,000</li> </ul>	632,500	23,000
8	To develop concept proposal for investment in Fisheries Value Chain under PPP initiative	<ul style="list-style-type: none"> <li>•PPP committee develops concept proposals for investment in the fisheries sector value chain - \$5,000</li> <li>•Seek funding for implementation of the proposals for investment on the value chain - \$10,000</li> </ul>	412,500	15,000

9	To promote best practices in Fisheries management	<ul style="list-style-type: none"> <li>•Recruit consultant to develop guide to best practices practical guide for fisheries management - \$7,500</li> <li>•Develop fisheries management plans for specific fishery/fish species - \$20,000</li> <li>•Organize workshop for validation of fisheries management plans with stakeholders - \$7,500</li> <li>•Implement fisheries management plans using guide - \$15,000</li> </ul>	1,375,000	50,000
10	To facilitate TA on Standards through multilateral and bilateral cooperation	<ul style="list-style-type: none"> <li>•Develop concept for technical assistance on standards development - \$5,000</li> <li>•Submit concept to identified bilateral/multilateral cooperation partners for funding - \$0</li> <li>•Identify gaps in Standards with TA - \$15,000</li> <li>•Prepare standards for fisheries products - \$25,000</li> <li>•Incorporate standards into technical regulations - \$5,000</li> <li>•Awareness creation on standards developed for operators /stakeholders - \$15,000</li> <li>•Implementation/enforcement of standards for improved market access - \$300,000</li> </ul>	10,037,500	365,000
11	To implement the recommendations of the Fishery Value Chain Study financed by GAMJOBS	<ul style="list-style-type: none"> <li>•Evaluation of the recommendations on the fishery value chain study - \$5,000</li> <li>•Develop concept or TOR for implementation of the recommendations - \$4,500</li> <li>•Implementation of a actions to address the value chain recommendations - \$4,000,000</li> <li>•Establish M&amp;E on the implementation of the Value chain improvement - \$300,000</li> </ul>	118,511,250	4,309,500
12	To enter into partnership initiatives with WA-EU EPA experts and AGOA/NEPAD experts for assistance to ensure alignment of standards with regional SPS initiatives	<ul style="list-style-type: none"> <li>•Strengthen existing links and initiate dialogue with WA-EU EPA experts and AGOA/NEPAD for alignment of SPS standards with regional initiatives - \$20,000</li> <li>•Acquire TA for the alignment of standards at regional dimension - \$30,000</li> </ul>	1,375,000	50,000
13	To establish capacity of regional fisheries offices directorates to respond better to local needs of fisheries communities and for general management of fisheries resources	<ul style="list-style-type: none"> <li>•Re-establish and strengthen the four regional offices (Jenoi, Bansang, Farafenni &amp; Basse) - \$100,000</li> <li>•Develop capacities of fisheries personnel to adequately administer and manage the regional offices - \$160,000</li> <li>•Strengthen the capacities of fisheries stakeholders for improved fisheries management and development - \$25,000</li> </ul>	7,837,500	285,000

14	To train fisheries operators & staff in fisheries hygiene & record keeping	<ul style="list-style-type: none"> <li>•Identify and develop ToR for the required resource persons - \$1,000</li> <li>•Develop training manuals on fish technology and quality assurance - \$10,000</li> <li>•Develop training manuals on business management and record keeping - \$10,000</li> <li>•Conduct training programmes for fisheries operators and staff on fish technology and quality assurance - \$17,000</li> <li>•Conduct training programmes for fisheries operators on business management and record keeping - \$10,000</li> <li>•Monitor and evaluate the impacts of the training programmes - \$5,000</li> </ul>	1,430,000	52,000
15	To establish links between the Fisheries Lab and international fisheries research institutions	<ul style="list-style-type: none"> <li>•Identify international fisheries research institutions - \$0</li> <li>•Establish links with identified fisheries research institutions - \$0</li> <li>•Collaborate and conduct applied research in fisheries technology and product development - \$100,000</li> </ul>	2,750,000	100,000
16	To establish scientific advisory committee to identify research partners; define research and implement extension programmes to transfer research findings to fisherfolk and other stakeholders	<ul style="list-style-type: none"> <li>•Identify and establish a scientific advisory committee - \$1,000</li> <li>•Develop a ToR for the scientific advisory committee - \$0</li> <li>•Collaborate with fisheries research institutions in relevant research areas - \$120,000</li> <li>•Disseminate research findings to fisherfolk and other stakeholders - \$10,000</li> <li>•Monitor and evaluate the implementation of research findings - \$14,000</li> </ul>	3,987,500	145,000
17	To develop concept notes and investment proposals on Fisheries value Chain for targeted investors	<ul style="list-style-type: none"> <li>•Organize stakeholder forum to identify areas of investment in the Fisheries Value Chain - \$5,000</li> <li>•Develop concept notes and identify targeted investors - \$1,000</li> <li>•Prepare investment proposals - \$15,000</li> <li>•Organize stakeholder forum to validate the investment proposals - \$10,000</li> <li>•Submit investment proposal to targeted investors - \$0</li> <li>•Follow-up on the proposals with targeted investors - \$0</li> </ul>	852,500	31,000
18	To pursue promotion and facilitation of establishment of bilateral relationships with fisheries best practice countries (including Study Tours)	<ul style="list-style-type: none"> <li>•Identify fisheries best practice countries - \$0</li> <li>•Initiate diplomatic dialogue with these countries - \$0</li> <li>•Conduct study tours to these countries - \$51,000</li> <li>•Disseminate experiences learned from study tours to stakeholders - \$4,500</li> <li>•Implement fisheries best practices in the fisheries sector - \$20,000</li> <li>•Monitor and evaluate the implementation of fisheries best practices - \$25,000</li> </ul>	2,763,750	100,500

19	To conduct trawl and hydro-acoustic fish stock assessment	<ul style="list-style-type: none"> <li>•Conduct national preparatory meeting on joint surveys with the Republic of Senegal - \$1,000</li> <li>•Initiate dialogue with the Republic of Senegal on joint trawl and hydro-acoustic surveys of our waters - \$3,000</li> <li>•contribution towards hiring the Senegalese research vessel - \$100,000</li> <li>•Conduct trawl and hydro-acoustic surveys with scientists from the two countries - \$10,000</li> </ul>	3,135,000	114,000
20	To re-engage past donors and sponsors for the re-establishment of TANJI& GUNJUR CFCs	<ul style="list-style-type: none"> <li>•Strengthen existing diplomatic relations with donor and sponsors - \$0</li> <li>•Conduct diplomatic missions to donor countries for the purposes of lobbying to provide support to TANJI and GUNJUR - \$100,000</li> </ul>	2,750,000	100,000
21	To advocate for/sensitization on CFC	<ul style="list-style-type: none"> <li>•Build capacities of CFC stakeholders on good governance - \$5,000</li> <li>•Sensitize the fishing communities - \$5,500</li> <li>•Institute a mechanism for continuous M&amp;E of the CFCs - \$8,000</li> </ul>	508,750	18,500
22	To put in place training programmes to embed Best Practices within CFC	<ul style="list-style-type: none"> <li>•Identify and hire key trainers - \$0</li> <li>•Develop training modules/programmes/proposals on key areas - \$10,000</li> <li>•Implement the identified training programmes - \$6,000</li> <li>•Monitor the impacts of the training programmes - \$5000</li> </ul>	577,500	21,000
<b>Total Cost</b>			<b>GMD 271,356,250</b>	<b>USD 9,867,500</b>

<b>HORTICULTURE VALUE CHAIN STRATEGY ACTIVITIES COSTINGS</b>				
<b>No.</b>	<b>STRATEGY</b>	<b>ACTIVITIES</b>	<b>US\$/GMD 27.5</b>	
			<b>COST - GMD</b>	<b>US\$ Equivalent</b>
1	To organize outward targeted investment missions to Agro Processing	1. Feasibility study (GMD450,000) 2. Market Survey (GMD500,000)	950,000	34,545
2	To promote local Agro Processing ventures initially through development of entrepreneurship at incubation centers	<ul style="list-style-type: none"> <li>• Construction of 1 processing facility in 5 regions</li> <li>• Purchasing of processing equipment/utensils and packaging materials per facility</li> <li>• Training of trainers on Agro-processing</li> <li>• Product promotion</li> </ul>	433,000,000	15,745,455
3	To implement irrigation farming techniques and methods	<b>Borehole:</b> <ul style="list-style-type: none"> <li>* Borehole 6" cased diameter borehole estimated depth of 70 meters including testing &amp; reporting (9,000,000)</li> <li>* Solar pumping unit and headwork estimated daily pumpage 40 cubic meters (2,700,000)</li> <li>* Solar module including support structures and installation (270,000,000)</li> <li>* Elevated steel water storage with an estimated capacity of 5000 L with forum high (5,700,000)</li> <li>* Distribution Network (1,500,000)</li> <li>* Installation and transportation of tanks (750,000)</li> <li>* Stand post tap with ground reservoirs (3,750,000)</li> <li>* Stop valves, chamber fittings and consumable (750,000)</li> <li>* Chain link (2,400,000)</li> </ul> <b>Wells:</b> <ul style="list-style-type: none"> <li>• Provision of fencing material (chain link) Construction of new wells (90 wells) - 6,750,000</li> <li>• Provision of fencing material (chain link) Rehabilitation of existing wells (90 wells) - 2,750,000</li> </ul>	306,050,000	11,129,091
4	To request for Technical Assistance in irrigation, Agro Processing and source funding for these	Hiring of expert	2,500,000	90,909
5	To request for Technical Assistance from International Standards bodies to get horticultural business to become certified in global horticultural certifications	Hiring of expert	2,500,000	90,909
6	To undertake measures to assist horticultural business to understand and meet Market Access guidelines of Standards Products Quality and Packaging & Labeling	<ul style="list-style-type: none"> <li>• Facilitate the construction of wholesale market for horticultural crops with cool storage facilities, packing facilities (3) (1 URR, 1 NBR, 1 WCR, Construction of wholesales market for horticultural crops with cool storage facilities, packing facilities (3) (1Upper river Region, 1North bank Region and 1West Coast Region) - 450,000,000</li> <li>• Road site market stalls (10 stalls) 2 each region</li> <li>• Provision of cool storage van for vegetables</li> <li>• Establish private dealers on horticultural inputs (Basse, Brikamaba, farafenni, Wassu and Jarra Soma)</li> </ul>	473,200,000	17,207,273
7	To invest in cold storage	Construct 2 cool storage in the Peri-urban	300,000,000	10,909,091

8	To carry out studies to ascertain & ensure environment impact on use of fresh water bodies and salt intrusion along the River Gambia	Consultancy	200,000	7,273
9	To promote and encourage cottage industries in Agro Processing of Horticultural Produce	To promote and strengthen the capacity of local processors	5,000,000	181,818
10	To provide logistical support and schemes to help horticultural businesses access the needed inputs necessary for expansion of production	<ul style="list-style-type: none"> <li>•Provision of horticultural inputs (seeds, fertilizers, garden tools and pesticides)-10,000,000</li> <li>• Provision of farm machineries (power tillers)- 5,250,000</li> </ul>	15,250,000	554,545
11	To provide training and capacity building in the areas of farming techniques, agronomy and carrying out of extension services	<ul style="list-style-type: none"> <li>•Extension workers training - 1,600,000</li> <li>• Farmer training - 1,440,000</li> <li>• Farm Demonstrations on vegetable production - 500,000</li> <li>• Networking in the Sub Region - 2,000,000</li> </ul>	5,540,000	201,455
<b>Total Cost</b>			<b>GMD 1,544,190,000</b>	<b>USD 56,152,364</b>

<b>TOURISM VALUE CHAIN STRATEGY ACTIVITIES COSTINGS</b>				
<b>No.</b>	<b>STRATEGY</b>	<b>ACTIVITIES</b>	US\$/GMD 27.5	
			<b>COST - GMD</b>	<b>US\$ Equivalent</b>
1	To attract new investments in unconventional Tourism through PPP initiative	<ul style="list-style-type: none"> <li>•Review investment guidelines and portfolios \$5,000</li> <li>•Participate in international investment fora - \$50,000</li> <li>•Organise investment fora for local and international investors, banks, insurance companies \$10,000</li> <li>•Attract flagship investment in three sites and services in the TDA \$5,000</li> <li>•Provide responsible tourism information data \$3,000</li> </ul>	2,007,500	73,000
2	To implement standards and ensure compliance with star classification of hotels	<ul style="list-style-type: none"> <li>•Establish a minimum standard for tourist hotels and enforce licensing control - \$100,000</li> <li>•Review of investment incentives for improvement - \$50,000</li> <li>•Review all inclusive policy via policy research and study tour - \$40,000</li> <li>•Institute Annual Gambia tourism tourism awards - \$20,000</li> </ul>	5,775,000	210,000
3	To engage in an extensive Rural Area study Tour to identify pristine areas for water-based Leisure and Eco Tourism	<ul style="list-style-type: none"> <li>•Conduct nation wide study tour to identify new pristine areas fo water based leisure - \$10,000</li> <li>•Prepare plans and implment the western river trail - \$150,000</li> <li>•Develop eco-beach and eco-bolong in South Coast and Western River areas - \$4,000,000</li> <li>•prepare plans and implement the Tanji Solifor Riviera \$20,000,000</li> <li>•Prepare plans and implment the Sanyang Santuary project \$17,000,000</li> <li>•Prepare plans and implment the Ninki Nanka Trail \$500,000</li> <li>•Implement the Brufut Heights extension Plan \$6,000,000</li> </ul>	1,310,650,000	47,660,000
4	To undertake Study Tour in 'best practice' Eco and Water-based Tourism nations to learn about the challenges and best practices	<ul style="list-style-type: none"> <li>•Conduct international study to Kenya, Capeverd for eco tourism best practices - \$25,000</li> <li>•Conduct international study tours to the mediterrans regions for best practice water based tourism - \$60,000</li> <li>•Review and update the eco tourism support strategy</li> </ul>	2,530,000	92,000
5	To develop 3 investment proposals and brochures for marketing and promotional investment campaigns	<ul style="list-style-type: none"> <li>•Conduct consultative forums with relevant stakeholders - \$10,000</li> <li>•Hold 3 advocacy forum for stakeholder buy-in - \$9,000.</li> <li>•Contract services of a consultant - \$30,000</li> <li>•Development cost of promotional materials and business proposals - \$150,000</li> </ul>	5,472,500	199,000

6	To engage in a targeted international marketing campaigns to promote the cultural heritage of the country	<ul style="list-style-type: none"> <li>•Launch international media campaign and sales blitz with the CNN - \$200,000</li> <li>•Undertake farm trips to the various cultural and heritage sites by inviting seasoned journalists from Scandinavia, Germany and Nigeria to experience the destination - \$75,000</li> <li>•Undertake joint marketing with reputable tour operators(Thomas Cook, GE, COSMOS,TUI HOLLAND) - \$38,000</li> <li>•Undertake direct marketing campaigns to meet tour operators - \$30,000</li> <li>•Undertake targeted advertisement campaigns by placing adverts in reputable travel magazines - \$27,000</li> </ul>	10,175,000	370,000
7	To develop e-marketing scheme to incorporate visiting Tourists info to create marketing database accessible to the hotels	<ul style="list-style-type: none"> <li>•Make an inventory of all existing tourism assets - \$75,000</li> <li>•Setup a comprehensive web portal to incorporate all the relevant data from the inventory- \$17,000</li> <li>•Develop an e-marketing scheme \$27,000</li> </ul>	4,317,500	157,000
8	To encourage Hotel Operators to market and advertise their hotels with international Marketing Travel Agencies and Tour Operators	<ul style="list-style-type: none"> <li>•The Gambia Hotel Association to develop an interactive hotel website \$17,000</li> <li>•The Gambia Hotel Association to produce comprehensive and updated hotel brochure and magazines - \$38,000</li> <li>•Hotel operators to attend five major international trade Fairs (ITB,WTM,AKWAABA,FITUR, VAKANTIBURERS) to promote their individual hotels - \$35,000</li> </ul>	2,475,000	90,000
9	To identify existing cottage industries to be supported as pilot projects for the strategic objectives with support of Tourism Industry	<ul style="list-style-type: none"> <li>•Study tour to Ghana to learn more the implementation of the Tracking System - \$20,000</li> <li>•Development of a project proposal for the installation of a GPS tracking system in the Gambia for transit and re-export goods - \$30,000</li> <li>•Seeking funding from the development partners for the implementation of the projects to install a GPS tracking system - \$0</li> </ul>	1,375,000	50,000
10	To develop contractual binding scheme that is agreeable to all parties concerned with provisions for escape clauses	<ul style="list-style-type: none"> <li>•Secure and upgrade the GIG farm - \$75,000</li> <li>•Develop other programmes similar to GIG in NBR, CRR and URR - \$1,000,000</li> </ul>	29,562,500	1,075,000
<b>Total Cost</b>			<b>GMD 1,374,340,000</b>	<b>USD 49,976,000</b>



MANUFACTURING VALUE CHAIN STRATEGY ACTIVITIES COSTINGS				
No.	STRATEGY	ACTIVITIES	US\$/GMD 27.5	
			COST - GMD	US\$ Equivalent
1	To undertake Study Tour to WATH offices in Ghana & Senegal to learn from best practices and create business to business links	<ul style="list-style-type: none"> <li>• Procurement of 5 air tickets for 5 AGM members \$5000; \$2000 for Senegal</li> <li>• Per diem of \$200 per member per day for 4 days \$4000; \$1800 for Senegal</li> <li>• Transport Logistics for 4 days at \$100 for each of the 4 days \$2000; \$1500 for Senegal</li> </ul>	448,250.00	16,300.00
2	To engage Businesses with potential to export on their Technical Assistance needs	<ul style="list-style-type: none"> <li>• Hold meeting amongst AGM members to determine TOR criteria \$0</li> <li>• Develop TOR for Technical Needs Assessment of the sector with assistance from Best Practice Centers \$1,000</li> <li>• Engage Consultant to undertake and evaluate the needs assessment of the sector \$10,000</li> <li>• Engage Bilateral &amp; Multilateral institutions for the provision/funding of the TA identified TA needs \$10,000</li> <li>• Implementation of Consultant recommendations \$0</li> <li>• Monitoring &amp; Evaluation of the recommendations \$10,000</li> </ul>	852,500.00	31,000.00
3	To attract investment in Manufacturing through PPP with focus on Skills development - primarily engineering (Mechanical, electrical, Electromagnetic)	<ul style="list-style-type: none"> <li>• Hold 3 day forum to determine technical needs of the sector \$5000</li> <li>• Engage Consultant to develop Technical Curriculum with support of GTTI &amp; NTA \$20,000</li> <li>• AGM Executive to visit best practice centers with Consultant to learn and adopt best practice in terms of capacity development for the sector \$15,000</li> <li>• Implement program to attract students into the identified technical specializations with part funding by NTA from education levy \$20,000</li> <li>• Institute scholarship programmes \$100,000</li> <li>• Monitoring &amp; Evaluation \$10,000</li> </ul>	4,675,000.00	170,000.00
4	To identify Gaps in standards and conformity assessment services with TA from multilateral institutions	<ul style="list-style-type: none"> <li>• AGM meeting to agree on international standards requirements \$5000</li> <li>• Develop TOR for Consultant to undertake the needs assessment to highlight gaps in standards \$1,000</li> <li>• Conduct the needs assessment study \$15,000</li> <li>• Engage multilateral institutions for support based on the outcome of the Consultant's work \$10,000</li> <li>• Develop National Standards in conformity to those of international standards \$100,000</li> <li>• Implementation of the standards \$50,000</li> <li>• Monitoring and Evaluation \$10,000</li> </ul>	5,252,500.00	191,000.00
5	To enter into partnership initiatives with WA-EU Pact experts and AGOA/NEPAD experts for assistance to ensure implementation of international standards	<ul style="list-style-type: none"> <li>• MOTIE to undertake engagement \$0</li> <li>• Institute institutional arrangements where TA is lent to the sector from the engagements above \$100,000</li> <li>• Institute periodic, once yearly, seminar on standards impacting on the economic activities of the sector \$50,000 for the 5 years of the NES</li> </ul>	4,125,000.00	150,000.00
<b>Total Cost</b>			<b>GMD 15,353,250</b>	<b>USD 558,300</b>

<b>RE-EXPORTS VALUE CHAIN STRATEGY ACTIVITIES COSTINGS</b>				
<b>No.</b>	<b>STRATEGY</b>	<b>ACTIVITIES</b>	US\$/GMD 27.5	
			<b>COST - GMD</b>	<b>US\$ Equivalent</b>
1	To develop a Trade Database to capture Trade statistics to help with strategy development & trade intelligence	<ul style="list-style-type: none"> <li>•Establishment of Trade Information System</li> <li>•Develop IT Platform that would allow interface between the Trade Database and GBoS statistics platform</li> </ul>	22,000,000	800,000
2	To develop capacity in Trade Data capture and database management & administration	<ul style="list-style-type: none"> <li>•Conduct a capacity needs assessment of all the relevant stakeholders and develop a capacity building plan - \$10,000</li> <li>•Support the implementation of the capacity building plan - \$80,000</li> </ul>	2,475,000	90,000
3	To develop investment Proposals to attract investments in the Transit and Re-export trade	<ul style="list-style-type: none"> <li>•Conduct an assessment to determine the capacity gaps in the provision of re-export and transit services - \$5,000</li> <li>•Development of two investment proposals each year to attract investment for the provision of these services - \$50,000</li> <li>•Submit the project as a Tier 2 project to the EIF Board or other development partners for funding - \$0</li> </ul>	1,512,500	55,000
4	To promote investments in the Re-export and Transit trade through PPP initiatives	<ul style="list-style-type: none"> <li>•Conduct targeted sensitizations of key importers and re-exporters to develop the re-export and transit trade - \$25,000</li> <li>•Investment missions and promotions to attract at least two major importers and link them to at least two major re-exports each year - \$60,000</li> </ul>	2,337,500	85,000
5	To increase the Grace Period on cargo clearance of transit goods from 15 days to its previous 30 days	<ul style="list-style-type: none"> <li>•Review of the current policy on grace period for cargo clearance of transit goods and make it more attractive - \$1,000</li> <li>•Develop a strategy to attract more Malian transit goods - \$2,000.</li> <li>•Strengthening bilateral cooperation with Mali through a Joint Commission and with Senegal through the Senegalo-Gambia Secretariat to facilitate transit of goods - \$100,000</li> <li>•Sign an MOU with the Republic of Mali to facilitate Malian transit goods - \$50,000</li> </ul>	4,207,500	153,000
6	To develop investment proposals to attract investments for the identified Port projects	<ul style="list-style-type: none"> <li>•Equipments to improve the efficiency of the Banjul Port - \$34,500,000</li> <li>•Procurement of a tugboat</li> <li>•Procurement of a tugboat - \$5,700,000</li> <li>•Basic Yard extension project 1 - \$8,600,000</li> <li>•Jetty extension Project 2 - \$38,000,000</li> <li>•Channel dredging - \$11,500,000</li> <li>•Rehabilitation of north and south terminals - \$21,500,000</li> <li>•Development of two dry ports and container terminals at Kaur and Basse - \$2,000,000</li> </ul>	3,349,500,000	121,800,000

7	To conduct overseas Study Tour Mission to attract investment and Technical Assistance with the Ports Projects	<ul style="list-style-type: none"> <li>•Two missions to Singapore to learn and attract Technical Assistance - \$70,000</li> <li>•Strengthening of Cooperation with Singapore to attract Technical Assistance \$0</li> </ul>	1,925,000	70,000
8	To develop & implement Trade Facilitation Scheme for escorted passes for transit and re-export trade cargoes	<ul style="list-style-type: none"> <li>•Develop a strategy to enforce the ISRT - \$1,000</li> <li>•Sensitize the key stakeholders to support and facilitate the implementation of the ISRT - \$20,000</li> <li>•Conduct the regular quarterly meeting of the Trade Facilitation committee - \$7,000</li> </ul>	770,000	28,000
9	To reduce check points for transit & re-export trade cargo to 3 strategic countrywide check points (1 in Greater Banjul Area, 1 at Brikama and 1 before crossing to Senegalese Border)	<ul style="list-style-type: none"> <li>•Conduct an assessment of the number of check points on the main transit corridors and identify the 3 strategic check points on each corridor - \$2,000</li> <li>•Formulation of a task force and programme to sensitise security officials on the transit routes about the ISRT - \$10,000</li> </ul>	330,000	12,000
10	To develop/adopt and make mandatory use of Global Positioning System (GPS) for tracking of Trucks involved in the Transit & Re-export Trades	<ul style="list-style-type: none"> <li>•Study tour to Ghana to learn more the implementation of the Tracking System - \$20,000</li> <li>•Development of a project proposal for the installation of a GPS tracking system in the Gambia for transit and re-export goods - \$30,000</li> <li>•Seeking funding from the development partners for the implementation of the projects to install a GPS tracking system - \$0</li> </ul>	1,375,000	50,000
11	To undertake a joint Ministerial on the Strategic Objective	<ul style="list-style-type: none"> <li>•Organize preparatory meetings and develop a national position facilitate the movement of transit goods - \$2,000</li> <li>•Strengthening cooperation in the strategic objective through bilateral agreements or MOUs - \$100,000</li> </ul>	2,805,000	102,000
12	To undertake full implementation of the ISRT protocols	<ul style="list-style-type: none"> <li>•Hire a consultant to develop regulations to enforce the ISRT - \$7,000</li> <li>•Validation of the regulations - \$3,000</li> <li>•Construction of three way bridges at three strategic locations to facilitate transit trade. - \$1,500,000</li> </ul>	41,525,000	1,510,000
13	To strengthen the bilateral cooperation agreements between the Customs & Border Posts of the two countries	<ul style="list-style-type: none"> <li>•Conduct the regular biannual meetings between the Customs Administrations of the two countries - \$200,000</li> <li>•Pursue the implementation of the Customs Joint Border Posts initiative the Senegalo-Gambia Secretariat - \$0</li> </ul>	5,500,000	200,000
<b>Total Cost</b>			<b>GMD 3,436,262,500</b>	<b>USD 124,955,000</b>

TRANSPORTATION & TRADE FACILITATION VALUE CHAIN STRATEGY ACTIVITIES COSTINGS						
No.	STRATEGY	ACTIVITIES	US\$/GMD 27.5			
			COST - GMD	US\$ Equivalent		
1	To pursue Investment Leads - specifically for Ports, Warehousing & Business Park development	<ul style="list-style-type: none"> <li>Organise preparatory meetings for the investment leads - \$7,000</li> <li>Organize two investment promotion missions to Singapore and attract at least two major investment for ports/ware housing/business park - \$68,000</li> </ul>	2,062,500	75,000		
2	To pursue implementation of Single Business Window	Growth and Competitiveness Project: Business Environment reform programme	-	-		
3	To provide for Ports consideration in Investment outreach Missions	<ul style="list-style-type: none"> <li>Organise preparatory meetings for the investment leads - \$7,000</li> <li>Organise one investment outreach mission each year - \$166,250</li> </ul>	4,764,375	173,250		
4	To develop July 2nd Business Park to provide for Warehousing Facilities for Break-bulk, sorting & packaging for re-exports	Investment promotions to attract at least two developers to the Business Park	2,750,000	100,000		
5	To engage the BENELUX economies	<ul style="list-style-type: none"> <li>Organise national preparatory meetings</li> <li>Organise two high profile missions to seek funding of the GPA Ports dredging project</li> </ul>	1,402,500	51,000		
6	To build capacity in the area of dredging and berthing	<ul style="list-style-type: none"> <li>Conduct and assessment to determine capacity building needs of the Ports to conduct regular dredging and develop a capacity building plan - \$20,000</li> <li>Develop a mechanism to fund the plan - \$0</li> </ul>	550,000	20,000		
7	To ensure compliance with ECOWAS Protocol on Free movement of Persons and ETLs in efforts to facilitate sub-regional trade.	<ul style="list-style-type: none"> <li>Publication and distribution of the ECOWAS protocols on free movement of persons and goods</li> <li>Conduct two sensitization workshops each year on the ECOWAS Protocols on free movement of persons and goods</li> <li>Conduct media campaign on the relevant protocols</li> </ul>	2,007,500	73,000		
8	To promote joint border controls with Senegal in efforts to ensure better security and ease in the movement of persons & goods within the borders.	Pursue the development of the joint border posts at strategic locations through the Senegalo-Gambia Secretariat and bilateral meetings	2,750,000	100,000		
9	To attract Investments in Trucking and containerized Trucks	Conduct targeted investment promotions to attract investments in trucking and containerized trucks	275,000	10,000		
10	To institute Trade Technical Committee to promote awareness on Trade Facilitation & International Trade Procedures	<ul style="list-style-type: none"> <li>Conduct regular meetings of the trade facilitation committee</li> <li>Conduct two sensitization workshops of stakeholders each year - \$30,000</li> </ul>	825,000	30,000		
11	To provide training and capacity building on Trade Facilitation & International Trade Procedures	Develop a training and capacity building proposal on trade facilitation and international trade procedures	137,500	5,000		
12	To provide for ongoing dialogue and advocacy on Trade Facilitation between Government & Private sector	Conduct regular quarterly meetings of the trade facilitation committee	165,000	6,000		
13	To build Capacity in WTO Rules and Regulations	Request for the three WTO trainings each year to build capacity on WTO agreements	1,237,500	45,000		
14	To build Capacity in ICT, especially in solutions delivery for Trade Facilitation challenges	<ul style="list-style-type: none"> <li>Develop a training proposal on ICT will help address trade facilitation challenges - \$5,000</li> <li>Seek funding of the proposal under the EIF or other development partners</li> </ul>	137,500	5,000		

15	To harmonize & streamline cargo clearance procedures	<ul style="list-style-type: none"> <li>•Conduct a consultancy to carry out the exercise</li> <li>•Validate the report of the consultancy</li> <li>•Implement the recommendations of the study</li> </ul>	275,000	10,000
16	To automate and inter-link all trade facilitation bodies by 2016	<ul style="list-style-type: none"> <li>•Interlink Trade Systems and platforms</li> </ul>	4,125,000	150,000
17	To advocate and sensitize businesses on PPP through consultative workshops	<ul style="list-style-type: none"> <li>•Organize 3 consultative workshops to promote the development of PPP - \$9,000</li> <li>•Develop a PPP strategy from the outcome of the workshop - \$2,000</li> </ul>	302,500	11,000
18	To attract investment in Transport & Trade Facilitation through PPP	<ul style="list-style-type: none"> <li>•Develop 3 project proposals for investment in transport &amp; trade facilitation systems - \$15,000</li> <li>•Promote the proposals to attract two major investments in the trade facilitation systems - \$50,000</li> </ul>	1,787,500	65,000
19	To prepare Cabinet Paper on PPP	<ul style="list-style-type: none"> <li>•Drafting of a Cabinet Paper for the cabinet endorsement of the PPP strategy</li> </ul>	-	-
20	To enact Legislation & Regulations on PPP	<ul style="list-style-type: none"> <li>•Recruit a consultant to draft a PPP legislation and regulations</li> <li>•Validation of the draft legislation and regulations</li> </ul>	4,125,000	150,000
21	To seek TA on Standards from multilateral/Bilateral cooperation through MOFAIC&GA	<ul style="list-style-type: none"> <li>•Develop a term of reference for two TAs one to work under the Metrology Lab and the other to work with DG of the Gambia Standards Bureau</li> <li>•Identify Development Partners who may provide these TAs and submit request for the TAs.</li> </ul>	-	-
22	To identify Gaps in standards and conformity assessment services with TA from multilateral institutions	<ul style="list-style-type: none"> <li>•Conduct a capacity needs assessment for the strengthening of the quality infrastructure and TGSB</li> <li>•Develop a project proposal for the strengthening of the quality infrastructure and TGSB</li> </ul>	412,500	15,000
23	To undertake consultative engagements to identify relevant international standards	<ul style="list-style-type: none"> <li>•Identification of priority standards to promote the Gambia's export drive - \$0</li> <li>•Support to the formulation of standards in the priority areas - \$250,000</li> </ul>	6,875,000	250,000
24	Formulate a quality policy	<ul style="list-style-type: none"> <li>•Validation of the draft quality policy</li> <li>•Finalization and printing of the Gambia Quality Policy</li> </ul>	165,000	6,000
<b>Total Cost</b>			<b>GMD 37,131,875</b>	<b>USD 1,350,250</b>

TELECOMMUNICATIONS VALUE CHAIN STRATEGY ACTIVITIES COSTINGS				
No.	STRATEGY	ACTIVITIES	US\$/GMD 27.5	
			COST - GMD	US\$ Equivalent
1	To provide advocacy for infrastructural investment through PPP initiatives	<ul style="list-style-type: none"> <li>•Promote the development and expansion of local ICT industries through bilateral partnerships \$189,000</li> <li>•Facilitate the private sector participation to increase its investment in ICT training - \$60,000</li> <li>•Facilitate the strengthening of the infrastructure of the existing institutions offering ICT training through knowledge and skills transfer programmes - \$500,000</li> <li>•To build and develop capacity and technical expertise in the areas of database security and IT systems - \$165,000</li> </ul>	25,135,000	914,000
2	To create Science & Technology Cluster & fast track the implementation of the ICT Park	<ul style="list-style-type: none"> <li>•Promote the development of ICT Parks that respond to local and export oriented products and services requirements - \$0</li> <li>•Implement the TUJERENG Technology Park project (paper prepared and costed) - \$163,400,000               <ol style="list-style-type: none"> <li>1. Proposed site</li> <li>2. Ownership options</li> <li>3. Economic and Financial Analysis</li> <li>4. Business Model</li> <li>5. Implementation Plan</li> <li>6. Project Budget Estimate</li> </ol> </li> <li>•Development of the ICT Park Master Plan - \$150,000</li> <li>•Attract businesses through PPP initiatives and investment promotion to establish Call Centers, Disaster Recovery and Data Processing Centers - \$5,000,000</li> <li>•Undertake marketing campaigns to promote the safety, reputation and political stability of the country with the requisite infrastructure to be a Call Center, Data Processing, and Disaster Recovery Center - \$0</li> </ul>	4,635,125,000	168,550,000
3	To provide advocacy for infrastructural investment through PPP initiatives	<ul style="list-style-type: none"> <li>•To embark on national consultation tour to determine gaps and needs - \$0</li> <li>•Formulate Universal Service Policy - \$85,000.</li> <li>•Establish Universal Access Fund to be supported by funds from operators - \$0</li> <li>•Constitute Universal Access Fund Board and secretariat - \$33,680</li> <li>•Provide concessions and incentives to public-private-partnerships - \$0</li> </ul>	3,263,700	118,680
		<b>Total Cost</b>	<b>GMD 4,663,523,700</b>	<b>USD 169,582,680</b>

FINANCIAL SERVICES VALUE CHAIN STRATEGY ACTIVITIES COSTINGS				
No.	STRATEGY	ACTIVITIES	US\$/GMD 27.5	
			COST - GMD	US\$ Equivalent
1	To engage the Bankers Association to dialogue on the Strategic Objective	<ul style="list-style-type: none"> <li>• Hold 3 sector wide forum with the objective of increased lending to the Real Sector and the way to achieve it - \$5,000 per forum</li> <li>• Hold a forum on Preparation of Project Documents for lending and Contract services of a Consultant for the activity - \$15,000</li> <li>• Hold 1 forum per 5 Productive Real Sectors on the requirements of financing from Banks \$10,000 per forum. Have an annual forum after the initial Productive Real Sectors forum</li> <li>• Commercial Banks to undertake in-house capacity development on Project Proposal Appraisal \$0</li> <li>• Commercial Banks through their Association of Human Resource Development to institutionalize the Project Proposal Appraisal training into an annual training programme - \$0</li> </ul>	3,300,000	120,000
2	To create awareness on the benefits of account record keeping	<ul style="list-style-type: none"> <li>• Hold 4 quarterly awareness forums in yr 1 and 2 thereafter on Bookkeeping &amp; accounting needs - \$5,000 per forum</li> <li>• Hold 3 Forums with the objective of Promoting entrepreneurship among Gambian ACCA holders to set-up accounting and Auditing Firms \$10,000 per forum</li> </ul>	1,375,000	50,000
3	To use moral suasion to have firms and businesses to keep annual audited accounts	<ul style="list-style-type: none"> <li>• To hold 3 workshops with accounting and audit firms to impress need for improved pricing on Auditing Fees in efforts to ensure affordability - \$5,000 per forum</li> </ul>	412,500	15,000
4	To review the Mortgage Act 2003	<ul style="list-style-type: none"> <li>• To hold 2 follow-up workshops to revisit and take onboard the concerns of the GBA \$2,500/workshop</li> <li>• Printing of the revised Mortgage Act for circulation \$10,000</li> </ul>	412,500	15,000
5	To broaden the financial instruments offered by the CBG to include Medium Term and Long Term Financing Instruments	<ul style="list-style-type: none"> <li>• Develop supporting Regulation through use of consultancy services to the Banking Act to provide for the implementation of such MT &amp; LT Banking Instruments - \$50,000</li> <li>• Build the in-house CBG capacity to administer such MT &amp; LT Financial Instruments over a 2 year period - \$150,000</li> <li>• Hold 2 forums per year for 2 years for awareness creation and administrative requirements for implementation of such MT &amp; LT Financial Instruments - \$10,000 per forum</li> <li>• Upgrade of CBG Supervisory requirements and platforms to accommodate the MT &amp; LT Financial Instruments - \$200,000</li> <li>• To encourage financial engineering and innovation in the Financial Sector from the existing 'Bank Clusters' to develop new financial instruments - \$0</li> </ul>	11,275,000	410,000

6	To extend provisional regulation on banks for compliance with the mandatory credit reporting on NPL of debtors to the Mass Market	<ul style="list-style-type: none"> <li>• Hold 3 consultative forum for the Credit Reference Bureau to be privately administered - \$5,000/forum</li> <li>• Hold 10 public awareness and sensitization campaign on the modalities of the Credit Reference Bureau - 4 forums at \$5,000 per forum; 2 Radio at USD300 per forum; and 4 TV at \$1500/TV forum</li> <li>• Develop TOR for the implementation of the privatization of the CRB - \$10,000</li> </ul>	1,419,000	51,600
7	To encourage investment and participation of first class international banks	<ul style="list-style-type: none"> <li>• Undertake Business Environment improvement dialogues and Consultations like the annual Economic Summit - \$10,000</li> <li>• Undertake targeted investment Missions or as part of Presidential Missions. If selective - \$15,000 annually for 4 years</li> </ul>	1,925,000	70,000
8	To Facilitate and revive the dialogue on the establishment and creation of a Stock Market & its regulatory body	<ul style="list-style-type: none"> <li>• Undertake review of the Canadian Study that was done for the creation of a Stock Market- \$0</li> <li>• Hold 1-3 day forums following the review of the Study to chart the way forward with the objective of implementation of the recommendations of the Study- \$5,000 per forum</li> <li>• Develop TOR, if necessary, to upgrade the Canadian Study - \$10,000</li> <li>• Develop supporting Regulation, through use of consultancy services, to the Banking Act to provide for the implementation of the Stock Market - \$50,000</li> </ul>	2,062,500	75,000
9	To undertake a study Tour to Sub-regional Countries (Ghana or Nigeria) with well established Stock Market to learn Best Practices and to arrange for Technical Assistance	<ul style="list-style-type: none"> <li>• 3 day Study Tour for 10 team delegation from CBG, GBA, GIEPA, MoFEA - \$20,000</li> <li>• Arrange for a 30-day attachment for a 5-member team from CBG, MoFEA, and GBA with option for Private sector participants at own expense - \$35,000</li> </ul>	1,512,500	55,000
10	To seek Donor support in the establishment of a Stock Market & a Regulatory Body	<ul style="list-style-type: none"> <li>• Engage possible donor partners for support to establish a Stock Market - \$0</li> <li>• Develop the physical structure of the Stock Market - \$200,000</li> <li>• Development of the TOR for the administrative personnel of the Stock Market - \$75,000</li> <li>• Procurement and setting up of the logistical IT framework and infrastructure to underpin the operations of the Stock Market- \$500,000</li> </ul>	21,312,500	775,000
11	To develop and build capacity in administration of a stock market and regulatory body	<ul style="list-style-type: none"> <li>• Hold an annual training and capacity building program on all Stock Market Administrative and technical capacity needs through Donor support- \$200,000</li> </ul>	5,500,000	200,000
12	To promote dialogue on the objective of Broadening the Tax Base	<ul style="list-style-type: none"> <li>• Organize 4 quarterly stakeholder wide forum on the objective of broadening the tax base - \$5,000</li> </ul>	550,000	20,000



13	To undertake study tour with the objective of developing a strategy to streamline and reduce the tax rate (Mauritius as target country)	<ul style="list-style-type: none"> <li>• 3-day Study Tour for 10 drawn from MoFEA, GRA, GIEPA, GCCI, MOTIE - \$20,000</li> <li>• Hold 3 sensitization forums on the topic - \$5,000 per forum</li> <li>• Engage IMF support on the topic - \$0</li> <li>• To undertake study to ascertain the net cost-benefit of broadening the tax base - \$50,000</li> </ul>	2,337,500	85,000
14	To undertake for Municipality Councils to have petty traders and Micro, Small & Medium Enterprises to formally register their businesses	<ul style="list-style-type: none"> <li>• Enforce and implement mandatory use of Tax Identification Number &amp; National ID on all financial related transactions - \$100,000</li> <li>• Undertake to implement uniform and standardize registration process for MSME - \$100,000</li> <li>• Mandate for compulsory use of TIN and Biometric Cards to effect all financial transactions with the Municipalities - \$100,000</li> </ul>	8,250,000	300,000
<b>Total Cost</b>			<b>GMD 61,644,000</b>	<b>USD 2,241,600</b>

HUMAN RESOURCES DEVELOPMENT VALUE CHAIN STRATEGY ACTIVITIES COSTINGS				
No.	STRATEGY	ACTIVITIES	US\$/GMD \$27.50	
			COST - GMD	US\$ Equivalent
1	To institute robust and sustainable training programs in the hospitality, manufacturing, agricultural sectors and science & technology	<ul style="list-style-type: none"> <li>• Conduct an assessment to determine the capacity gaps</li> <li>• Develop a strategy to address the gaps identified</li> <li>• Develop the curriculum</li> </ul>	4,125,000	150,000
2	To strengthen the capacity of training institutions	<ul style="list-style-type: none"> <li>• Develop a HR plan for tertiary institutions</li> <li>• Train a number of personnel to Masters &amp; PhD level</li> <li>• Procurement of equipment teaching aids, etc)</li> </ul>	55,000,000	2,000,000
3	To develop National Training Programs to meet the capacity needs of businesses & Government	<ul style="list-style-type: none"> <li>• Establish a steering Committee to review the curriculum</li> <li>• Develop a new curriculum</li> <li>• hold a workshop to sensitize stakeholders</li> <li>• Monitor the implementation</li> </ul>	1,375,000	50,000
4	To review and upgrade the curriculum programs of the technical training institutes to reflect the needs of businesses, especially the dearth in technical skills	<ul style="list-style-type: none"> <li>• Recruit a consultant to review the curriculum</li> <li>• Hold one week Consultative meeting for Stakeholders to review work of Consultant</li> <li>• Establish a Committee to develop a new Curriculum</li> </ul>	2,750,000	100,000
5	To attract and train more qualified teachers to improve student/teacher ratio	<ul style="list-style-type: none"> <li>• Develop a Project to support the budget of MOBSE &amp; MOHERST for 5 years</li> </ul>	55,000,000	2,000,000
6	To institute a tax incentive or rebate scheme as encouragement for private sector investment in HRD	<ul style="list-style-type: none"> <li>• Conduct a feasibility study</li> <li>• Develop a concept Paper</li> <li>• Develop a Policy &amp; Strategy</li> <li>• Develop the Legal Framework &amp; Scheme</li> </ul>	6,600,000	240,000
7	To institute a robust accreditation program to ensure sustainability in the number of qualified teachers	<ul style="list-style-type: none"> <li>• Develop a Project &amp; seek funding to support the budget of MOBSE &amp; MOHERST for 5 years-0</li> </ul>	27,500,000	1,000,000
8	To create Private accreditation Bodies	<ul style="list-style-type: none"> <li>• Establish task force</li> <li>• Develop a policy &amp; Legal framework</li> </ul>	1,375,000	50,000
9	To institute a sustainable monitoring evaluation program on all	<ul style="list-style-type: none"> <li>• Seek Funding to support the Budget MOHERST for five years</li> <li>• Institutionalise the Higher &amp; Tertiary Education Observatory</li> </ul>	2,750,000	100,000
10	To provide incentive schemes to attract qualified people into the teaching profession	<ul style="list-style-type: none"> <li>• Conduct a study</li> <li>• Develop a Human Resource development Plan</li> </ul>	4,125,000	150,000
11	To develop appropriate incentive schemes such as improved working condition, training, and capacity development	<ul style="list-style-type: none"> <li>• Create a task Force Conduct a study tour to identify the most suitable scheme</li> <li>• Develop the policy to improve working conditions, training and capacity development</li> </ul>	9,625,000	350,000
<b>TOTAL COST</b>			<b>GMD 170,225,000</b>	<b>\$6,190,000</b>

RESEARCH & DEVELOPMENT VALUE CHAIN STRATEGY ACTIVITIES COSTINGS				
No.	STRATEGY	ACTIVITIES	US\$/GMD 27.5	
			COST - GMD	US\$ Equivalent
1	To undertake a situational analysis of the current state of R&D facilities by a consultant & to assess new areas of need for R&D	<ul style="list-style-type: none"> <li>Recruit a consultant to assess need of the Country and prioritiz</li> <li>Develop Policy</li> <li>Recruit a consultant to draft a Legal Frame work</li> <li>Validation of the draft legislation and regulations</li> </ul>	2,750,000	100,000
2	To establish an Institution/Agency through an Act of Parliament to administer National R&D initiatives	<ul style="list-style-type: none"> <li>Hold one day Consultative meeting</li> <li>Develop the Legislation</li> <li>Hold 3 days workshop to validate the Law</li> <li>Create a national Council for Research</li> </ul>	5,500,000	200,000
3	To provide sufficient budgetary support to finance R&D	<ul style="list-style-type: none"> <li>Draft of a Cabinet Paper for the cabinet to endorse that 1% of the National Budget be spent on R&amp;D</li> <li>Develop 2 project proposal for investment &amp; collaboration with Development Partners in R&amp;D \$15,000</li> <li>Promote the proposals to attract a major investment &amp; funding from Development Partners</li> </ul>	137,500	5,000
4	To undertake review of the school curriculum in line with the strategic objective	<ul style="list-style-type: none"> <li>Establish a review Committee to review the curriculum and make recommendation</li> <li>Organize 3 days consultative workshops to validate the recommendations of the committee</li> <li>input and implement the recommendation</li> </ul>	1,375,000	50,000
5	To establish a R&D cluster centre	<ul style="list-style-type: none"> <li>Develop a national innovation Park</li> <li>Organize two investment promotion missions to abroad and attract at least three major investments</li> </ul>	71,500,000	2,600,000
6	To embed annual Science & Technology inter-school competition and UTG level	<ul style="list-style-type: none"> <li>Develop a mechanisms for the competition</li> <li>Sensitize the Competitors</li> <li>Launch the Competition Annually</li> </ul>	550,000	20,000
7	To embed Science & Technology Scholarship Programmes at High Schools and the University	<ul style="list-style-type: none"> <li>Draft a Cabinet Paper for the cabinet to increase budget</li> <li>Identify Development Partners who may provide Financial support</li> <li>Develop a scheme to motivate students to do Science</li> </ul>	9,625,000	350,000
8	To establish the requisite R&D institutions through the support of TA from identified multilateral and bilateral	<ul style="list-style-type: none"> <li>Develop a term of reference for two TAs one to work under the MOHERST and the other with Training Institutions</li> <li>Identify Development Partners who may provide these TAs and submit request for the TAs.</li> </ul>	1,512,500	55,000
9	To build the capacity of GBOS and NARI, amongst other existing institutions to increase data availability in key sectors of the economy	<ul style="list-style-type: none"> <li>Conduct an assessment to determine capacity building needs of GBOS, NARI, &amp; others</li> <li>To develop a capacity building plan &amp; budget</li> <li>Identify Development Partners who may provide support</li> <li>Develop a mechanism to fund the plan</li> </ul>	9,900,000	360,000
10	To increase capacity in the areas of data & statistical clerks; economists; and data analysts	<ul style="list-style-type: none"> <li>Establish data base units in Ministries &amp; Public institutions</li> <li>Identify &amp; train at least two focal persons for each unit</li> <li>Monitor &amp; supervise the timely collection &amp; entry of data through regular audits</li> </ul>	2,750,000	100,000
11	To upgrade GBOS database	<ul style="list-style-type: none"> <li>Link GBOS Data base to other units</li> <li>Determine type of data collected &amp; assess current soft ware</li> <li>Identify the best soft ware &amp; hard ware</li> <li>Request for budget support to purchase soft ware</li> </ul>	6,875,000	250,000
12	To upgrade the existing Science & Technology Policy into a National R&D Policy	<ul style="list-style-type: none"> <li>Establish a steering Committee</li> <li>Hire a Consultant to draft the Science &amp; Technology R&amp;D</li> <li>Validate the Policy</li> </ul>	6,875,000	250,000
		<b>TOTAL COST</b>	<b>GMD 119,350,000</b>	<b>\$4,340,000</b>