

Report of BATAT Marketing Design Team

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1. INTRODUCTION

As mandated by the National BATAT Core Committee, the National Marketing Design Team submits this report on the broadening of access to agricultural marketing to all farmers. But particularly to those farmers and potential farmers previously excluded from full participation in the agricultural industry.

The information used was obtained from Provincial marketing design teams, from discussions and submissions by various participants in the present agricultural marketing system, and from various experts invited to a special arranged conference on the subject. Secondary material as well as the experience of members of the Department of Agriculture were also drawn on.

This report constitutes the first input into a subject that has rarely been discussed, particularly in South Africa with its historical exclusion of black and sub-commercial farmers, and its heavy regulation of the marketing of agricultural products. Also the National Agricultural Marketing act is still to be finalised. This means that further reports can be expected after inputs have been received from all stakeholders, most important of which are the farmers themselves.

The design team does not consider the broadening of access to agricultural marketing as a discriminatory or exclusive process, even though emphasis is put where needs are greatest at this particular time. And not only does it restrict itself to the needs of farmers, but also with those of middlemen and consumers.

This document emphasises practical solutions and prioritises them according to impact and immediacy of implementation. And recognises, indeed challenges those on the ground to flesh out and develop further the stated proposals.

2. MARKETING IN CONTEXT

Agricultural marketing can be defined as all activities associated with the flow of agricultural products, inputs and services from producers to consumers, in such a way that consumers needs are satisfied and producers are fairly rewarded.

Where agricultural marketing has been heavily regulated as in South Africa, the state has historically taken most of the responsibility for marketing. And consequently the role of marketing is not sufficiently appreciated. Thus marketing is often erroneously equated to selling or even to market regulation and control.

In reality, marketing begins when the farmer decides what to produce, how and how much to produce, as well as when to produce. Since the farmer does not generally produce for the sake of producing. But in order to make as much money as possible through the sale of his products, the nature and needs of his market should be fundamental to his production decisions.

While agricultural land, finance, technology, advice, human and other resources provide the farmer with the means to produce; it is agricultural markets that provide him or her with the motive to produce at all. Where government takes it upon itself to buy all the farmers's produce, the farmer surely does not have to worry about marketing. However, South Africa's agricultural sector is deregulating, and farmers will now be required to take notice of, and hone their skills in marketing.

For the small and emerging farmer, already burdened with serious disadvantages, this looming competition introduces yet another risk factor to his operations. Especially when he is called upon to compete against established counterparts. Government therefore, does not only have to afford him access into the existing agricultural marketing order. But also has to ensure that he has a chance to sustain his activities and prosper.

The sub-commercial and emergent farmer is often not regarded as a legitimate target for government market development programmes. This stems mainly from the historical failure to appreciate the aspirations, motivations, and practices of those previously excluded from the market. Situations of unbelievably high personal enterprise, and market risk precluded resources poor farmers from engaging in uncertain entrepreneurial activities. However, in a changed environment, they will be expected to compete in the market as any rational economic man or woman would.

The deregulation of agricultural marketing does not only threaten the emergent sector of the industry, but also concerns the established but previously protected agricultural sector. In effect, there are serious advantages to be gained by all those who prepare themselves adequately for deregulation. And where government, middlemen, and farmers form an active alliance, there can only be gains from a more efficient allocation and use of scarce resources. And increased benefits to both producers and consumers.

Most stakeholders in the industry appreciate the need for deregulating the agricultural marketing function, although debate still rages as to the extent and pace of such deregulation. The BATAT National Marketing design team after studying the Ampec reports, and after numerous discussions with stakeholders, concluded that a strategic approach to broadening access would be preferable to a legislative one. Hence all that is needed from the proposed act is to ensure that it does not unduly discriminate against the emerging sector.

Previous agricultural marketing policy promoted self sufficiency even in those products or areas where there was a distinct comparative disadvantage. This process tended to favour the producers at the expense of consumers and tax payers, while also causing the inefficient distribution of natural and production resources. It is noted that the new policy direction calls for food security through production and importation. Therefore, strategies leading to detrimental market distortions for any

sector of the community, as well as those resulting in the inefficient allocation of scarce resources are expressly discouraged.

It has been said that wherever there is under-development, marketing will also be found to be the most under-developed economic activity. Efficient agricultural marketing stimulates production and enhances consumption and income generation. All these are basic ingredients of economic development.

For an aspirant farmer, and a well intentioned advisor, the question becomes:

Would you produce or cause to be produced a product, at great cost and effort, if you do not have the slightest idea how much it is going to sell for, or if it will be bought at all ?

2.1. Barriers to agricultural markets

The following were identified as the major obstacles to entry into markets, particularly in the case of emerging and small farmers.

- Management and basic business skills
- Information
- Communications
- Roads and vehicles
- Storage
- Extension Advice
- Finance and credit
- Bargaining power and institutional capacity
- Processing technology
- Legislation and regulations

It was recognised that the first requisite of successful marketing is a marketable product, and that small and emergent producers in particular face serious problems and need much help in their production activities. The areas of agricultural finance, technology, extension, and human resources are being addressed simultaneously. It is therefore hoped that the product question will largely be addressed from that side.

Some of the stated problems were found to be merely symptoms of underlying problems, and the team had to interpret them. Some farmers might therefore feel that the listed problems do not coincide precisely with the information they gave. They should however be assured that their problems were addressed as the proposed solutions will reveal.

3. MEANS TO ENHANCE ACCESS TO AGRICULTURAL MARKETS

3.1 The legislative and regulatory framework

3.1.1 The Agricultural Marketing Act is the prerogative of the National government. It is presently being redrafted. The act itself is a subject in need of comprehensive debate and cannot be discussed here. However the following should be noted:

The proposed act not only favours deregulation, but insists on an inclusive representation that involves both small farmers and consumers, as well as a more transparent method of operations for the various statutory bodies. In this alone it will serve to ensure that the emerging and small farmers will be at the table to determine their own fate.

It is however questionable why the proposed marketing authorities in charge of commodity marketing schemes should possess statutory powers. It would seem that once a scheme is formulated in an inclusive and transparent way, all it needs is an efficient management structure. The delegation of

statutory powers, especially in a situation of sharply skewed bargaining and conceptual capacities should be approached with caution. And where possible, avoided altogether.

Without appropriate government intervention there will be no spontaneous development of the marketing system. While most improvements in infrastructure take some time; reforms in marketing policies, strategies, and institutions can produce results in a relatively short time.

To this effect the National government should legislate for an effective, productive, and fair agricultural environment through the national agricultural marketing act. Timely consolidation of the various marketing acts within the country is also necessary in order to eliminate the prevailing confusion within the farming sector.

3.1.2 Also, in line with the provisions of the new constitution of the Republic of South Africa, provincial and local governments should ensure the existence of a non-discriminatory, transparent, and empowering legislative and regulatory framework, within which the marketing of agricultural products can take place.

3.1.3 The Provincial Departments should set up Agricultural marketing development forums to facilitate and coordinate provincial marketing by carrying out the following functions.

- Coordinating provincial and community marketing and development efforts.
- Bringing all provincial market participants to a negotiating forum.
- Establishing a central contact point for ministry and government to deal with agricultural marketing issues.
- Heightening the awareness of consumers, farmers, traders, processors and government to each other's concerns.
- Revealing possible opportunities and linkages among participants.
- Promoting the involvement of all parties in shaping marketing policies.
- Promoting the awareness of agricultural marketing and participation in its activities.
- Interpreting and facilitating the dissemination of the underlying logic and provisions of marketing legislation
- Ensuring that the regional marketing and consequent regulations are applied.
- Promoting the RDP from the agricultural marketing side.
- Representing the Province in the National Marketing Council.

3.1.4 In contrast with past practices; the application of various acts and regulations particularly at provincial and local level, should be seen to be fair by all participants within the agricultural products markets.

3.1.5 The role of government in marketing should not be overestimated or distorted. In line with the White paper on Agricultural Policy, the following should apply:

- Government will only intervene to address market imperfection and to eliminate socially undesirable factors in the marketing of Agricultural products. And even when it does so, it will use market instruments themselves to bring about the desired effect.
 - The role of government should not be interpreted to mean undue protection from ordinary marketing forces or discrimination against other participants.
 - In reality the competitive nature of marketing means that there will be losers and winners. And the idea is not the total elimination of losers, but the elimination of harmful distortions as well as the stabilisation of the environment.
 - The inherent nature of agricultural production means that government intervention in the marketing process is an unavoidable necessity. However, responsibility for the marketing function itself, should be clearly vested in the market participants if the sustainability of marketing efforts is to be assured.

3.1.6 Government intervention in the marketing system should be directed at the cause of the perceived problem and not at its symptoms. And transparent and inclusive operation should ensure that the most socially justifiable instrument of intervention is used. In this regard; *all control legislation and regulations, including those dealing with health and standards should be reviewed to ensure that they accurately reflect social values and preferences. There is also a need to coordinate and simplify all agricultural marketing standards and norms to ensure that all participants understand them well enough to use them in their activities.*

3.1.7 Small farmer participation in statutory bodies and development forums should be focused on, to ensure proper representation, confidence, legitimacy, capacity, and continuity. *Where dire lacks in representational and bargaining capacities are identified, government should act emphatically to rectify the situation.*

3.2 Infrastructure

The development and maintenance of rural infrastructure, including marketing infrastructure has been undertaken almost entirely by government. The participation of local communities, farmers and traders was often neglected. This lead to ineffective planning and a lack of interest and commitment of the supposed beneficiaries towards using and maintaining the facilities.

Local organisations, agencies and groups should be central in the setting of priorities, in the planning of facilities, and should also contribute in some way to the provision of infrastructure. The RDP emphasises the importance of allowing beneficiaries to identify the real needs, and then to team up with them in special job creation programmes. While one should guard against the provision of inappropriate facilities, it should also be noted that one needs to build for growth and not merely fossilise the present.

The lack of capital for investment in rural infrastructure is closely related to historically rural neglecting financial institutions and policies. The on-going investigations into rural finance should strive to provide some answers toward investments in rural infrastructure.

Uniform product pricing, such as that promoted by single channel fixed price schemes, provided little incentive for farmers, cooperatives and private traders to invest in and maintain private infrastructure. The elimination of discouraging cross-subsidisation to allow for seasonal and spatial price differentiation is a prerequisite to private investment in for instance transport and storage.

3.2.1 The most cost effective storage of agricultural produce is one that which allows delivery to match the steady consumption demands, while catering for seasonal delivering schedules and a buffer to cushion delivery delays. *In order to assess storage needs at least the following questions would need answering:*

- *supply and demand projections by region taking into account changing population needs.*
- *projected market surplus and market demand.*
- *seasonal and crop specific shares*
- *capacity inventory of storage , processing , both public and private sector*
- *assessment of rail ,road and other transportation capacity in season*
- *estimates of efficiency of utilisation of all existing infrastructures.*

This data would provide the basics for identifying investment needs by the region. And analysing the alternative strategies possible, especially where location and transportation options are interrelated. Where private sector is to play a role, agricultural investments by government can be expected to influence private sector response.

3.2.2 Government often concentrates on prestigious through roads that merely hasten the passage of potential customers through an area. *More emphasis is needed on secondary penetrating roads that ensures reasonable access to regional economic nodes. And also among the rural areas themselves. New road building methods coupled to job creation schemes of the RDP are one way to go. Once roads are in existence it can be expected that individuals and entrepreneurs will provide the*

necessary vehicles. Where this is not readily forthcoming, government might have to introduce incentives.

3.2.3 While in most cases the government has simply allocated an unjustifiably small amount of public resources to rural economies, in others the problem has more to do with the lack of institutional capacity in these areas. Government will therefore have to facilitate the provision of basic infrastructure in the affected areas, while also ensuring that local capacity exists to own and use them.

Care should therefore be taken not to overemphasise infrastructure over necessary institutional change leading to situations where particularly small farmers become efficient but remain poor. For instance where they are in a weak position as outgrowers selling to a monopolistic processor, or more commonly where they become marginal participants in a strong cooperative.

4. MARKETING STRUCTURES AND ENTERPRISES

The complexity and significance of the market process has often been underrated at considerable cost to development. Small and emergent farmers tend to incur higher transaction costs than larger producers, because the quantities of inputs they need and of output they sell are so much smaller. They are often less informed, less confident, and thus have less bargaining power. Important for them are the consideration and assistance they receive from marketing enterprises.

4.1 The following table serves to compare the different marketing enterprises:

Marketing structures	Small farmers vis-à-vis large farmers	Small farmer vis-à-vis buyer	Technical assistance	Input provision	Other credit	Government support required
Private firms	Bargaining weight can be used against small farmers	Advantage of access to alternative outlets	Advice based on local experience	May supply on credit	Other credit often available in addition	Provision of infrastructure and information services. Ensure competition. stabilisation.
Marketing and processing concerns	Equitable prices if can get contract	Dependent but secure if can meet product quality requirements	Can be direct and intensive	Direct supply on credit	None	Should guard against exploitative practices.
Coops	Equal if operating successfully	Favourable provided coop operates efficiently	Cooperates with govt service	Direct supply on credit	May supply if supported by Agric bank	financial support, supervision and protection needed
Marketing boards or State trading agencies	Equal price if able to reach official buying station	Depends on access to buying station; may be subject to illicit charges	Usually left to govt service	Assistance rare	None	Insistence on measures to help farmers at rural buying points
Development corporations	Equal prices	Protected provided can meet product quality requirements	Can be direct an intensive	Direct supply on credit	None	Major financial input or privileges usually required

The following factors should also be considered when choosing between the different marketing structures:

4.2 Often small farmer cooperatives especially those established at the behest of the state, are coalitions based on non-economic principles. They display no real consciousness of the common objectives, and certainly no strong will to realise these objectives.

Greater care should be taken in defining tangible economic benefits of cooperative action. Administrative convenience or ideological reasons are simply not good enough. The upward transfer of power to regional and national unions and federations should be limited to where such transfer is beneficial. Otherwise the local farmers loose the very same hold on their own affairs that they first set out to achieve, while national unions representing a wide variety of interests and large membership, tend to be insensitive to unique concerns.

The following are conditions favouring the establishment of cooperatives

- *Specialised producing areas distant from markets.*
- *Concentration upon and homogeneity of production for markets dependent on one or a few crops for income.*
- *Local leadership and management*
- *An educated membership*
- *Strong kingship*

4.3 Government marketing agencies or boards are set up to administer schemes that buy and sell physical commodities in order to stabilise prices or even to promote social causes such as food security.

Rural or producer interests call for such agencies to raise purchase prices, while consumer or urban interests call for reduced retail prices. Such a no win situation often results in the agency becoming not only a financial burden to government, but also ineffectual in achieving stated objectives.

4.4 The private sector generally responds to short to medium term gains, and avoid uncertainty and risk. *They cannot be relied upon to nurture small farmers out of own goodwill. However, the private sector can be a very willing and effective partner if government programmes make it worthwhile for them to participate.*

4.5 This is a system where agricultural production is carried out according to an agreement between the farmer and processor which places conditions on the production and marketing of a commodity. It is often refereed to as satellite or outgrower farming.

The advantage to the farmer is the assured market. And in as far as the farmer is free to contract to his benefit, the relationship can be very rewarding. The main danger here is monopolistic exploitation.

4.6 Government marketing boards and development corporations generally have an unfortunate performance record in South African agriculture, mainly due to the following:

- Concentration on market control rather than marketing facilitation.
- Close attachment to government and political interference
- Poor management and inappropriate or unskilled staff
- Lack of accountability and motivation.

As a result, they are now regarded as an ineffective and wasteful option. And their use will require innovative restructuring, the setting of checks and balances, enhancement of accountability to farmers, and a lot of convincing arguments to the political leadership.

5. TRAINING IN AGRICULTURAL MARKETING

5.1 In order to attract busy farmers and traders a training programme should be:

- interesting and obviously valuable

- suit their time schedule
- gain their professional confidence
- use the language they all understand

In general, farmers and traders are not interested in lengthy theoretical lectures by officers who have no practical experience. They want to be confronted with know-how and skills which if applied in their work will help them to gain more money or to do the same job with less resources and effort. One should therefore fully understand the client and his aspirations by involving them from the planning stages of the courses

5.2 Successful practise oriented training depends on the recruitment and training of the right personnel. In the case of marketing trainers the following should serve as a guideline, The trainer should have:

- *The necessary social attitude , interest and enthusiasm , as well as the natural ability to transfer know-how to others*
- *Sufficient practical, technical and commercial experience to be able to understand the thinking, language and expectations of clients and ability to demonstrate in practice what is taught in training sessions.*
- *Willingness to learn , listen and adapt to new situations.*

Training programmes for target groups often weak in educational background demand strong support by visual aid material and adequate illustration using local examples. However, visual aid materials serve only as a strong support mechanism and cannot replace qualified instructors or practical demonstrations.

6. AGRICULTURAL MARKETING EXTENSION

While production extension is widely available, marketing extension can rarely be found for the effective implementation of marketing development programmes. An efficient marketing extension network is essential, and it should carry out the following :

- *Advice on product planning : careful selection of the crops to be produced according to marketability is essential.*
- *Facilitate the provision of market information : the information must be that which has direct impact on farmer's activities.*
- *Secure markets for farmers : assist in finding markets for small farmers.*
- *Advice on improved marketing practises : advise and train farmers in improved harvesting methods, grading and standardisation, packaging, handling, and storing methods.*
- *Promote group marketing : because of the limited quantities marketed by individual small farmers group marketing can help in transportation and group bargaining.*
- *Advise on establishment and operations of rural markets : can advice and or assist the local authority in planning rural markets, in designing their structures and advise on their improved operations.*

To support the Marketing extensionists a Provincial agricultural marketing development and promotion unit should be set up within the provincial department of agriculture. The unit could deal with issues concerning cooperatives, the provincial marketing forum, and the administration of any aspect of the National Agricultural Marketing act delegated to it. Such an office should have adequate stature and authority to carry out its task.

7. AGRICULTURAL MARKETING INFORMATION

Marketing information services have the function of collecting and processing marketing data systematically and continuously. And of making it available to market participants in a form relevant to their decision making. The purpose of such information services is to continuously enhance market transparency through:

- Creation of stimuli by indicating market opportunities.
- Stimulation of competition among suppliers and traders.
- Promotion of the adaptation of supplies to the development of demand
- Reduction of seasonal and erratic price variation and associated market risk
- Provision of data as a precondition for the planning and control of market interventions.

In order to evaluate the performance of a marketing information service, the following aspects must be discussed:

- *relevant* - contents must be related to information needs of target group.
- *meaningful* - precisely specified with regard to location, time and formulation to be understood by target group.
- *reliable* - accurately and regularly collected and transmitted.
- *promptly available* - transmitted while still useful.
- *easily accessible* - available to all without undue effort.

In the initial stages of economic development, agricultural market information may not play a very important role. A need for an information service first appears with rising market production and a falling significance of subsistence production. Therefore its content and extent should be in relation to such development.

8. AGRICULTURAL PROCESSING

Both the national and regional economies gain by adding value to their raw products during processing. Since locally processed goods could substitute for costlier imported products, and since processing uses labour more intensively and provides employment. Incomes can be expected to rise. By facilitating the establishment of such agribusinesses, a new and reliable market for agricultural products in an area or sector can be unlocked.

Also since major processing projects have linkage effects to other businesses, there could arise a multiplier effect. Local food processing concerns could also serve to improve nutritional standards and contribute to food security. However, while the advantages of agribusinesses are obvious, history indicates that the problems involved are not so readily appreciated. Some of these problems are outlined below:

- *Definition of role not adequate, and no proper feasibility study conducted.*
- *No market studies often leading to overestimation of capacity needed.*
- *No setting up of outlets before resuming production.*
- *Over-elaboration above buying power of locals in standards and packaging.*
- *No accommodation of seasonability by introducing a product mix.*
- *Local taste to be studied, not merely assumed to follow international taste.*
- *No assessment of raw materials availability.*
- *Operational inefficiency of enterprise relating to management and labour.*

- *No sales promotion.*
- *Unsound location based not on economic but political considerations.*

Small operations are often keen in both operation and profit and should be encouraged in conjunction with the Department of Trade and Industries' small and medium enterprises development.

Government policies on imports and exports need revision, particularly where cheap basic foodstuffs compete with local production. It is also these policies which can assist small producers and processors to enter the international market.

The provision of community based micro processing facilities such as basic slaughter houses should serve to improve hygiene standards, facilitate spontaneous and enterprising marketing, and introduce improved methods of local processing.

9. THE MARKETING OF AGRICULTURAL INPUTS

It is important to link the marketing of agricultural inputs to the marketing of agricultural produce in order to ensure that they affect and relate to each other. Failure to do so would be tantamount to keeping accounting credit and debit entries separate, and thus being unable to tell the status of the enterprise.

Bringing the two together should serve to:

- *ensure that the type, quality, quantities and prices of inputs are related to the expected income from their use.*
- *take advantage of market channels and contacts that already exists.*
- *take advantage of possible financing schemes inherent in such a dual arrangement.*
- *foster genuinely closer and sensitive relations between the producers of inputs and the farmer.*
- *address the issue of collateral in credit , at least in part.*
- *reduce risk in credit provision and therefore encourage private sector credit by assuring repayment.*

10. AGRICULTURAL MARKETING POLICY

10.1 A marketing policy is needed to:

- guide policy on marketing enterprises and facilities, monitor their performance and ensure that credit, transport and essential supplies are available when needed.
- coordinate continuing support services including market information, marketing extension, standardisation of weights, measures, and quality specifications, export quality control, and others.
- Maintain a continuing focus on the use of labour intensive procedures in marketing and processing, and on measures to assist smaller production and marketing enterprises.

The following policy issues should also be observed:

10.2 Improvement in infrastructural facilities is an obvious measure with large potential gains for both producers and consumers. However, institutional change should always accompany and even precede such improvements.

10.3 Wherever possible, government should endeavour to eliminate uncertainty and reduce risk so as to allow medium term rational production decisions to come to fruition.

10.4 As a rule the government should avoid the physical handling of commodities in the marketing environment.

10.5 A proper storage system could go a long way towards reducing shortages, wastages, and price fluctuations. Thus contributing to farmer confidence and food security.

10.6 Training in marketing should not only cover farmers but should also cater for traders, processors, and marketing administrators. Educational and training curriculae and courses should be altered not only to put marketing in its true context, but also to be more practical..

10.7 It should be ensured that not only is there inclusive and balanced representation in the compiling of policies and in statutory bodies. But particularly in the operational and managing structures of agricultural marketing institutions.

10.8 Statutory marketing authorities should be required to have an active development strategy to address among others. the needs of small and emergent farmers.

10.9 The efforts of the Department of Agriculture should be coordinated with those of the Department of trade and industries on issues of international trade and agribusiness.

10.10 Research into general agricultural problems and particularly into small farmer production, processing, and marketing technology and techniques should be encouraged. research. The efforts of the CSIR, ARC, universities and private sector institutions should be coordinated through the formation of a national agricultural research forum in order to extract maximum social benefit from their activities.

10.11 The private sector involved in the handling and marketing of agricultural products should be encouraged to appreciate and take up their social responsibilities by engaging the emerging sector.

10.12 It should be ensured that consumer voices are heard, particularly where it concerns indigenous food and fibre. And efforts should be made to facilitate consumer choice and access.

10.13 The national rural development strategy should take cognisance of the requirements of the agricultural marketing strategy, particularly as it regards small farmers. And where there are shared infrastructural needs such as roads and community centres, or institutions and capacity building, there should be cooperation among participants.

10.14 And production should only be undertaken if the market has been clearly identified or where surplus production can be stored for later consumption.

10.15 Policy should not lead to the creation of two markets, one for the established and one for the emerging. But should instead should strive for one market capable of satisfying the needs of a varied clientele.

11. CONCLUSION

In order to broaden access to agricultural marketing, the following broad strategy therefore suggests itself:

- ***First remove obstacles, be they legislative, regulatory, institutional, or otherwise.***
- ***Secondly, enhance the small farmers' ability to seize opportunities through training and advice.***
- ***Thirdly, ensure that they have information, resources and services to succeed.***

- *Fourthly set up a marketing support structure to ensure sustainability and growth.*
- *Then ensure that they have a voice through both organisational development and representation on decision making bodies, from where they will shape his own destiny.*

The order in which these steps are taken should be dictated by the situation on the ground.