



**AFRICAN DEVELOPMENT
BANK GROUP**

**REVIEW OF THE PERFORMANCE OF THE CURRENT
FISHERIES PORTFOLIO OF THE AFRICAN DEVELOPMENT BANK**

BRIEF TO THE BOARD

**AGRICULTURE AND AGRO-INDUSTRY DEPARTMENT - OSAN
OCTOBER 2008**

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List of abbreviations and acronyms

ACP	Africa, Caribbean and Pacific
BCEAO	Banque Centrale des Etats de l'Afrique de l'Ouest
CBD	Convention on Biological Diversity
CFFA	Coalition for Fairer Fishing Agreements
CCRF	Code of Conduct for Responsible Fisheries
CECAF	Fishery Committee for Eastern Central Atlantic
CITES	Convention on the International Trade in Endangered Species of Wild Fauna and Flora
COREP	Regional Fisheries Committee for the Gulf of Guinea
CSRP	La Commission Sous Régionale des Pêches
CZM	Coastal Zone Management
EEZ	Exclusive Economic Zone
EIA	Environmental Impact Statement
ESMP	Environmental and Social Management Plan
FAO	Food and Agricultural Organisation of the United Nations
GEF	Global Environment Facility
ICCAT	International Commission for the Conservation of Atlantic Tunas
IGAD	Intergovernmental Authority on Development
IOC	Indian Ocean Commission
IOTC	Indian Ocean Tuna Commission
IRD	Institut de Recherche pour le Développement (France)
IUU	Illegal, Unreported and Unregulated
LFA	Logical (Project) Framework Analysis
LME	Large Marine Ecosystem
MCS	Monitoring, Control and Surveillance
NBI	Nile Basin Initiative
NEAP	National Environmental Action Plans
NEPAD	New Economic Partnership for Africa
NFDS	Nordenfjeldske Development Services
OECD	Organisation for Economic Co-operation and Development
PCR	Project Completion Report
REC	Regional Economic Community
RFMO	Regional Fisheries Management Organisation
SEA	Strategic Environmental Assessment
SIOFA	The South Indian Ocean Fisheries Agreement
SWIOFC	South West Indian Ocean Fisheries Commission
UNCLOS	United Nations Convention on the Law of the Sea
UNFCCC	United Nations Framework Convention on Climate Change

1. INTRODUCTION

1.1 In line with its agriculture and rural development sector policy approved in 2000, The Bank Group has financed numerous fisheries and aquaculture projects and programs. At the time of the review, the ongoing fisheries and aquaculture portfolio of the Bank was comprised of 21 projects and programs benefiting 23 Regional Member Countries (RMC). Over 90 percent of these were approved after the first fisheries sector portfolio review which was carried out in 2000.

1.2 This sector review recommended to the Bank that future fisheries projects should pay particular attention to the following issues: sustainable management of fisheries resources, integrated fisheries projects, the protection and management of coastal areas, increased participation of beneficiary populations, and synergy with the private sector in the promotion of aquaculture.

1.3 In 2006, the Bank underwent internal restructuring placing emphasis on development effectiveness and improved portfolio management. As a consequence of this reorientation, it became imperative to: (i) assess the current state of affairs in the fisheries sector; (ii) track the level of implementation of the recommendations of the last sector review; (iii) undertake a detailed analysis of the implementation of the current projects; and (iv) propose a plan of action for improving the performance of the current portfolio.

1.4 This report presents the results of a portfolio review that was carried out by a team of consultants provided by Nordenfjeldske Development Services (NFDS) and financed by NORAD bilateral funds. The team consisted of a team leader/economist, a fisheries specialist, a socio-economist, an environmental specialist, and a fisheries policy specialist. The study encompassed field visits to four case-study projects that were considered representative of the current portfolio (in Benin, Cameroon, Djibouti and Malawi), and desk-top analyses of the 17 other projects. A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis of all fisheries projects including project implementation, project impacts, and AfDB procedures was undertaken to feed into the forward planning aspect of the review. The study was carried out from mid-2007 to early 2008. The results of the study were first reviewed by the Bank at an internal working group on 10th April 2008 and then by a regional country team meeting on 17th April 2008. They were presented thereafter to the project coordinators and fisheries officials from 17 Regional Member Countries during a workshop organized in Tunis on 19-20th June 2008. The report was then finalized integrating the comments and recommendations from the workshop and sent to the Bank in September 2008.

1.5 The full review report comprises three volumes:

- a) Review Report Volume I – Executive Document. This document provides an overview of the main review findings and proposals with a summary. This has been used as the basis for this brief.
- b) Review Report Volume II – Main Report. This document sets out the main analysis and findings of the review as follows:
 - i. Introduction to the situation and review;
 - ii. Methods used to collect and analyse data and information;
 - iii. Assessment of the AfDB portfolio;
 - iv. Lessons learnt and
 - v. Proposed framework and way forward for future fisheries and aquaculture projects.

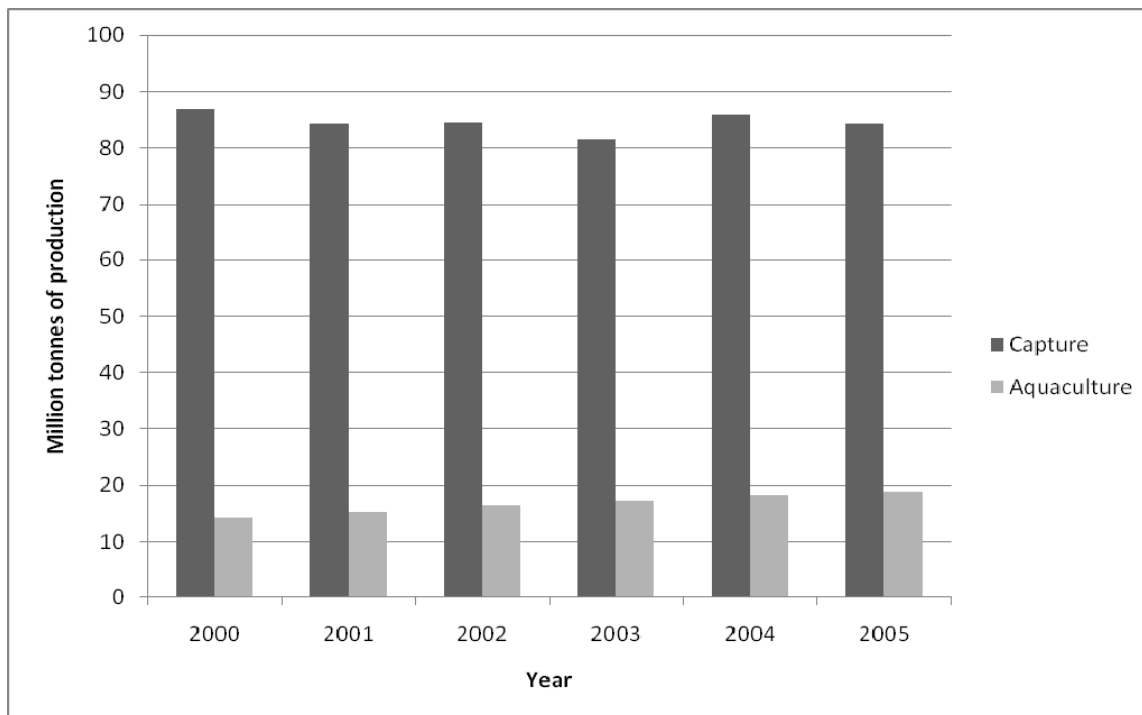
- c) Review Report Volume III – Annexes. This document sets out information from the field work and the desk studies that was compiled for the purpose of feeding into the review analysis:
- i. Inception Report;
 - ii. Work programme;
 - iii. A review of the case-study projects of Benin, Cameroon, Djibouti and Malawi;
 - iv. Project desk reviews for 17 projects;
 - v. Project logical frameworks; and
 - vi. References.

2. BACKGROUND TO FISHERIES AND AQUACULTURE

2.1 Global fisheries and aquaculture

Capture fisheries and aquaculture supplied the world with about 107 million tonnes of food fish in 2005, equivalent to an apparent per capita supply of 16.6 kg (Figures 1 and 2).¹ Of this total, aquaculture accounted for 43%.² Nearly 10 million people in Africa or 1.5% of the continent's population depend directly on fishing, fish farming, fish processing and fish trading for their livelihoods.

Figure 1: World marine fisheries and aquaculture production

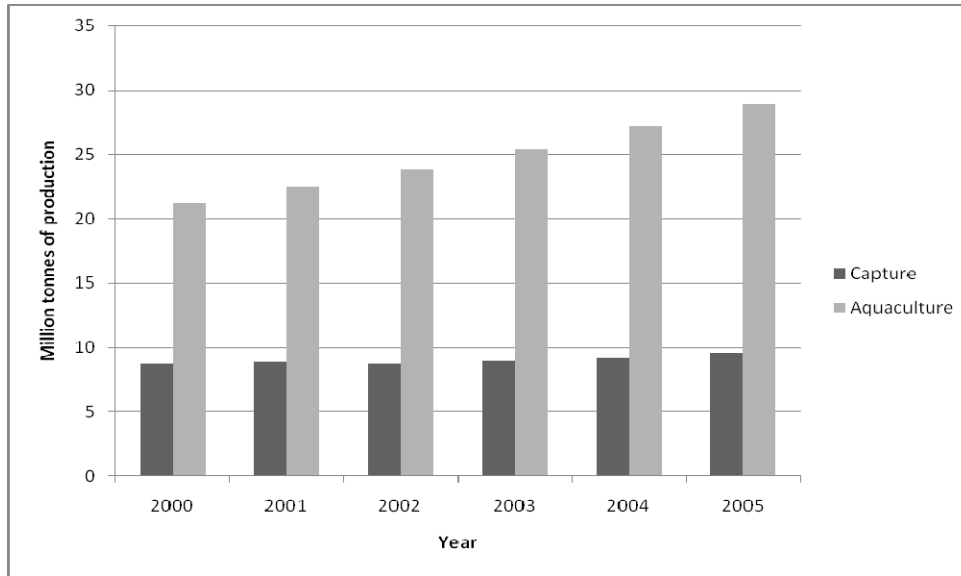


Source: FAO – *The state of the World's fisheries and aquaculture 2006*, FAO Rome, 2007

¹ Non-food fish contributed an additional 34.4 million tonnes

² FAO 2007: The state of the worlds fisheries and aquaculture 2006: Fisheries and Aquaculture Department, 2007

Figure 2: World inland fisheries and aquaculture production



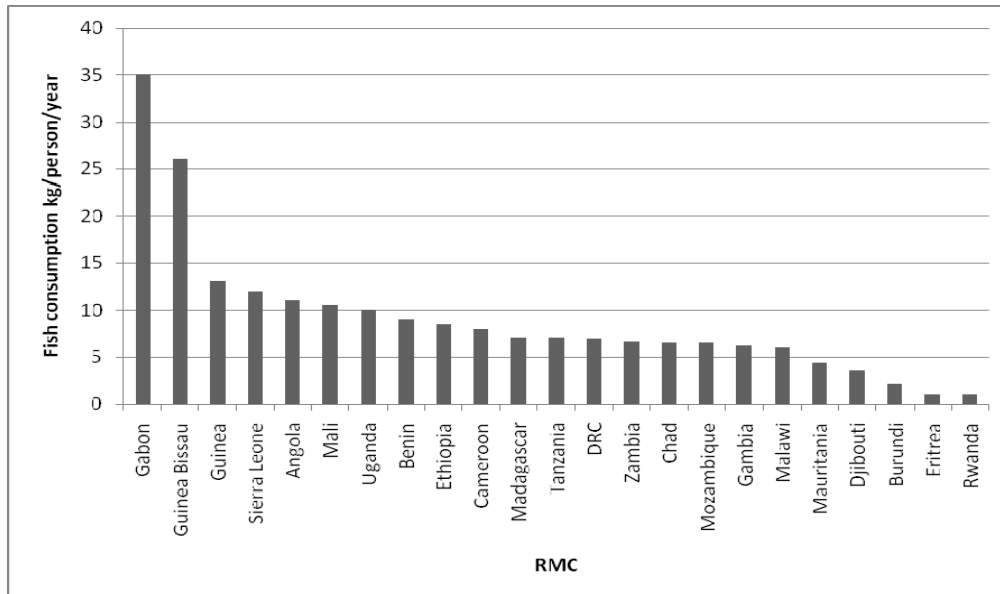
Source: FAO – *The state of the World's fisheries and aquaculture 2006*, FAO Rome, 2007

2.2 African fisheries and aquaculture

Marine and inland fisheries in Africa are very important in terms of:

- Food security and nutrition where fish provides a significant contribution to animal protein consumption (Figure 3);
- Direct and indirect employment generation (Figure 4); and
- The income contribution to government budgets and to the gross domestic product (GDP, Figure 5) from fisheries and associated activities such as fish processing, fishing agreements, license fees, and from the activities of distant water fishing fleets which are serviced at regional ports.

Figure 3: Fish consumption in RMC of the AfDB fishery portfolio



Source: FAO – *The state of the World's fisheries and aquaculture 2006*: FAO, Rome, 2007

Figure 4: The direct and indirect employment created by the fishery sector in RMC of the AfDB fisheries portfolio

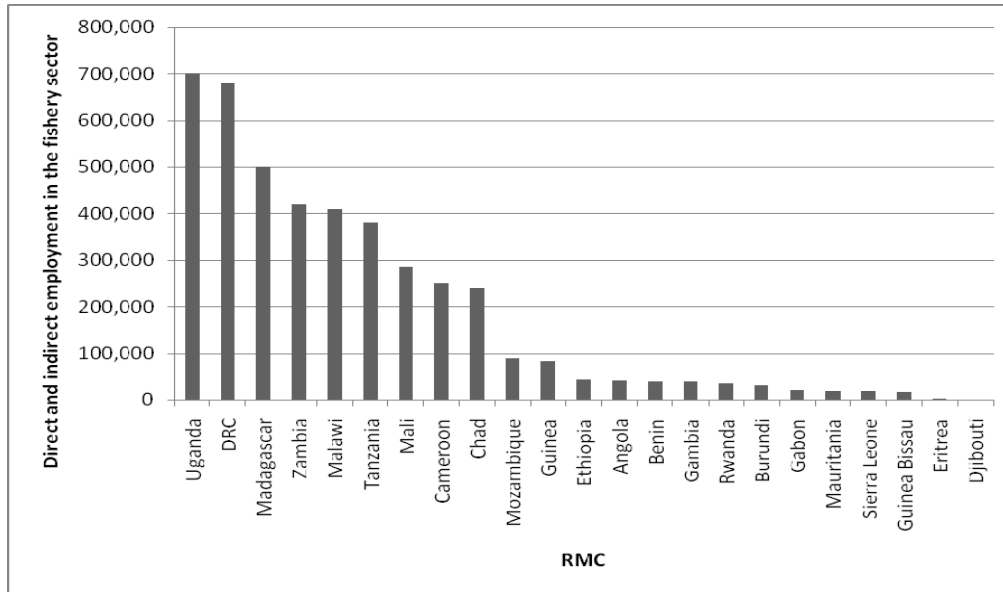
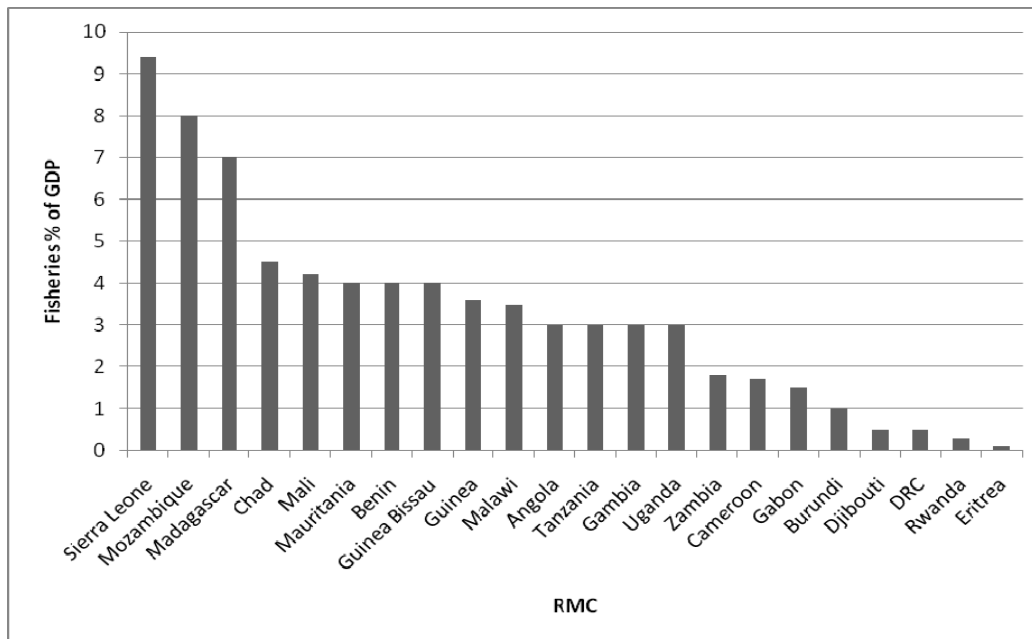


Figure 5: The percentage of GDP formed by fisheries in the RMC of the AfDB fisheries portfolio



Note: There was no data available for Ethiopia

Note: The figures aim to represent the latest published figures available from UN and AfDB sources

2.3 Challenges to African fisheries and aquaculture

2.3.1 In 2005, the pan-African Fish for All initiative and African heads of state and government jointly made a strong declaration on the future of sustainable fisheries and aquaculture in Africa.³ The declaration was a response to the grave concerns over the state of African fisheries. These

³ See <http://www.fishforall.org/ffa-summit/outcomes.asp> for the Abuja Declaration on sustainable fisheries and aquaculture in Africa, adopted by the Heads of State Meeting of the NEPAD “Fish For All Summit” Abuja, Nigeria, 25 August 2005.

concerns include the depletion of fisheries resources by excessive fishing effort; the degradation of aquatic environments; the potential impact of climate change on marine and freshwater ecosystems; population growth and the increasing demand for fish as a source of animal protein; and the threat of illegal, unregulated and unreported fishing mainly by foreign distant water fishing fleets.

2.3.2 With 10 million people dependent on fisheries and aquaculture for their livelihoods, fisheries forms a vital element in the social fabric of African communities and an important link in the fight against poverty. Fish is also a highly traded commodity and it is one of the leading export commodities for Africa, with an annual export value of nearly USD 3 billion. Yet, these benefits are at risk as the exploitation of natural fish stocks is reaching its maximum and aquaculture production has fallen short of achieving its potential.

2.3.3 The African Development Bank, through its programme of fisheries and aquaculture projects, has enormous potential to contribute to improving this situation. This review of the AfDB's fisheries portfolio provides an opportunity to reassess AfDB's role and to make recommendations for adjustments and realignments that will improve the performance of the projects and ensure that they are contributing to overcoming the challenges that Africa is facing in realising the full potential for fisheries and aquaculture.

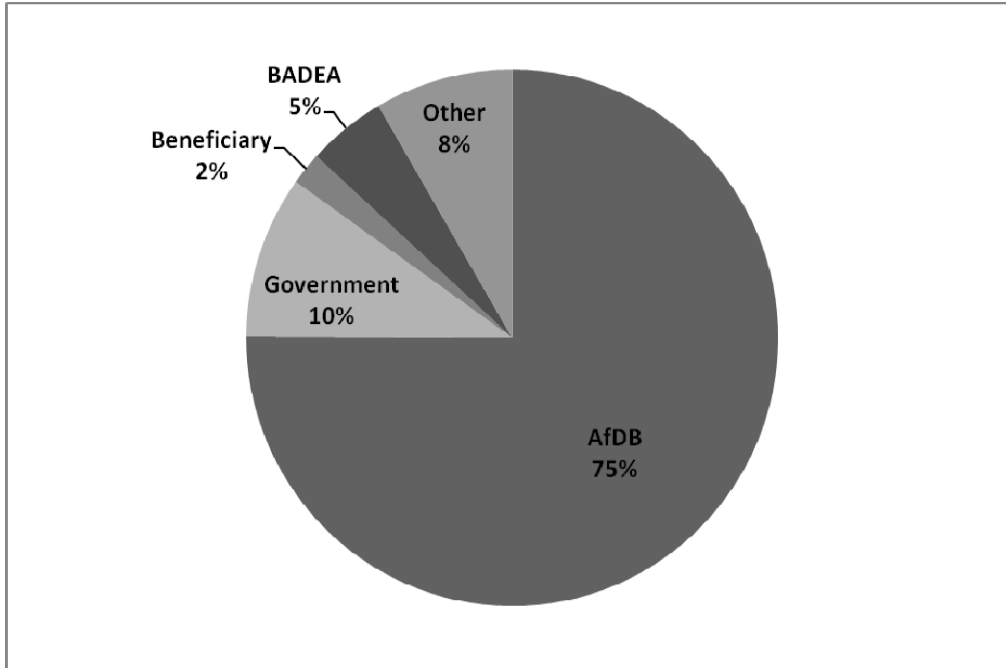
3. THE REVIEW

The review was undertaken in light of concerns by OSAN over the performance of the portfolio. The review's purpose was to check that the overall direction of the portfolio is still appropriate and to ask whether the project activities are likely to meet the purposes for which they were planned. It identifies the strengths and weaknesses of the projects and the AfDB project cycle and management procedures. It also reviews other issues relating to the relevance and appropriateness of the portfolio. Finally, it makes recommendations for the future focus and management of the portfolio.

3.1 The AfDB fisheries and aquaculture portfolio

3.1.1 At the time of the review, the Bank fisheries and aquaculture portfolio comprised 21 projects that benefited 23 RMC's. All the projects have been reviewed as desk studies and four countries (Benin, Cameroon, Djibouti and Malawi) were visited for more in-depth field trips. The fisheries and aquaculture portfolio of the AfDB is the largest single source of financing to the fisheries sector in Africa, totalling nearly 246 million UA, which is equivalent to 383 million USD. The portfolio benefits from a variety of funding sources including AfDB, governments, beneficiaries and other multilateral donors. The majority of the funds come from the AfDB, with a value of 185 million UA or seventy five percent of the portfolio's value (Figure 6).

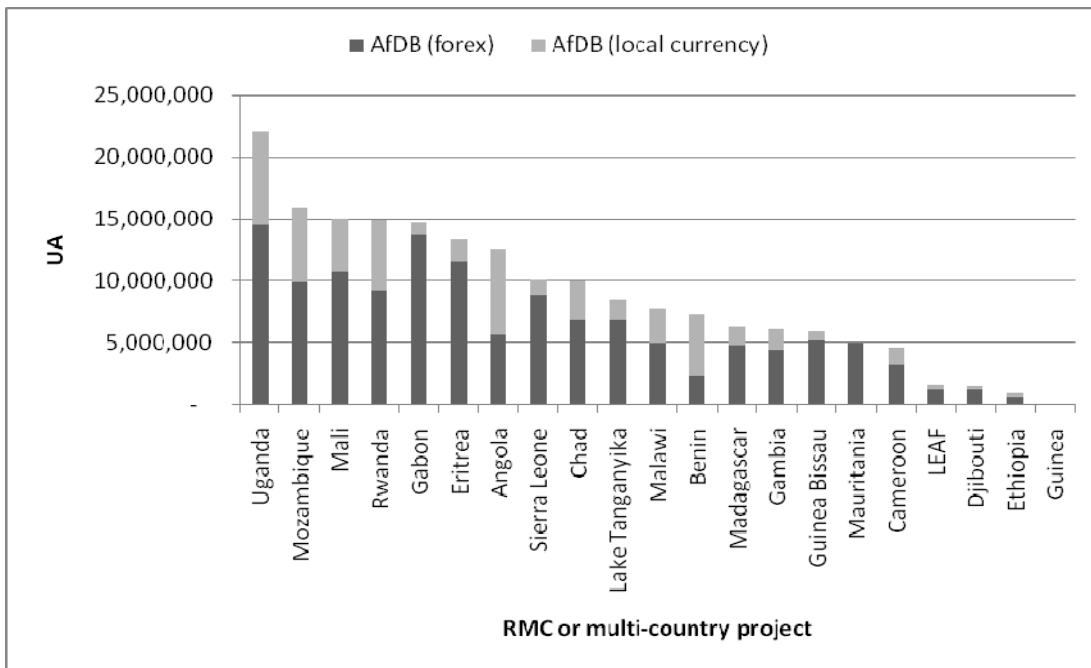
Figure 6: Sources of funding (loans and grants) for the AfDB fisheries and aquaculture portfolio



Source: AfDB

3.1.2 The funding to the RMC’s is given either as a grant or a loan and is divided into foreign exchange and local currency, with the proportion of each varying by country (Figure 7).

Figure 7: Project contributions from the AfDB by RMC or multi-project

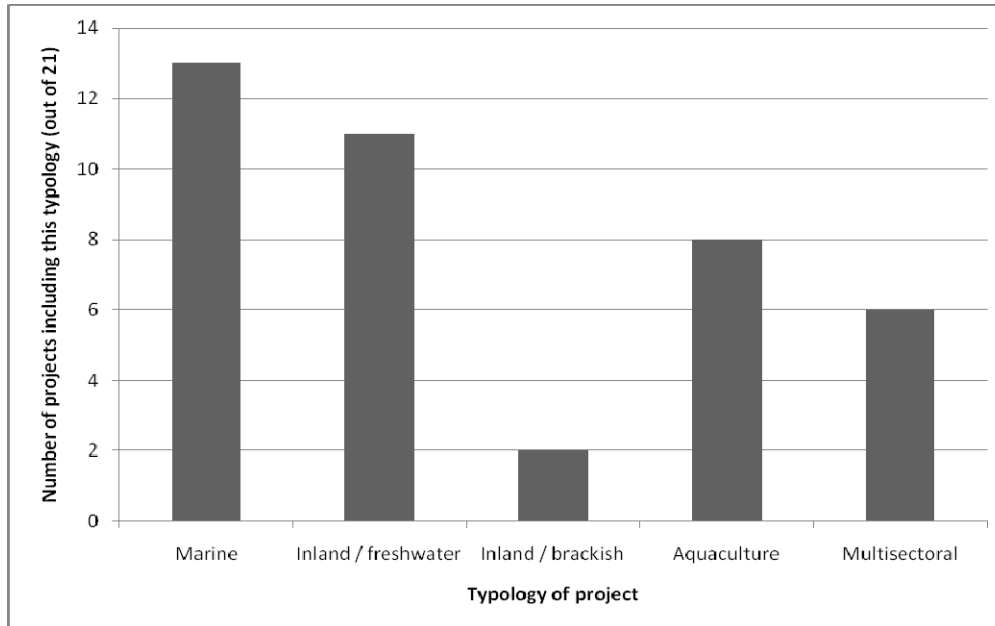


Source: AfDB

3.1.3 The AfDB fisheries and aquaculture projects cover a range of characteristics and typologies. Thirteen of the projects cover marine fisheries while thirteen cover inland in either

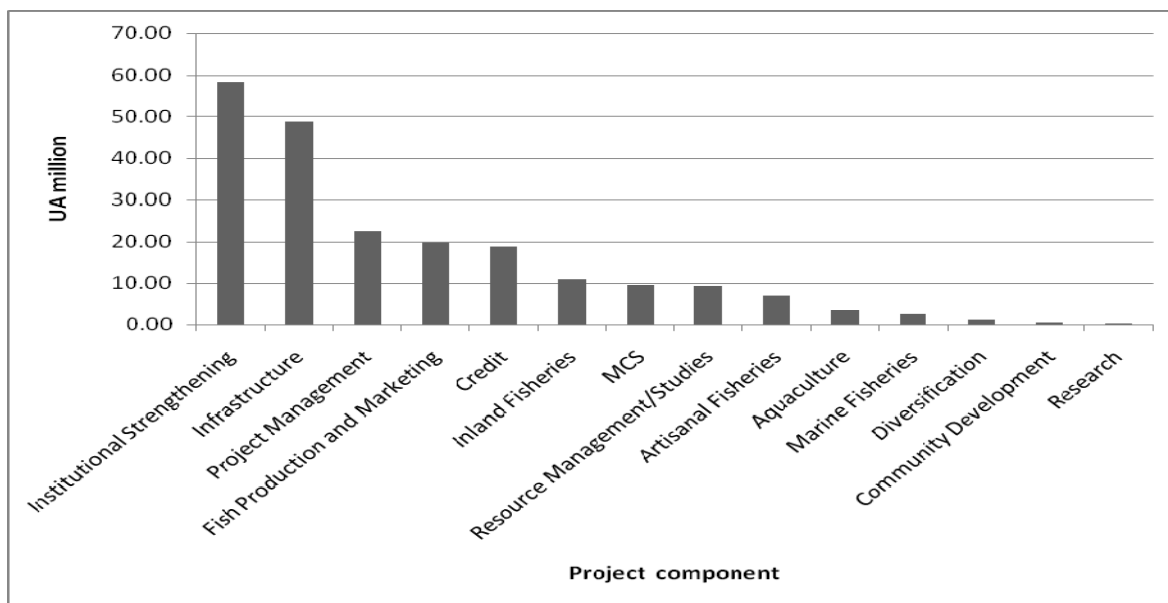
freshwater or brackish water (five projects cover both inland and marine fisheries). Aquaculture and multi-sectoral projects are less common with eight and six respectively (Figure 8).⁴

Figure 8: The occurrence of typologies within the fisheries and aquaculture portfolio



3.1.4 Each project within the portfolio has specific components and focus. In terms of the rate of occurrence, the most frequent components are capacity building and project management. In terms of allocation of funding, the most important components are institutional strengthening and infrastructure, followed by project management, fish production and marketing, credit and inland fisheries development (Figure 9).

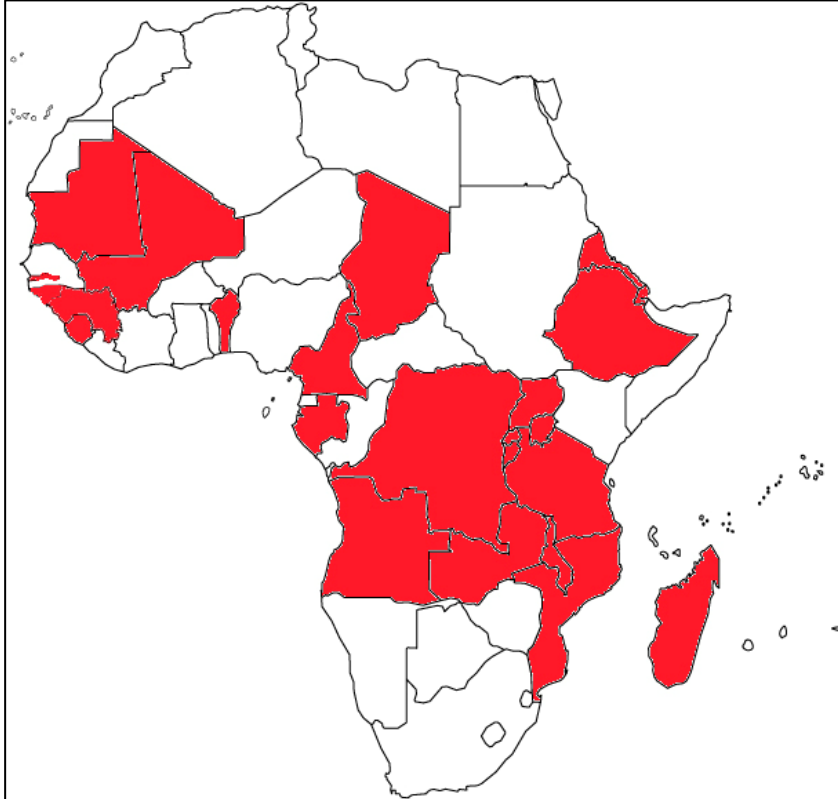
Figure 9: AfDB Fisheries portfolio by component value (excluding contingencies)



⁴ More details on the projects are given in the desk summaries in Volume III, Sections 3 and 4.

The 21 fisheries and aquaculture projects of the AfDB portfolio cover 23 RMC's (Figure 10).

Figure 10: Geographical distribution of the 21 AfDB fishery and aquaculture projects



3.2 Key review findings and recommendations

3.2.1 Success of the AfDB fisheries and aquaculture portfolio and projects

At this stage in the portfolio lifecycle and level of implementation of individual projects, the projects are having limited verifiable success with regard to their set objectives. In half of the projects it was not possible to assess if the objectives, as defined in the project logical frameworks, have been achieved (either information was not available or it is too early in the project to assess this). In four cases the achievements were minimal, in four there were some achievements, and in three the achievements were acceptable. The achievement of project objectives depends on a number of factors and these are explored in the following sections while an overview is provided in the Strengths, Weaknesses, Opportunity and Threats analysis.

Table 1: SWOT Analysis of AfDB's Fisheries Portfolio

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Emphasis on poverty reduction. • Emphasis on food security. • Innovation – the development of alternative livelihoods (e.g. Benin). • Largest source of finance to the fisheries sector in Africa. • Broad experience in the fisheries sector. • Increased number of country offices being opened. • Newly adopted integrated approach to fisheries development which includes other sectors – agriculture and the environment. 	<ul style="list-style-type: none"> • Variation in the consistency of logical frameworks (detailed components). • Lack of metrics in LFAs to measure the ex post financial and economic impacts of projects. • Lack of continuity of task managers on fisheries projects. • Staff not available for training courses because of travel/field commitments. • Lack of adequate staffing to deal with the fisheries portfolio. • Lack of fisheries specialists on some of the project evaluation, supervision and mid term review missions. • Lack of or late delivery of base line surveys (fish resources, socio – economic profiles). • Environmental issues not always adequately dealt with in project design. • Gender and health issues not adequately dealt with in project design, including access rights and land tenure issues for women. • Over ambitious targets with respect to the number of beneficiaries and economic returns from projects. • Sanctions applied to a fisheries project may affect all other projects in an RMC. • There are often too many objectives in the project log frames.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Scope for closer coordination with the World Bank, other multilateral banks and bilateral donors in several areas e.g. sector policy and planning, resource assessment, infrastructure and small components of MCS (with other donors). • Support to fisheries resource assessment programmes and other new areas of fisheries development. • Contribution to better governance and co- management of fisheries. • Contribution to new economically sustainable aquaculture initiatives to ensure food security. • Development of sector policy framework to guide development of a sector programming approach across the continent. • Adoption of lessons learnt from review process and future PCR. 	<ul style="list-style-type: none"> • The state of some fish stocks around the continent and poor management of these stocks. • Other banks and sources of finance offer better financial terms and easier procurement procedures. • Limited take up of credit because of conditions (guarantees, interest rates etc). • Lack of financial resources to ensure the continuation of the project. • Other external threats to fisheries – climate change, desertification for both marine and inland fisheries. • Better salaries and incentives paid by other fisheries institutions and projects as well as the private sector. • Lack of commitment to economically sustainable fisheries development by RMC governments. • Lack of commitment by project staff. • Political and social instability may jeopardise the project.

3.2.2 Relevance of the portfolio

3.2.2.1 More than one third (34%) of the sub-Saharan African population is undernourished, which represents an increase of 9 million since the 1996 World Food Summit.⁵ The consequences are dramatic and sometimes irreversible; they impact on the physical, social, and economic development of the communities concerned.

⁵ FAO 2003 - FAO Bulletin of Statistics, 2003 (Vol. 4) (No. 1) 1-115. Viale delle Terme di Caracalla, 00100, Rome, Italy. FAO Bulletin of Statistics, 2003 (Vol. 4) (No. 1) 1-115

3.2.2.2 Fish, as a source of “rich food for poor people”, can play an important role in improving Africa’s food security and nutritional status. Fresh, but more often smoked, dried, or even as powder, fish is a critical source of dietary protein and micronutrients for many isolated communities in rural areas. Fish may also be the sole accessible and/or affordable source of animal protein for poor households in urban or semi-urban areas. Nutritionally, fish is therefore one extremely important direct source of protein and micronutrients for millions of people in Africa. Moreover, fish also contributes indirectly to national food self-sufficiency through trade and exports. In equivalent terms, 50% of the low-income food deficit countries’ import bill for food was paid in the year 2000 by receipts from fish exports.

3.2.2.3 Fish supply in Africa is in crisis. Per capita consumption in sub-Saharan Africa is the lowest in all regions and it is the only part of the world where consumption is declining. The main reasons for this decline are the levelling off in capture fish production and the ever-growing population. In order to even maintain the current level of per capita supply of fish in sub-Saharan Africa (6.6 kg/year) up to 2015, fish production (capture fisheries and aquaculture) must increase by 27.7% over this period. This assumes an average annual population growth of 1.9% over the period 2002–2015. Unfortunately returns from Africa’s capture fisheries are stagnating and access to food, incomes, and livelihoods for the small-scale fishers, who depend upon them, are likely to reduce further. As demand for fish and competition for access to fishing areas increases, lower income groups are likely to become marginalized, replaced by more powerful groups with growing interests in these scarce natural resources.

3.2.2.4 Development of the fishery and aquaculture sector is an important aspect of improving the livelihoods of millions of Africans. The Bank, through its fishery and aquaculture portfolio is a highly important and relevant contributor to the development of the sector. Development and implementation of a monitoring system to gauge the contribution of the Bank portfolio towards development objectives such as the MDGs is recommended.

3.2.3 Structure of the portfolio

3.2.3.1 At a time when fisheries development assistance is globally decreasing, the Bank fishery and aquaculture portfolio is the largest single source of financing to the fisheries sector of Africa totalling nearly 246 million UA, and can contribute greatly to a pan-African strategy for fisheries and aquaculture. The portfolio has 21 projects (19 single country projects and 2 multi-country projects) spread over 23 different countries. To date there has been limited success for the two multi-country projects as a result of poor design and implementation problems. Globally, regional approaches to fisheries issues are becoming increasingly common with regional economic communities, large marine ecosystem programmes, and regional fishery management organisations all giving exclusive attention to this approach. The building blocks for effective regional cooperation are strong national systems of fishery governance, capacity, and infrastructure.

3.2.3.2 The Bank has greater competence in implementing national projects. However, strengthening links to the regional programmes and activities and supporting and building RMC capacity to participate in these fora should be integrated where and when possible.

3.2.4 Focus of the portfolio

3.2.4.1 The strategic plan of the Bank for 2003 – 2007 emphasizes the need to define its areas of focus through greater selectivity of operations and better targeting of resources at country level. This will be better achieved by taking into account the Bank's experience and competencies and recognising the areas in which other development partners may be better equipped to take the lead. To increase synergy and to increase the benefits for beneficiaries, the AfDB policy and programme focus should be developed in light of how it can contribute towards an overall pan-African approach.

3.2.4.2 The Bank has a good basis to cooperate with regional and international partners due to shared mandates and objectives. The emphasis that the Bank places on prioritising programmes that promote regional economic cooperation and integration is in line with the Regional Economic Communities (RECs). For many of these organisations, this objective and that of poverty reduction are the main pillars of their respective policies. Cooperation with other key partners, most notably NEPAD as the pan-African organisation that has mapped out an overarching plan for fisheries that also links to the RECs, is highly recommended.

3.2.4.3 The main framework in place is the strategy for the development of African fisheries and aquaculture as proposed by the NEPAD CAADP programme. This framework has six pillars and the current fishery and aquaculture portfolio of the Bank contributes heavily to the pillars of human and institutional capacity building, the development of sound management tools and their implementation, and sustaining and increasing overall production.

3.2.4.4 The lack of institutional capacity and infrastructure are well recognised as two key limitations in the development of African fisheries (especially the artisanal sector) thus the relative importance placed on these by the Bank is appropriate. Also, the Bank as an institution with complex procedures is less dynamic in response to changes in approach than other organisations. This is often seen as a disadvantage, but if the areas of involvement are selected carefully to focus on items that require long-term approaches, the Bank is more likely to succeed in its interventions. For this reason institutional strengthening (including capacity building) and infrastructure development make good choices for the Bank focus. These are all required elements of the pan-African strategy for fishery and aquaculture development, as established by NEPAD. They are areas requiring long-term development and thus suitable for an AfDB focus. To improve portfolio management and success the AfDB fishery and aquaculture sector requires a focused sector policy to avoid future fragmentation.

3.2.4.5 The AfDB does not currently focus on aquaculture projects and in light of limited human capacity on aquaculture it is advisable to ensure that the required expertise and competence is available if this area of the portfolio is increased. Although the requirement for aquaculture development in Africa is evident, it may be argued that the AfDB would be better placed to focus their portfolio in the areas where they have proven expertise and experience rather than expanding into areas requiring additional capacity in an already highly under-resourced sub-section. The experience of aquaculture development in Africa is limited. State-financed initiatives have often had limited success (Cameroon and Kenya), while lake-based aquaculture has had some success where the private sector has been involved (Zambia and Zimbabwe). Most aquaculture

development in Africa has been freshwater aquaculture with some marine culture of shrimp, algae and marine grasses. If the Bank can increase its resources and capacity to cover aquaculture, then it would be advisable to work closely with the NEPAD CAADP programme to implement the African action plan for aquaculture to find a core niche area for the AfDB within this action plan.

3.2.5 Infrastructure

3.2.5.1 Infrastructure projects are an important financial component in AfDB financed projects in the fisheries sector. There is a need to balance investment in physical and (in some cases) social infrastructure with the resource base of the fisheries as the construction of infrastructure may contribute to overexploitation. While access roads are important for the marketing of fish and fish products and may make a positive contribution to economic and social development, infrastructural development may encourage over-fishing in zones where there is inadequate data on fish stocks and their biology and where there are no fisheries management plans. In this case encouraging greater fishing effort may further deplete stocks and threaten the livelihoods of fishing communities. Best practice examples of infrastructure management (e.g. the Djibouti fishing port) should be learnt from.

3.2.5.2 The June 2008 AfDB workshop made the following specific recommendations:

- The management regime of infrastructure components needs to be decided at the beginning of projects;
- The case studies of Gambia (community management) and Djibouti (private sector concession) are examples of successful infrastructure management;
- There should be more staff management exchanges between projects including site visits to cases of successful management;
- Feasibility studies must consider the financial viability of different management options;
- Infrastructure components must take into account the proposals of national strategy documents.

3.2.6 Credit

3.2.6.1 Several projects have credit components which have varying degrees of success. There is a need to study what are the conditions and requirements for successful intervention in the design of credit components. Again as in the case of infrastructure, the lessons of projects with relatively successful credit components - Cameroon, Guinea and others - should be studied. Issues of credit in the fisheries sector are problematic for a number of reasons:

- The problem of collateral for loans;
- The mobility of fishers ;
- Issues of non repayment ;
- Relatively high interest rates for artisanal fishers.

3.2.6.2 Group collateral is one solution where cohesive fishing groups/associations exist. Again as with infrastructure, credit allocation and the impacts on fishing activities and fishing effort need to be taken into account. An increase in fishing effort and capital investment where knowledge of stocks is incomplete or unknown may threaten stocks and the sustainability of the fisheries. The AfDB June workshop made the following recommendations with respect to credit components:

- Credit should be considered where the fisheries sector is important and where it will have an impact on poverty reduction;
- The selection of financial institutions must take into account their capacity;

- Micro credit and rural credit may need to be dealt with by different institutions and the existence of micro-credit institutions needs to be considered during project evaluation;
- Strategies for savings need to be considered;
- Lessons from best practice on AfDB projects with credit components need to be taken into account;
- Repayment performance is an important criteria for the sustainability of credit projects;
- AfDB projects should not create new financial institutions;
- The specific needs of fishers need to be taken into account;
- Agreements with financial institutions should include risk sharing with government.

3.2.7 Research and Development

3.2.7.1 With respect to research and development (R&D), the Bank has very limited resources. R&D is however vital to the sustainable management of artisanal, semi-industrial and industrial fisheries in Africa, notably in stock assessment, marine and freshwater environmental studies. Without a good scientific base the future sustainable exploitation of fisheries is at risk. Increasingly, scientists and policy makers are emphasising the need for an ecosystem approach to fisheries management. In several cases - Benin, Cameroon, Djibouti and other African countries - there is insufficient scientific knowledge of stocks and their biology. While the AfDB cannot itself provide such expertise it is vital that it supports such R&D. In other cases close collaboration with regional and national research institutions is vital, including the work of RFMOs (e.g. tuna management in the Indian Ocean) and the work of IRD and IOTC.

3.2.7.2 Where there are straddling/shared stocks, the role of RFMOs and large marine ecosystem (LMS) studies (Benguela Current, Canary Current, Gulf of Guinea etc) are vital for the coastal states concerned. In other cases, the AfDB may tap the resources of other institutions (e.g. the World Fish Centre, FAO and NGOs) and bilateral supported programmes such as the NORAD-financed Fritjof Nansen Programme.

3.2.7.3 The Bank should continue to support research and development, especially through regional organisations and bodies, in order to ensure that decisions relating to the development of fisheries and aquaculture in Africa are based on sound scientific, social and economic information.

3.2.8 Monitoring, control and surveillance (MCS)

3.2.8.1 The specifications of the terms and conditions under which resources can be harvested are normally contained in national fisheries legislation and provide the basis for which fisheries management arrangements, via MCS, are implemented. The Bank portfolio appears to provide limited inputs to the development of legal and policy framework, which again may be a weakness if it is not covered by other projects in the fishery sector.

3.2.8.2 Fisheries surveillance is critical to ensure that resources are not overexploited, poaching is minimised, and management arrangements are implemented. Only four RMC with ongoing fisheries projects have good or moderate operational MCS enforcement capacity (specifically operational surveillance capacity). Where MCS components exist within the project portfolio – such as on the projects in Cameroon, Gambia, Guinea, Guinea-Bissau, Malawi and Rwanda - they are usually limited to the supply and operation of small inshore patrol boats.

3.2.8.3 Current fisheries management thinking suggests that even if the State does have adequate MCS resources to pay for fisheries enforcement measures it is unlikely that the ‘top down’ approach on its own works. This approach has been tried in many countries around the world (including most RMC) and is invariably judged to have failed. First, the failure to involve fishers, fishing communities and industry in setting rules means that inappropriate rules are often set in the first place. Furthermore such rules, which when imposed without consultation or agreement with stakeholders, often lack legitimacy among those against whom they are directed and are consequently not followed. Finally, the nature of the fisheries sector is such that the costs of enforcement are prohibitive and unaffordable for most RMC. Weak enforcement in turn leads to reduced incentives for compliance leading to a gradual breakdown of management systems. All of the above are very typical and symptomatic of the current situation being faced in the implementation of many of the AfDB’s projects across the continent.

3.2.8.4 The Stop Illegal Fishing Programme is an African programme that promotes a four part approach that would be useful to consider in all AfDB projects. It works to: i) Improve national fisheries MCS capability and capacity with a view to eradicating illegal and unreported fishing; ii) Develop a regional MCS strategy, a regional plan of action, collaboration and information sharing to stop illegal fishing; iii) Utilise possibilities along the chain of custody of fish and seafood as a means to controlling IUU fishing and iv) Strengthen fisheries governance and legal frameworks to eliminate illegal fishing.

3.2.9 Sector-wide approach and participation

3.2.9.1 Institutional strengthening is the component of the AfDB fishery and aquaculture projects that attracts the largest financial allocation. This stresses the awareness of the importance of improving governance and advocacy of projects and the sector. However, the lack of adequate analysis of the institutional framework is undermining the establishment of mechanisms to support public, private or civil society organisations. The AfDB would benefit from defining how and when they work with these partners in an early phase of the project cycle. The establishment and involvement of AfDB offices is an excellent means to strengthen local institutional links and should be encouraged.

3.2.9.2 Traditional fishery management systems are also the norm in the RMC. They are often fragmented and lacking inclusive systems of sector governance or sector-wide policy or planning. Sector-wide approaches to development facilitate improved governance as well as facilitating improved communication, cooperation and links between all stakeholders in the sector. Sector-wide analysis and planning facilitate the best allocation and use of resources to address both the most pressing needs in the sector first, as well as incorporating longer term requirements.

3.2.9.3 All AfDB fisheries projects engage with the private sector. The majority of the beneficiaries are private sector fishers, fish processors and traders. Further engagement with the private sector may be possible in various forms these include collaboration with: international financial institutions and private sector banks which have or are developing portfolios with the fisheries and associated sectors; private sector fisher and trade associations; projects where management and other functions have been sub-contracted to the private sector; public-private partnerships where infrastructure development may be managed and or pre-financed by the private sector; private sector banks and credit institutions; and private sector sponsorship of fishing communities (e.g. oil and gas companies). It should be added that in many cases the commitment

of the banking sector to fisheries development is limited in what is considered to be a high risk area, particularly to artisanal fisheries.

3.2.9.4 The links between different aspects of a sector-wide approach are missing in some projects. One such issue concerns the lack of baseline studies on fish stocks, resource assessment and the availability of fisheries management plans. These are pre-requirements for infrastructure development and the promotion of production and marketing. A sector wide approach to fisheries development must not ignore the links between fisheries and other economic sectors. These include:

- Oil and Gas – the increase in world oil prices has stimulated offshore (and onshore) exploitation of oil and gas reserves. This development may also have implications for the marine environment and fisheries sectors (physical conflict between oil and gas vessels and infrastructure and the potential impact of pollution on fisheries). There are several African countries where oil and gas exploration is proceeding and where the Bank has financed projects. They include Cameroon, Gabon, Mauritania, Mozambique and Uganda;
- Forestry - wood and vegetation used for fish smoking and wood used for boat building;
- Agriculture - agriculture is often a complementary activity to fisheries development in Africa, particularly with inland fisheries. In other cases (e.g. small scale aquaculture) this may potentially provide a complementary source of income for farmers;
- Industry – the fisheries industry has important supply chain linkages with other sectors including traditional and industrial fish processing, gear and equipment supply, boatbuilding and boat repair;
- Tourism - this sector provides opportunities for fishers - sales of fish and recreational fishing. However, tourism development also poses threats such as the impact of tourist complexes on access to beaches and landing points (e.g. the Indian Ocean coast in Kenya);
- Environmental management - both inland and marine fisheries have important implications for the environment including the relationship between fisheries and biodiversity, coral reefs and other fragile marine environments. Environmental management cuts across several economic sectors.

3.2.9.5 Each fishery project does not need to cover all aspects of a sector-wide approach or sector policy but each project needs to fit into a sector wide approach to facilitate overall sector governance. Fishery sector policy that encourages participation should ideally be in place in all RMC where the AfDB has projects; if not, then the project should look at ways to develop this. Fishery management plans are one of the ways to implement fishery sector policy and the AfDB, within its existing portfolio and in the design of future projects should identify where it can support and mainstream these into projects. This would ensure that adequate base-line information is available to support sector developments in areas such as institutional and capacity assessment of stakeholders and assessments of fishery resources.

3.2.10 Project cycle management

3.2.10.1 This was assessed to be generally weak in the projects reviewed, but is an area that can easily be improved. Project preparation has been variable and in some cases inadequate to facilitate project implementation, monitoring and evaluation. The need for a much more rigorous approach to project planning and the screening of projects during the appraisal period is evident.

3.2.10.2 In conformity with the Bank rules, project preparation should be based on the logical framework approach (LFA) including participation by key stakeholders and a situation analysis.

All project elements (goal, purpose, outputs, activities and inputs), assumptions and the means of verification and indicators must be included in the LFA matrix. The fishery projects LFAs also need to contain indicators to facilitate the assessment of project financial, social and economic impact. A portfolio LFA with nested project matrices should be considered as it would greatly ease the assessment of the contribution of the projects to the overall objectives of the portfolio as well as to simplify portfolio management.

3.2.10.3 Project start-up has been hampered by delays and needs to be improved. It is recommended that after proper project preparation an inception phase is incorporated into all future projects. Monitoring and evaluation also need to be improved. Mid-term reviews and annual monitoring and evaluation by the AfDB are regularly not being completed timely or adequately. It is recommended to implement a system for reviews that links to LFAs.

3.2.10.4 Project completion reports need to include critical information required to provide a rapid overview of the project and an adequate analysis of the key factors that have accounted for the projects achievements and any failures. All projects require exit strategies to ensure that their impacts are sustainable and that required elements can continue after the project funding has ended. For projects close to completion this is essential and priority must be given to preparing them.

3.2.10.5 The quality and standard of the LFAs within the current projects vary enormously. Many are poorly constructed (such as too many outputs or outputs not related to components), and risks and assumptions are often poorly defined. There also appears to be little consistency in their layout and some projects have two LFAs, one to cover the loan component and one the grant, which is considered inappropriate given that the objectives invariably remain the same. There is little mention of environmental or gender specific objectives in the LFAs and they are often inadequately constructed, particularly at the level of project objective and goal. There is limited or no mention of project compatibility with international legal conventions and directives or with REC policies with respect to fisheries, the environment and gender.

3.2.10.6 If designed and used properly, an LFA is a useful project planning and management tool that encourages clarification of the economic logic underpinning the design of a project and provides a conceptual framework for both the economic and social analysis projects. Use of such an integrated framework should also promote transparency and accountability in project delivery, and promote the more efficient use of resources. The development and consistent use of a suitable project implementation framework for the AfDB fishery and aquaculture portfolio would markedly improve the efficiency, effectiveness and impact of the fisheries and aquaculture portfolio across Africa.

3.2.11 Portfolio and project implementation capacity

3.2.11.1 The limitations in delivery of the portfolio that are linked to the management in the AfDB fisheries and aquaculture sub-sector are directly related to lack of sufficient human resource capacity. Individual projects have been delayed and procedures not always followed due to a lack of adequate follow up, monitoring and evaluation, feedback and general guidance. This requires time from the AfDB fisheries team and without this the public image of the Bank will suffer and the portfolio will not achieve its potential. To adequately manage a portfolio of 21 projects with a value of 246 million UA, the division in charge of fisheries requires strengthening. The current team of fishery and aquaculture experts are qualified, dedicated and cover a broad range of skills.

Their limitation is the time they can dedicate to each project or aspect of portfolio and sector management.

3.2.11.2 The team requires expertise that covers a range of disciplines including; fisheries management, fisheries economic, policy and planning, aquaculture, resource assessment, financial analysis, MCS and project management. If this range of expertise existed in adequate supply it would allow all project evaluation, supervision and midterm reviews to have at least one and preferably two fisheries specialists involved and allow the Bank to engage in regional and international dialogue.

3.2.11.3 Project management unit staff are vital for the successful implementation of projects and efforts to fill all positions with suitable staff are essential. Staff should be supported with clear mechanisms for operation and adequate project management (including LFA and framework analysis) and procurement training. Procurement procedures and lack of information, training and awareness were seen as a major factor contributing to the large delays in the fishery portfolio. However, the capacity, commitment and efficiency of the PMU staff in the case study countries were generally high. AfDB procedures are often complex and cumbersome resulting in delays in disbursement and procurement approval. There is a need for more systematic training in the use of the Bank's Rules of Procedures which should be formalised early on in the lifecycle of a project.

3.2.11.4 Exit strategies are required to ensure the required levels of sustainability in human resources on project completion. To this end, the PMU must take the time and effort to organize and build the capacities of beneficiaries to take on more responsibilities in the fishery projects.

3.2.11.5 Links between the PMU teams and the AfDB core staff could be improved through meetings on a two yearly basis when all project managers meet with the AfDB staff to receive training, share ideas and lesson learning and report on project progress. PMU and AfDB staff would benefit from training courses for in the preparation of logical frameworks to ensure consistency and rigour in the formulation.

3.2.11.6 The AfDB fishery and aquaculture sub-sector requires strengthening. The AfDB should consider employing more professional staff or establishing an advisory group of professionals that work on a part-time basis to support and compliment the AfDB fishery team. Regular meetings between AfDB staff and all project managers would facilitate training, lesson learning, building a joint spirit and facilitate information exchange.

3.2.12 Integration of cross-sectoral aspects into the portfolio

3.2.12.1 The mainstreaming of environment considerations into all fishery projects should be based on an approach that aims to actively strengthen the ability of RMCs to appreciate the potential trade-offs that can be expected from the choices that they make. An Environmental and Social Management Plan must be developed during project design and include environmental costs in the cost benefit analysis. Evaluation of this plan must form part of the routine monitoring and evaluation of the project. Education and communication aspects should be included in projects to build awareness about possible environmental impacts (positive and negative). The project LFA requires environmentally relevant indicators to be incorporated and should include activities that will contribute towards the collection of information on these. Implementation and monitoring of an agreed set of environmental safeguards is required for each project.

3.2.12.2 More research is needed to better understand the impacts of climate change on fisheries in Africa and to determine how current coping strategies can be supported for short-term and long-term adaptation. It also calls on climate change adaptation planners to focus on the needs of fishing communities and consider the ensuing impacts of adaptation activities in other sectors. Fisheries management needs to tackle over-exploitation of resources and work with other sectors to reduce vulnerability in the fisheries sector. Policy-makers also need to be sensitised to ensure they actively integrate climate change issues into existing fisheries policies. Adaptation strategies should be based on an “ecosystem approach”, defined as a comprehensive and holistic approach to understanding and anticipating ecological change, assessing the full range of consequences, and developing appropriate management responses. Although a relatively small contributor of greenhouse gas emissions, there are certainly areas in which fisheries and aquaculture have a responsibility to limit such emissions as much as possible. For example, eliminating inefficient global fleets and fishing practices would reduce fuel needs; increasing efficiency of aquatic farms would decrease water and energy use; and reducing post harvest losses as well as increasing waste recycling will shrink the sector’s carbon footprint.

3.2.12.3 Women do play an important role in fisheries and therefore their participation should be encouraged and integrated into project design. In the context of the AfDB portfolio no project has the improvement of the status of women as its primary objective, but all projects do benefit women especially through support to micro-finance and fish processing and marketing activities as well as through the development of social infrastructure such as water facilities. For instance in the project in Cameroon, 68% of fishery operators are women and they represent 75% of the credit beneficiaries. Projects, such as the ones in Uganda, Benin, and Sierra Leone, which combine resource management activities with support to alternative livelihoods, provide significant economic benefits for women.

3.2.12.4 There is a need to support the development of gender-focused socio-economic information. Funds for preparatory phase assistance and, where necessary, initial socio-economics investigations, should become an essential component of funding policies. Gender related socio-economic information and gender-specific indicators should be consolidated and utilized for the purposes of project identification/formulation, implementation, monitoring and evaluation.

3.2.12.5 Project formulation and monitoring missions should be given briefing kits that include gender-relevant information. Screening of project documents should ensure that gender concerns are explicitly recognized and addressed in project activities. Project implementation units and government staff should be sensitized and become fully aware of the importance of gender issues in fisheries and aquaculture development. In this respect, the example of the fisheries project in Mozambique which is supporting the design and implementation of a gender-mainstreaming strategy for the artisanal fisheries sector should be followed more systematically. The recognition of the importance of addressing gender issues in poverty reduction programs should more explicitly acknowledged in projects design.

3.2.12.6 Also, AfDB projects can increase their activities with respect to reducing the prevalence of HIV and AIDS in fishing communities by encouraging awareness and engaging resource-user participation in management of the project.

3.2.12.7 At a minimum, environmental and social indicators should be incorporated and monitored in all fishery and aquaculture projects. By improving the sector-wide approach and the participation and inclusion of a wider stakeholder group, projects could increase the benefits to the beneficiaries.

3.2.13 Communication and cooperation

3.2.13.1 The AfDB at a higher level does engage with other partners including BADEA, FAO, IFAD, the World Bank and some bilateral donors. It is important that the AfDB maintains this dialogue with international financial institutions, bilateral donors and other institutions that have interests in fisheries development and trade.

3.2.13.2 However, at the fishery level with limited human resources to undertake the core functions of portfolio management, it is not surprising that the two-person fisheries team have limited opportunity to optimise and benefit fully from regular and worthwhile communication and cooperation with partners. If the team is strengthened, this valuable activity could increase and this would improve greatly the interaction between the AfDB and the AU, NEPAD, the Regional Economic Communities and the Regional Fisheries Management Organisation as well as the international fishery world.

3.2.14 Progress and achievements since the 2000 fisheries portfolio review

3.2.14.1 The 2000 fisheries project portfolio review provides a useful baseline for the current portfolio review. It appears that many of the issues raised by the 2000 review still remain today. The extent to which the issues raised by the 2000 fisheries portfolio review have been addressed in the more recently implemented projects is summarised in Table 2.

Table 2: The 2000 fisheries portfolio review – key issues and progress in implementation

Key issue	Comment in the 2000 review	Progress in implementation since 2000
AfDB policy for the fisheries sector	Projects should comply with AfDB's vision for the fisheries sector with more emphasis on sustainable development, integrated development, coastal zone management, private sector partnership and promotion of aquaculture.	The vision for the fisheries sector is not clearly articulated anywhere – so it is difficult to assess this.
Credit	Credit should be through a financial intermediary such as a bank; direct management of credit is problematic.	This would generally seem to be the case however in some cases the financial intermediary has failed (Djibouti), a virtual credit supply monopoly has been established (Malawi) or there have been problems dealing with AfDB procedures. In other cases the procedures of the AfDB are a barrier to the disbursement of credit (Benin). There is also a general problem finding qualified MFIs to implement credit schemes for fishermen which is part of the overall problem in Africa when credit is delivered to the rural sector.
Infrastructure	There seems to be a heavy emphasis on physical infrastructure in many projects. This needs to be seen in the context of the balance between fish stocks and fishing effort in order that projects may support the sustainable development of fisheries.	Investment in infrastructure including boats, gear and equipment should be based on adequate stock assessment and resource management yet this is not always the case. There is also a lack of attention to developing appropriate exit strategies for infrastructure operation and maintenance.

Key issue	Comment in the 2000 review	Progress in implementation since 2000
Training	Training covers fishers, trainers, traders, fish processors, project management.	Most projects have a training component and considerable funds are allocated to this. The targets for numbers covered often seem highly ambitious, given project resources and time scales.
Institutional Development	This is mainly technical assistance.	Institutional development using local resources and staff has been developed and may be more sustainable than external technical assistance in the longer term.
Development of Aquaculture	Aquaculture is a component in 8 of the projects that we have reviewed. The 2000 review identified problems with aquaculture projects in Guinea with more successful projects in Côte d'Ivoire and Burundi.	There remains problems with aquaculture projects, for example in Cameroon there are already several aquaculture projects which are unsuccessful; government-run aquaculture projects which rely on public subsidies and other incentives are often not sustainable; this sector is often better led by the private sector.
Cross cutting themes	These might include poverty reduction, income and employment generation; environmental management.	The elements of such cross-cutting themes are generally contained in the projects reviewed, however they are not necessarily integrated in the project in a coherent manner.
Project milestones	Inadequate following of project milestones.	This remains a problem in most projects which have been subject to delays for various reasons – in some cases project start-up is delayed by over 18 months.
Incomes and employment increased	An important component in poverty reduction.	Income and employment generation are recognised in most projects, however these are predicated on the medium to long term sustainable exploitation of fisheries. It is difficult to measure the financial and economic impacts of projects when these are not included as metrics in the log frame and in the cost – benefit analysis.
Project Design	Project design should take into account the priorities and national policies of RMCs.	National policies are generally taken into account. There may be problems when RMC governments change policy during the lifetime of the project or where the priorities for the fisheries sector have not been properly established through strategic plans for fisheries management and the development of the sector.
Fisheries management and resource conservation	Conservation and resource management not sufficiently integrated into projects.	The issue of adequate resource and stock assessment is still not being properly addressed. The development of participatory co-management regimes is not being adequately promoted.
More emphasis should given to fisheries projects by the AfDB (CZM, aquaculture etc)	Coastal zone management is increasingly recognised as important by the AfDB as well as other financial institutions; the experience with aquaculture has been very mixed.	There is a very variable level of performance by AfDB projects; it is not always clear the extent to which AfDB projects take into account other initiatives in RMCs e.g. by RMC governments, World Bank, EU, bilateral donors etc. Aquaculture is a component in 6 projects.
Stakeholder involvement	Stakeholder involvement is insufficient.	There still needs to be more involvement by stakeholders at the design stage of projects e.g. women re gender, health, access and land issues.

3.2.14.2 The gap between the comments contained in the 2000 fisheries portfolio review and the degree to which progress has been made in meeting these objectives suggests that such reviews need to be followed by a detailed action plan with timelines, clear objectives and project milestones. Assuming that the 2000 review was accepted by the AfDB Board and the relevant policy makers it is difficult to understand why some of these objectives have not been implemented. It may in fact be because of the limited human resource capacity of the AfDB to promptly address such issues.

4. THE WAY FORWARD

With an identified shortage of human resources, the reality of implementing these review recommendations may appear a daunting task. However, if the objectives of the projects are going to be achieved and the benefits from these increased - then some changes are required. The action plan (Table 3) schedules short, medium and long term actions that the division in charge of fishery and aquaculture could conduct, if given adequate financial and human resources to do so, that would result in significant improvements to the portfolios delivery and impact.

Table 3: AfDB action plan for the fisheries and aquaculture portfolio

Timeframe	Action	Comments
Short term (up to 12 months)	Preparation and Board approval of a AfDB fisheries and aquaculture sector policy document – to include an overall sector-wide approach to planning and to improving fishery governance.	This will involve defining the focus of the AfDB and it is recommended to do this in line with the NEPAD/CAADP plan for African fisheries and aquaculture – the core AfDB staff may require assistance to do this.
	Establish a sector specific advisory team of companies and consultants who are able to support AfDB management of the portfolio.	This will assist in the human resource pressure on the sector that allows flexibility but also some continuity.
	Hold a workshop with the project managers to disseminate the results of this review, training in project cycle management, preparation of LFAs and procurement procedures.	Use this opportunity to start the redrafting process for the project LFAs – the core AfDB staff will require assistance to do this. The recent workshop in Tunis (June 2008) was a useful initial start in receiving the comments of project/task managers on their specific project concerns.
	Review the project data collection and information management systems of the AfDB for fisheries projects to ensure that they are regularly updated and easily accessible.	There is evidence that some project documents and supporting material are not easily available on the current project information systems.
	Establish a plan to redraft all project LFAs into the correct format with adequate policy detail, economic analysis and verify impact indicators for monitoring and evaluation including indicators of social and environmental impact.	Link to the training of project managers – the core AfDB staff will require assistance to do this.
	In the light of this evaluation review best practice from on – going and past projects.	This proposal was also raised by several task managers at the June 2008 AfDB workshop in Tunis. Examples of best practice were given by a number of managers including Djibouti and Gambia.
Medium term (> 12 months to 36 months)	Implement the updating of all existing and project pipeline LFA in detail. Link all the LFAs into a coherent framework that shows indicators to the overall sector policy.	This will be a lengthy process, that will involve stakeholders in each project – but the final framework will facilitate improved management of individual projects and the management of the portfolio.
	Undertake a ‘best practice’ analysis of appropriate aid donors	This exercise could be taken in cooperation with the key African inter-governmental organizations and donors.

Timeframe	Action	Comments
Medium term (> 12 months to 36 months)	Implementation of the newly drafted sector policy through monitoring and evaluation and review procedures in each project.	This will be a gradual realignment for existing projects.
	Establish a RMC database within the AfDB of fisheries relevant information.	This will form part of the improved monitoring of the fisheries portfolio with indicators from the LFAs being the core information in the database.
	Develop key linkages with international financial institutions and research institutions which are engaged in finance and support to the fisheries sector including FAO, the World Bank, World Fish and other organisations. Relations with bilateral agencies with programmes in the fisheries sector should also be encouraged.	Although the AfDB has some linkages through co-funding and other programmes, there is a need for these to be strengthened. There are many policy changes taking place at the international and regional levels and the AfDB needs to be continually updated on such initiatives.
Long term (> 36 months)	Establish a project implementation policy of 1-3 month inception phase for all pipeline projects approved by the Board in 2007-2009 and which cover the period after 2010.	This is an important element for all new projects that should greatly reduce the many delays that have occurred in the current projects.
	Review the new sector policy and strategy and ensure that the pipeline and future projects will assist in fulfilling this.	The new sector approach may leave gaps in the portfolio – the process of identifying new projects can be undertaken as part of the African wide approach of NEPAD.