

Independent Mid-Term Evaluation

“Survey of Enterprises in Selected ACP Regions”



United Nations
Industrial Development
Organization



African, Caribbean
and Pacific Group of
States



European
Union



Africa Investment Promotion
Agency Network

UNIDO EVALUATION GROUP

Independent Mid-Term Evaluation

**“Survey of Enterprises in Selected ACP
Regions”**

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Abbreviations and Acronyms

ACP	Africa, Caribbean and Pacific Group of States
AfriPANet	African Investment Promotion Agency Network
AIR	Africa Investor Report
AUC	African Union Commission
BNet	Business Directory developed as part of the Programme Bank of Uganda
CAMI	Conference of African Ministers of Industry
CIP	The Census of Industrial Production
COMESA	The Common Market for Eastern and Southern Africa
CTL	Country Team Leader
EAC	East African Community
EC	European Commission
ECOWAS	The Economic Community Of West African States
EDF	European Development Fund
EDIP	Enterprise Development & Investment Programme
F&S	Frost & Sullivan
FDI	Foreign Direct Investment
IMF	International Monetary Fund
IMP	Investment Monitoring Platform
IPA	Investment Promotion Agency
KAM	Kenya Association of Manufacturers
KBStats	Kenya Bureau of Statistics
KIA	Kenya Investment Agency
KIRDI	Kenya Industrial & Research Development Institute
MOI	Ministry of Industrialization (The Republic of Kenya)
NBS	National Bureau of Statistics
NSO	National Statistics Office
REC	Regional Economic Community
SADC	Southern African Development Community
SME	Small & Medium Enterprises
SPX	Supplier & Partnership Exchange
TCCIA	Tanzania Chamber of Commerce, Industry & Agriculture
TIC	Tanzania Investment Centre
TOR	Terms of Reference
UBOS	Uganda Bureau of Statistics
UNIDO	United Nations Industrial Development Organization
WB	World Bank

Glossary of Evaluation related Terms

Term	Definition
Baseline	The situation prior to an intervention, against which progress can be assessed.
Effect	Intended or unintended change due directly or indirectly to an intervention.
Effectiveness	The extent to which the development intervention's objectives were achieved or are expected to be achieved, taking into account their relative importance.
Efficiency	A measure of how economically inputs (through activities) are converted into outputs.
Impact	Positive and negative, intended and non-intended, directly and indirectly, long term effects produced by a development intervention.
Indicator	Quantitative or qualitative factors that provide a means to measure the changes caused by an intervention.
Intervention	An external action to assist a national effort to achieve specific development goals.
Lessons learned	Generalizations based on evaluation experiences that abstract from specific to broader circumstances.
Logframe (logical framework approach)	Management tool used to guide the planning, implementation and evaluation of an intervention. System based on MBO (management by objectives) also called RBM (results based management) principles.
Outcomes	The achieved or likely effects of an intervention's outputs.
Outputs	The products in terms of physical and human capacities that result from an intervention.
Relevance	The extent to which the objectives of an intervention are consistent with the requirements of the end-users, government and donor's policies.
Risks	Factors, normally outside the scope of an intervention, which may affect the achievement of an intervention's objectives.
Sustainability	The continuation of benefits from an intervention, after the development assistance has been completed.
Target groups	The specific individuals or organizations for whose benefit an intervention is undertaken.

Executive Summary

In 2001, UNIDO initiated the Africa Investment Promotion Agency Network (AfrIPANet), to provide African Investment Promotion Agencies (IPAs) with a common platform to discuss and design their investment promotion strategies. As part of this initiative, a series of enterprise surveys were conducted in 2001, 2003 and 2005, followed by the latest project entitled “Survey of Enterprises in Selected ACP Regions”. The project plans included two surveys of investors in the African region. The first survey under this project was planned for 2009, but was conducted over 2010 - 11. A second survey was planned for 2011 but is now expected to be carried out in 2013.

As an integral part of the planned outputs of the project, and in line with the UNIDO Technical Cooperation Guidelines, an independent mid-term evaluation of the first survey was carried out over June – October 2012 in order to feed into the design of the second survey. The evaluation was carried out by a team of external evaluators from Frost & Sullivan; Mrs. J. Saini, Consulting Director, Mr. M. Ranke, Vice President Customer Research, Mr. M. Briggs, Programme Manager and Mr. D. Winter, Business Unit Leader Africa.

The evaluation was conducted in compliance with UNIDO’s Evaluation Policy and attempted to determine as systematically and objectively as possible the relevance, efficiency, effectiveness, impact and sustainability of the project. The achievements of the project were assessed against the objectives and outputs established in the project document, including re-examination of the relevance of the objectives and of the design. The evaluation team has also sought to identify factors that had facilitated or impeded the achievement of the objectives.

The evaluation was carried out through analysis of various sources of information, desk review of relevant project documents such as progress reports, survey data, and primary interviews with various stakeholders and beneficiaries.

The programme was supported by the African, Caribbean and Pacific Group of States (ACP) and European Commission and funded through the 9th European Development Fund (EDF). The main beneficiaries of the project outcomes are:

- Regional Economic Communities (RECs);
- Intermediary Organizations;
- Private Companies;
- Civil Society; and
- International Development Partners.

The project's main counterparts are Investment Promotion Agencies (IPAs) in all participating countries and the African Investment Promotion Agency Network (AfrIPANet). The target audience of the evaluation report are the project donors and – most importantly – the project team responsible for the design and implementation of the second Investors Survey. The latter are the main beneficiaries of the recommendations and lessons learned included in this evaluation report.

Regional Context

Africa has increasingly become a growing market for foreign investment. The resource rich continent has seen foreign, regional and domestic investments rise dramatically. The continent is now home to 7 of the 10 fastest growing nations in the world and is seen as the new growth frontier.

As the table under chapter 2 below shows, Sub-Saharan Africa's share of global investments rose by over 150 per cent over the period 2006-2011. North Africa's share of African foreign direct investment (FDI) dropped significantly over 2006-2011 (by 67 per cent) mainly due to political instability in 2011. A 355 per cent increase in the FDI share of Southern Africa over the period 2006-2011 is particularly noteworthy, even though it was reportedly badly hit by the 2008 crisis. Central Africa too has seen a 200 per cent increase in FDI over the period.

Investments in Africa increasingly come from newly emerging economies. The share of FDI to Africa from developed countries fell sharply over the period 2006-2011, leaving developing and transition economies to increase their share in inward FDI to the continent (in the case of Greenfield Investment projects, from 45 per cent in 2010 to 53 per cent in 2011).

In the context of a rapidly increasing investment trend, concerns have been raised on the socio-economic and environmental impact of FDI, and whether such investments contribute to inclusive and pro-poor economic development.

Project Background

The project was designed in response to needs assessments conducted over a seven year period since the inception of the AfrIPANet Programme: the need for attracting higher levels of quality, pro-poor investment. This is in turn seen as caused by a lack of adequate and quality information for involved stakeholders, which is then to be ameliorated through regional surveys coupled with other analytical and networking tools with use of internet-based platforms for services such as benchmarking and matchmaking for local and foreign companies engaged in various value chains. In doing so, the project aims to enhance regional investment promotion strategies and FDI policies for the greater goal of poverty reduction.

The project's expected outcomes include the enhancement of the policy advocacy role of local institutions/associations; improvements in the overall investment climate; design of targeted investment promotion strategies; improvement of investment services; increased availability of sub-sector level information; and stimulation of research for the analysis/interpretation of survey information. In order to achieve the wider objectives, the project is embedded within a larger programme that includes sub-projects and several donors. These in the main cover the following additional areas:

- Capacity building for national counterparts, including Investment Promotion Agencies (IPAs);
- Production of the Investment Monitoring Platform (IMP);
- Regional harmonization of investment strategies through relevant bodies;
- The establishment of a network of Sub-contracting and Partnership Exchanges (SPX) that aim to support enterprise upgrading and matchmaking.

In the above context, the development objective of the project launched in 2008 was “to support African countries to maximize the impact of foreign and domestic investment on sustainable and equitable growth and poverty reduction; to enhance competitiveness of the manufacturing and services sectors in order to capture export markets and achieve greater integration with global value chains and regional economic markets.”

The two investor surveys were designed to cover 19 African countries (Burkina Faso; Burundi; Cameroon; Cape Verde; Ethiopia; Ghana; Kenya; Lesotho; Madagascar; Malawi; Mali; Mozambique; Niger; Nigeria; Rwanda; Senegal; Tanzania; Uganda; Zambia) and up to 10,000 companies.

The implementation of the two Surveys was subdivided into a total of 12 ‘results’, of which six would be implemented in the framework of the first Survey (2009, conducted over 2010-11) and six in the framework of the second Survey (2011, expected to be conducted over 2012-13). The Independent Evaluation is the first activity foreseen for the second Survey.

The UNIDO bi-annual surveys represent a fulfilment of the basic AfrIPANet objective, as expressed at its launch in 2001.

Key Findings

The formulation of the African Investor Survey 2011 followed a consultative and participatory approach and information from numerous previous UNIDO projects and products were used in project design and implementation stages.

With regards to the consistency between inputs and activities, outputs and progress towards the achievement of the objectives, the project document gives a theoretically coherent approach. However, it is not fully consistent in its presentation, particularly in terms of the relation between the project under evaluation and its umbrella Programme. Moreover, the terminology used for 'activities', 'outputs' and 'outcomes' in the document is not always consistent with standard definitions.

Regardless, most of the project objectives are realistic within the larger programme's framework, although not necessarily having an effect in the short-medium term or standing in a direct cause-effect relationship to the survey itself. In particular, the desired impact on poverty reduction is a long term objective that will need to be complemented by other interventions in order to be achieved.

The survey questionnaire design was in line with the project approach and – in its theoretical design - able to satisfy to a high degree the five groups of beneficiaries of the Report. In practice, however, the survey questionnaire was too long and too complicated to be answered in one or two interview sessions, and concerns were raised by some private sector respondents about the financial sensitivity of some of the survey questions.

The project management arrangements and tools were adequate to support the fulfilment of the project realization plan, and ultimately worked towards achieving the project objectives. Of particular utility were the monitoring platform and the interview scheduling tool that allowed real time monitoring of project progress and risk management.

Based on the feedback received from national stakeholders, the project is highly relevant to the development needs of the target countries and their associations and enterprises as well as their Investment Promotion Agencies (IPAs). For 4 out of 5 respondents from industry, the UNIDO initiative is of interest and relevant, enabling them to analyse their own business performance and to benchmark themselves against peers. The project is strongly relevant to UNIDO's mandate and competencies.

In some instances, inadequate alignment with counterpart survey contents and schedules reduced the scope of ownership and involvement by local stakeholders in the survey process.

Chapter 2 of the Investor Report presents a wealth of relevant information on the characteristics of investment in the sub-Saharan economies included in the survey. If the survey is to be continued and expanded, it is expected that a time series can be built. As of now, this analysis is lacking from the report.

A number of respondents raised the possibility of including country specific chapters or producing standalone national reports to highlight local and regional

investment opportunities based on outputs from the IMP. At present, discussions are underway with Cape Verde to adopt their template for a regional report.

The project's monitoring tools, progress reporting, and the Business Directory were of high quality. The process of establishing the business directory for each of the 19 countries has been the main challenge in implementation and the key cause of overall project delay, and was due to over-optimistic expectations at the project planning stage.

The bulk of the survey work was conducted over a period of 15 months, exceeding original plans by over a year. There was a significant variance in the efficiency of country team leaders (CTLs) and enumerators by country. The training materials were of high quality and deemed particularly useful by the evaluation team, though a high turnover of staff reduced the efficiency of training.

National support given to the project was overall very good, with much positive feedback in relation to the objectives and quality of the survey and (although not always completely satisfying in the planning phase) positive indications of collaboration with national stakeholders. However, there were also some instances where buy-in by local stakeholders/local organizations was less than optimal, and led to delays in project consignment.

The financial delivery of the project's first survey has exceeded original plans. Hence, a challenge in the project budget for the second survey is likely.

The implementation team activities and outputs, including the Investor Report and the IMP have already led to a partial realisation of 3 of the project's 6 Outcomes, namely: 1) improvement of investment services provided to the private sector; 2) increased availability of sub-sector level information for investment decision-making; 3) stimulation of research for the analysis and interpretation of survey information.

With regards to the remaining 3 project Outcomes – 4) enhancement of the policy advocacy role of national institutions and private sector organizations; 5) improvements in the investment climate through reform programmes; and 6) the design of targeted investment promotion strategies as well as the facilitation of consensus building - it will be possible to assess their achievement only following a longer period of dissemination of the project outputs.

Most of the project Outputs have been delivered satisfactorily with the exception of the initial sensitization work that was below expectations and reduced effective buy-in from companies and counterparts; and the dissemination of the Investor Report and the IMP, which remained pending at the time of the mid-term evaluation.

Some project counterparts interviewed felt it necessary for the project to continue for another 3-5 years under UNIDO's management in order to safeguard sustainability. This continuation was particularly needed in order to have the project incorporated in the national framework of investor surveys, and to encourage counterparts to use their own budgets for their country as part of their normal data collection process.

The underlying economic assumption of the project is that enhanced productivity and greater employment generation would be expected to lead indirectly to 'poverty reduction'. However, the impact of employment creation on poverty reduction will depend on other factors too, such as workers' income levels, FDI linkages to local suppliers, characteristics of the work force (gender, age), technology transfer, infrastructure development etc.

In the African context, close attention should also be paid to employment potential in 'beneficiation', particularly in mining and fabrication of minerals. Inadequate attention to these factors in the survey design and the content of the Investor Report is likely to reduce the potential impact of the project.

The Report does not include analyses of investment impact on environmental sustainability, youth or gender. It does not serve as a policy advocacy tool for analysing these issues.

The focus of the Report on IPAs, rather than on the broader issues of industrial development, means that the impact of the Report on promoting political support and assisting private companies in their investment decisions is less than it otherwise could have been.

Recommendations

- UNIDO investor survey project documents should be clear on their intended results and the causal chain leading to them. Inputs, Activities, Outputs and Outcomes should be plainly stated with use of standard terminology.
- As part of its risk mitigation efforts, the implementation team should realistically assess the actual level of support that can be expected by the diverse local stakeholders well ahead of the project execution in order to avoid unforeseen roadblocks and project delays.
- With most project funds already expended, a challenge in project budget for the second survey is likely. A budget and work plan should be developed for the second survey.
- The investor survey process and questionnaires should be revised as follows:

- Reduce the length of the questionnaire so as to ensure company survey interviews take no longer than 30 – 40 minutes (as compared to the original estimated length of 60-120 minutes);
 - Reduce the level of financial detail required from respondents by inserting more closed end questions and by inserting more sophisticated skip patterns;
 - Programme questionnaire should include automatic check routines and currency conversions to avoid mistakes of both respondents and enumerators and reduce requirement of manual checking;
 - Field survey time should be shortened to three to four months (instead of the original 15 months);
 - Local CTLs should be paired with UNIDO staff member who rotates between countries (hybrid solution), or deploy a UNIDO staff member to be local CTL (centralised solution);
 - Spend more time on training CTLs throughout the process, to facilitate seamless integration of new enumerators into the survey teams by undertaking most of the training locally by the CTLs;
 - Training of enumerators should commence a maximum of 6 weeks before fieldwork initiation;
 - UNIDO survey schedules and content should be harmonized with local survey schedules and RECs in order to enhance ownership and relevance of the survey and the resultant Investor Report.
- UNIDO should support individual countries take a lead in generating country specific reports/chapters, based on their individual needs.
 - The Investor Report's relevance and accessibility would be further enhanced by:
 - Adding graphs/charts or conclusions that would make the report more accessible to non-economists, particularly where the analysis is complex;
 - Inclusion of more sub-sector information and analysis;
 - Inclusion of gender, youth and environmental sustainability considerations.
 - In order to enhance the impact of the project, it is highly recommended that the next survey and Report pay closer attention to Africa's extractive industries and associated manufacturing and service sectors. A key area of focus in this regard should be on creating more demand for locally benefited minerals.
 - In order to more realistically assess the impact of investments on 'poverty', the next survey and the Investor Report would need to expand their scope into indicators and analyses that cover such areas as income generation, youth and women, and to address the question of 'inequality' (e.g. through use of the Gini Coefficient) more directly.

- In terms of sustainability, UNIDO should continue supporting this programme in the short to medium term, with the aim of gradually handing it over to regional and local authorities and associations.
- In order to enhance their impact, future Investor Reports should focus less on the needs and priorities of the IPAs and more on those of the key decision-making institutions such as planning and finance ministries.

Lessons learned

Enterprise survey questionnaires that are lean, quick and non-intrusive in terms of financial data are more likely to be effective in gaining private sector cooperation.

Enterprise surveys of a significant volume require strong national awareness raising efforts at the launch stage with public and private sector support and proactive involvement.

Enterprises that participate in investor surveys expect UNIDO's appropriate and timely follow-up through distribution and sharing of survey outcomes, as well as acknowledgement of partners' participation.

1.

Introduction and background

1.1 Introduction

In 2001, UNIDO initiated the Africa Investment Promotion Agency Network (AfrIPANet), to provide African Investment Promotion Agencies (IPAs) with a common platform to discuss and design their investment promotion strategies. As part of this initiative, a series of enterprise surveys were conducted in 2001, 2003 and 2005, followed by the latest project entitled “Survey of Enterprises in Selected ACP Regions”, which is the subject of this mid-term evaluation exercise. The project plans included two surveys of investors in the African region. The first survey under this project was planned for 2009, but was conducted over 2010-11. A second survey was planned for 2011 but is now expected to be carried out in 2012-13.

As an integral part of the planned outputs of the project, and in line with the UNIDO Technical Cooperation Guidelines, an independent evaluation of the first survey was carried out in June – October 2012 to evaluate the first survey in order to feed into the design of the second survey. The evaluation was carried out by a team of external evaluators from Frost & Sullivan; Mrs. J. Saini, Consulting Director, Mr. M. Ranke, Vice President Customer Research, Mr. M. Briggs, Programme Manager, Mr. D. Winter, Business Unit Leader Africa, and Professor Frederick Nixon, former Professor of Development Economics at the University of Manchester. The evaluation attempted to determine, as systematically and objectively as possible the relevance, efficiency, effectiveness, impact and sustainability of the project.

1.2 Evaluation methodology

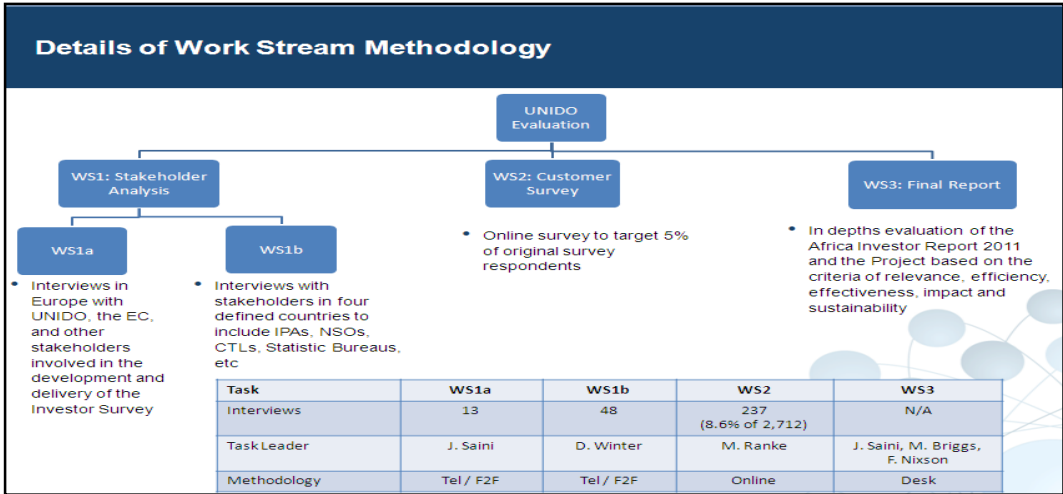
The evaluation was conducted in compliance with UNIDO’s Evaluation Policy and the UNIDO Technical Cooperation Guidelines and attempts to determine as systematically and objectively as possible the relevance, efficiency, effectiveness, impact and sustainability of the project. The achievements of the project were assessed against the objectives and outputs established in the project document, including re-examination of the relevance of the objectives and of the design. The evaluation team has also sought to identify factors that had facilitated or impeded the achievement of the objectives.

The evaluation was carried out through analysis of various sources of information, desk review of relevant project documents such as progress reports, survey data, and primary interviews with various stakeholders and beneficiaries.

Interview guidelines were developed in order to facilitate information collection and analysis, and were used during interviews with stakeholders and enterprises (annex B). With regards to the latter group, an extended survey was carried out collecting feedback from enterprises in Africa. The survey was implemented through an online tool, ensuring full anonymity of respondents, but keeping track of their country of provenance and other data relevant for statistical purposes only.

The evaluation was split into three distinct “work streams” that were undertaken in parallel, and are shown graphically in figure below.

Figure 1: Details of Work Stream Methodology



Source: Frost & Sullivan

Work stream 1a (WS1a) – Interviews with UNIDO and other relevant stakeholders

In order to start to address the issues outlined in the evaluation terms of reference, the objective of WS1a was to collect information from both UNIDO and the European Commission (EC), a key donor in the African Investor Survey project and the AfrIPANet programme. A two-day workshop was held at the UNIDO offices in Vienna, on the 25th/26th June 2012, where Frost & Sullivan were introduced to several key UNIDO project stakeholders, including the unit chief, key implementation team members and the EC Programme manager. Interviews with absentees were held on the telephone, and a follow up workshop was conducted during the course of the evaluation, on 30th/31st July 2012.

Work stream 1b (WS1b) – Interviews with African stakeholders

Some of the key contributors to the Africa Investor Survey were local representatives from each of the 19 countries at a government or association

level, ranging from the Investment Promotion Agencies (IPAs) to National Statistics Offices (NSOs). Close to 50 interviews were conducted for this work stream. The evaluators undertook field missions to around 20 per cent of the countries (4), which were selected with and approved by UNIDO based on a number of criteria, including the response rate to the investor survey. These were Kenya, Tanzania, Uganda, and Ghana.

The main target respondents were local organizations and agencies that supported UNIDO in the project, and the beneficiaries of the report (CTL, NSOs, IPAs, Chambers of Commerce, etc). During the country trips, interviews with businesses that contributed to the survey were also arranged where possible. The key respondents involved in this section of the evaluation are outlined in annex C of this report.

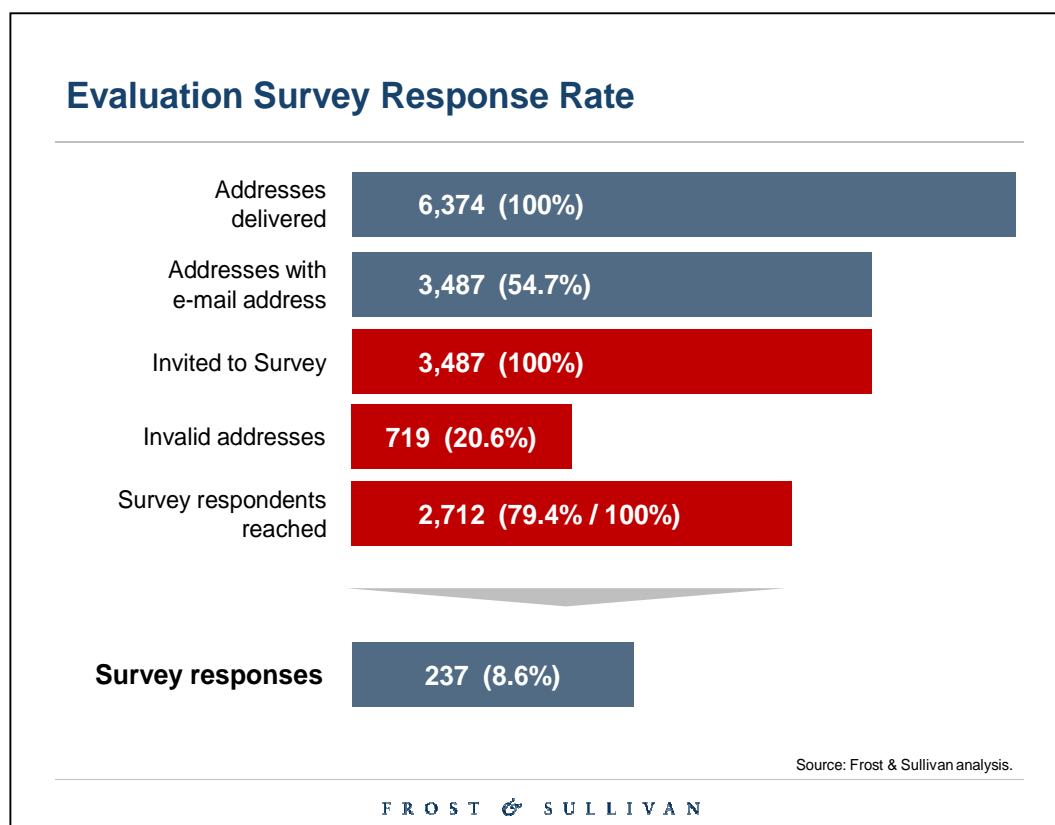
Work stream 2 – Online Survey of Businesses involved in Investor Survey

The Africa Investor Survey was comprehensive, targeting over 10,000 Businesses across 19 Sub-Saharan African countries. Of this, ~6,500 interviews were conducted by the implementation team, with the sample ranging by country.

In order to assess the views of these respondents on the survey and its outputs, the evaluation included an online survey that was sent to all contacts that possibly participated in the original Africa Investor Survey, and those involved in country launch events. The aim was to yield at least a 5 per cent response rate to provide both statistical significance and a range of suggestions in view of the second phase. However, of the interviews conducted, a significantly lower number of contacts provided e-mail addresses, reducing the online survey to a sample of ~3,500 participants.

The online survey was sent to businesses on 3rd August 2012, with follow up reminders sent on 17th and 31st August. The figure below outlines a review of the survey participation. This concludes that of the original sample of 6,374 interviews, there were 3,487 e-mail addresses. Of these, 719 were either invalid or “bounce back” addresses, reducing the sample to 2,712. The evaluation team had received 237 responses to the online questionnaire when closing the survey on 5th September 2012. With 2,712 valid e-mail addresses as the total sample, the response rate was 8.6 per cent.

Figure 2: Evaluation Survey Response Rate



Source: Frost & Sullivan

Work stream 3 – Review of the Africa Investor Report

In order to review the content and statistical significance of the “Africa Investor Report 2011”, an external advisor was brought into the evaluation team; Professor Frederick Nixon formerly of the University of Manchester. His role as Professor of Development Economics and previous roles in East Africa provided the ideal expertise to provide feedback on the analytical content of the report for consideration in the next reporting periods.

Limitations to Evaluation

The evaluation team have considered the African surveys and Africa Investor Report in terms of UNIDO’s evaluation criteria. The Sub-contracting and Partnership Exchanges (SPX) programme and the functionality and evaluation of the Investment Monitoring Platform (IMP) itself have not been subject to evaluation. However, where information was provided by respondents and deemed reliable by the evaluation team recommendations have been included in the evaluation report.

1.3 Project Summary

Project objectives

The project was designed in response to needs assessments conducted over a seven year period, since the inception of the AfrIPANet Programme: the need for attracting higher levels of quality, pro-poor investment. In this context, the development objective of the project launched in 2008 was “to support African countries to maximize the impact of foreign and domestic investment on sustainable and equitable growth and poverty reduction; to enhance competitiveness of the manufacturing and services sectors in order to capture export markets and achieve greater integration with global value chains and regional economic markets.”

Project donors, beneficiaries and counterparts

The programme was supported by the ACP and European Commission and funded through the 9th EDF. The main beneficiaries of the project outcomes are:

- Regional Economic Communities (RECs);
- Intermediary Organizations;
- Private Companies;
- Civil Society;
- International Development Partners.

The project’s main counterparts are Investment Promotion Agencies (IPAs) in all participating countries and the African Investment Promotion Agency Network (AfrIPANet).

Project outputs and timing

As depicted in the below table, the implementation of the two Surveys was subdivided into a total of 12 ‘results’, of which six would be implemented in the framework of the first Survey (2009, conducted however over 2010-11) and six in the framework of the second Survey (2011, expected to be conducted over 2012-13).

Table 1: Implementation of Surveys and Expected Results, per the Project Document

2009 Survey		2011 Survey	
1.1	Project teams and national capacities for data maintenance and updating	2.1	Independent Evaluation
1.2	Sensitization	2.2	Survey methodology and definition of research issues
1.3	Compilation of business directory and sampling frame	2.3	Updating of business directory and sampling frame
1.4	Data collection and quality check	2.4	Data collection and quality check
1.5	Finalization of Survey Report	2.5	Finalization of Survey Report
1.6	Survey Report Dissemination at the country-level	2.6	Survey Report Dissemination at the country-level

Source: UNIDO Project Document

Project budget

The total project budget (as shown in the table 5 below) amounted to €2,769,909, including support costs. The latter refers to the expected expenditures for two surveys over a period of 36 months, as well as the Investor Reports. Expenditures at the time of the evaluation (July 2012) amounted to €2,421,945 with a balance of about €325,000 remaining for the second survey and report to be completed within the remaining project period.

Table 2: Total Project Budget, per the Project Document

Budget category	Budget breakdown per contribution agreement	Project expenditures (as of end July 2012)
Human Resources	€ 1,828,000	€ 1,695,393
Travel costs	€ 491,700	€ 285,920
Equipment	€ 39,000	€ 38,797
Miscellaneous	€ 230,000	€ 243,391
TOTAL (€)		
7% indirect costs	€ 181,209	€ 158,445
GRAND TOTAL (€)	€ 2,769,909	€ 2,421,945

2.

Regional Context

2.1 Introduction

Africa has long been viewed as a poverty stricken continent in need of support by more 'developed' countries. That perception is slowly changing however, as Africa is moving towards a growing market for investment. The resource rich continent has seen investment rise dramatically, as saturated markets in developed countries show a slowdown in growth. The financial crisis that began in 2008 has played a part in the rise of Africa by forcing businesses to look at the African continent for investment opportunities. Africa is now home to 7 of the 10 fastest growing nations in the world and is seen as the new growth frontier. The potential of the continent has been doubted in the past due to political unrest, but with improved stability, the continent has seen investment rise significantly.

China has long predicted this trend and their foresight into the untapped market has seen them take a large share of investment in the African market. China's investment into Africa grew from \$12.6 Billion in 2000 to \$151.4 Billion in 2011 – an increase of 1,200 per cent. There are currently over 800 Chinese firms operating in Africa, which furthers the importance Africa has to the Chinese investment policy. These companies employ domestic labour, which plays a large role in promoting job creation, increasing disposable income and reducing poverty. China has opened the gateway to investment from other countries with the next large investor set to be the United States that has recognised the potential that Africa holds. The investment method of the two are entirely different however, with China focusing on projects within the public sector with a focus on infrastructure investment, while the USA focus is on the private sector, with companies moving to Africa to establish themselves in the African market and take advantage of the large domestic consumer markets available. The growth on the supply side in Africa has been witnessed through numerous infrastructure projects commenced in order to increase network reliability and foster further foreign investments. China has been involved in many infrastructure projects with local governments, offering engineering expertise as well as investment capital. These logistics and network development projects however not only benefit the nations in which they are executed, they improve the overall investment potential and attractiveness of Africa to foreign countries and corporations. With logistics still seen as a deterrent to private sector investment, public sector projects will provide confidence in Africa's potential.

2.2 Foreign Direct Investment Flows- Analysis

The table below, extracted from the UNCTAD 2012 World Investment Report, summarises the following key considerations in terms of FDI in Africa and elsewhere:

- There is an evident global trend for FDI to favor developing and transition economies at an increasing rate;
- FDI to Africa from developed countries fell sharply, leaving developing and transition economies to increase their share in inward FDI to the continent (in the case of Greenfield Investment Projects, from 45 per cent in 2010 to 53 per cent in 2011);
- North Africa has traditionally been the recipient of about one third of inward FDI to the continent, however, inflows in 2011 halved to \$7.69 billion, and those to the two major recipient countries, Egypt and Libya, were negligible;
- Outward FDI from North Africa also fell sharply in 2011 to \$1.75 billion, compared with \$4.85 billion in 2010. These figures are in stark contrast with the peak of 2008 when the outward FDI of North African countries reached \$8.75 billion;
- Growth for the continent as a whole was hampered in large part by reduced flows to North Africa. Inflows to sub-Saharan Africa recovered from \$29.5 billion in 2010 to \$36.9 billion in 2011, a level comparable with the peak in 2008 (\$37.3 billion);
- Apart from North Africa, the rest of the continent is in general performing exceptionally well, and doing so despite the 'global' financial crisis;
- The increase in the share of Southern Africa is particularly noteworthy, even though it was badly hit by the 2008 crisis.

Table 3: FDI flows, by region and economy, 2006-2011

Region/ economy	2006 (Millions of dollars)	% share of total in 2006	2011 (Millions of dollars)	% share of total in 2011	% volume change over 6- year period	% change in share of global FDI over the period
World	1,463,351	100.00%	1,524,422	100.00%	4.17%	0
Developed economies	981,869	67.10%	747,860	49.06%	-23.83%	-26.88%
Transition economies	54,318	3.71%	92,163	6.05%	69.67%	62.88%
Developing economies	427,163	29.19%	684,399	44.90%	60.22%	53.80%
<i>Africa</i>	36,783	2.51%	42,652	2.80%	15.96%	11.31%
<i>North Africa</i>	23,194	1.58%	7,686	0.50%	-66.86%	-68.19%
<i>Sub- Saharan Africa</i>	13,589	0.93%	34,966	2.29%	157.31%	147.00%
<i>West Africa</i>	7,037	0.48%	16,100	1.06%	128.79%	119.62%
<i>Central Africa</i>	2,759	0.19%	8,533	0.56%	209.28%	196.89%
<i>East Africa</i>	2,394	0.16%	3,959	0.26%	65.37%	58.75%
<i>Southern Africa</i>	1,400	0.10%	6,374	0.42%	355.29%	337.05%

Source: UNCTAD 2012 World Investment Report

The increasing investment trend will continue to rise as Africa becomes more attractive to investors. With infrastructure continually improving and resources in abundance, Africa is seen as an area that has the potential for rapid growth. Low resource and labour costs are attractive features for companies looking to expand in the continent. Rapid urbanization and a rising GDP per capita provide a large domestic consumption market, which in turn promotes growth. In the context of a rapidly increasing investment trend, concerns have been raised on the socio-economic and environmental impact of FDI, and whether such investments contribute to inclusive and pro-poor economic development. Several international organizations now aim at supporting the overall investment attractiveness of the continent by – amongst others – providing reliable data and information for local and foreign investors. One of these organizations is UNIDO, which seeks to “support African countries to maximise the impact of foreign and domestic investment on sustainable and equitable growth and poverty reduction; to enhance competitiveness of the manufacturing and services sectors in order to capture export markets and achieve greater integration with global value chains and regional economic markets”.

3.

Project Planning

3.1 Project Identification

The formulation of the African Investor Survey 2011 followed a consultative and participatory approach and numerous previous UNIDO projects and products were used in project design and implementation stages - the AfrIPANet, the SPXs, the 2005 UNIDO Africa FDI survey and the enterprise development and investment promotion (EDIP) agenda to name a few.

Feedback both from the third AfrIPANet meeting in Johannesburg (June 2006) and the expert group meeting under the aegis of the African Union Commission (AUC) in Addis Ababa (March 2007) were also taken into consideration during the project formulation process and survey design. Participants from private and public sectors and RECs (ECOWAS, SADC, and COMESA¹) designed the final programme in an interactive process that involved four regional and 10 national level stakeholder meetings. The Programme was endorsed by the Conference of African Ministers of Industry (CAMI) and included in the CAMI Declaration of 2008 as a key element of the Accelerated Industrial Development of Africa (AIDA). It was also endorsed by the EU-Africa Forum of 2010 and submitted as a recommendation to the AU Summit to expand the Programme to all of Africa.

The 2005 UNIDO Africa FDI survey assisted in the framework for the project, whilst the SPX and EDIP focussed more on capacity building directly, covering foreign and domestic SMEs/entrepreneurs. The aim was to integrate all such elements into one focussed investment promotion Programme, delivered, inter alia, through the Africa Investor Survey Report and the Investment Monitoring Platform (IMP).

The project's development objective and the identification of beneficiaries are clearly stated in the project document and reiterated in numerous other documents used throughout the project lifecycle, be it in management documents (such as status and progress updates), or in survey invitation letters or training manuals.

The main beneficiaries of the project outcomes as identified in the project document are:

¹ ECOWAS: Economic Community Of West African States; SADC: Southern African Development Community; COMESA: Common Market for Eastern and Southern Africa.

- Regional Economic Communities (RECs);
- Intermediary Organizations;
- Private Companies;
- Civil Society; and
- International Development Partners.

The development objective of the project is to “support African countries to maximise the impact of foreign and domestic investment on sustainable and equitable growth and poverty reduction; to enhance competitiveness of the manufacturing and services sectors in order to capture export markets and achieve greater integration with global value chains and regional economic markets”.

3.2 Intervention logic

The project document is not fully coherent in its presentation, particularly in terms of the relation between the project under evaluation and its umbrella Programme. The document switches between the ‘programme’ and the ‘project’ repeatedly, making it difficult to decipher the intervention logic. Furthermore, descriptions of outcomes are numerous in different parts of the document, and can lead to confusion, and the terminology used for various levels of results foreseen is at times unclear.

In order to evaluate the logic of the intervention in more detail, the table below has been developed by the evaluators so as to clarify the relation and the distinction between the umbrella programme and the project. The table shows that the project outputs (numbered 1 to 6) are designed to lead to two of the programme outputs (numbered 1.1 and 1.2), which are expected to lead to programme outcome 1.

Overall, the intervention logic of the programme and the project are clear. As the table shows, a set of inter-related activities and outputs such as surveys, capacity building for national counterparts, regional harmonization of investment strategies, production of the Survey Report and the IMP as well as the SPX and ‘matchmaking’, together with enterprise level support and aftercare were expected to lead to the desired outcomes related to enhanced investments, employment generation and poverty reduction, though the exact relationship between the components and the desired results are not as clearly stated.

With regards to the consistency between inputs and activities, outputs and progress towards the achievement of the objectives, the project document gives a theoretically coherent approach. Most of the project objectives are realistic, although not necessarily having an effect in the short-medium term or standing in a direct cause-effect relationship to the survey itself. The inputs and activities

requested to counterparts and to UNIDO are designed to lead to the expected generation of the main output (Investor Survey Report), which on the other hand is a tool for providing information and data necessary to achieve both the direct and indirect, short-to-medium and long-term project objectives.

Overall the evaluation team deems the survey questionnaires' design in line with the project approach and – in its theoretical design - able to satisfy to a high degree the five sets of beneficiaries of the Africa Investor Report and IMP. It needs however to be mentioned that it should have been foreseen that business directories are either inexistent or unreliable and/or that counterparts will not necessarily provide inputs to the business directory in line with UNIDO's expectations.

In terms of presentation and use of terminology, some issues emerge. For example, in standard project nomenclature, an 'Output' is a direct product of the project. Outputs come about as a direct result of project inputs and activities, and the description of Outputs is usually stated as something that is delivered or produced (e.g. 'a report prepared' would be an Output following a 'survey', which is an activity; or a 'skill imparted' would be an Output after 'training', which is an activity). Thus, the '2009 Survey' or the '2011 Survey' or 'sensitization' would not normally be 'Outputs' in the strict sense of the word. Similarly, a project Outcome is usually described as a change in behaviour. In the project document, however, the Programme Outcomes 1 & 2 are more akin to Outputs (something produced or a skill imparted) while Outcome 3 reads more like an activity ('to proactively support enterprises to improve their...').

Table 4: The Programme's Intervention Logic

The Programme's intervention logic (including the "investor survey project" as Programme Outputs 1.1 & 1.2)			
Main project outputs	Programme Outputs	Programme Outcomes	Development objective
<p>1. Project teams and national capacities for data maintenance and updating.</p> <p>2. Sensitization.</p> <p>3. Compilation of business directory and sampling frame.</p> <p>4. Data collection and quality check.</p> <p>5. Finalization of the Survey Report.</p> <p>6. Survey Report dissemination at the country-level.</p>	<p>1.1. Survey methodology designed.</p> <p>1.2. Survey of enterprises in selected ACP regions.</p> <p>1.3. Monitoring platform established.</p>	<p>1. To establish an Africa-wide investment monitoring platform based on empirical data, provided through two investor surveys in 2009 and 2011.</p>	<p>Support African countries to maximize the impact of foreign and domestic investment on sustainable and equitable growth and poverty reduction; to enhance competitiveness of the manufacturing and services sectors in order to capture export markets and achieve greater integration with global value chains and regional economic markets.</p>
	<p>2.1. Country teams developed for evidence based policy formulation.</p> <p>2.2. Country level consensus among stakeholders established for strategy formulation.</p> <p>2.3. Capacity building for regional harmonization of investment policies.</p>	<p>2. To build up the capacity of national and regional authorities to use the findings of the survey for effectively monitoring investors' feedback.</p>	
	<p>3.1. Sub-contracting and supply chain portal established within Monitoring Platform.</p> <p>3.2. Local companies upgraded and modernized.</p> <p>3.3. Investment Targeting and Support Services (Aftercare established).</p> <p>3.4. Partnership Promotion.</p> <p>3.5. Links between domestic enterprises and international finance and equity funds established.</p>	<p>3. To proactively support enterprises within Africa to improve their competitiveness and link up to global markets and global value chains through supplier/buyer and outsourcing networks, inter-African value chain development and partnership agreements.</p>	
<p>UNIDO inputs: UNIDO IPU Staff: 7 Professionals, 4 General Service Staff and an in-house task force composed of representatives of each UNIDO technical branch. Regional UNIDO Networks in Africa (11 Country/Regional Offices, 6 UNIDO desks in UNDP offices). Resources of the network of ITPO, International Advisory Team of eminent scholars and practitioners for survey methodology and questionnaire design. Financing of preparatory phase for the 2009 Survey - €600,000 provided by the Italian government and UNIDO.</p>			
<p>Counterpart Inputs: The NIPA and other organizations will provide their business directories for domestic and foreign firms as an important input to sampling procedures. Various in-kind inputs including office space and use of other facilities. Participation in meetings and training workshops is crucial. The IC members will make available staff to conduct the domestic investor surveys and ensure broad participation from the private sector.</p>			

Source: Frost & Sullivan

Closer examination shows that the description of Programme Outcome 1 appears to be the same as Programme Output 1.3. Both refer to the IMP being set up,

which appears to be logically inconsistent. However, it is quite clear that the project design was aimed at combining the collected survey data and an updated business directory together with setting up the IMP as an electronic tool (all 'activities'), to lead to the establishment of a properly functioning IMP (Output), which could lead to changes in investment promotion behaviour (Outcome 1).

The project's three Outputs combined with all other Programme Outputs and Outcomes given in the table above are expected to lead to the stated development objective: "Support African countries to maximize the impact of foreign and domestic investment on sustainable and equitable growth and poverty reduction; to enhance competitiveness of the manufacturing and services sectors in order to capture export markets and achieve greater integration with global value chains and regional economic markets."

It is noteworthy that the development objective of the programme/project has at least three different objectives embedded in it:

1. To maximize impact of investment on sustainable growth and poverty reduction;
2. To enhance competitiveness of the manufacturing and services sectors; and
3. To achieve greater integration in global and regional value chains.

As such, it has to be concluded that there is no single over-riding objective in the programme design.

The achievement of higher level development results (Outcomes and Objectives) is normally beyond the scope of a project or a programme alone, and includes a set of assumptions about inputs and support to the overall goal from various quarters. It therefore includes a set of risks that should be taken into account, and, where possible, mitigated within the project design. Similarly, assumptions regarding the roles of partners and various actors should be stated and outlined within a project design, but neither risks nor assumptions are described in the Investors Survey project document.

The above findings and issues also cause the 'success indicators' and the document's logical framework (pp. 40-41 of project document) to become partially redundant in monitoring and evaluation terms, as it is organised along a set of key project milestones rather than a clearly defined results chain.

4.

Project Implementation

4.1 Project Budget

With regards to the implementation phase, the evaluators understand that consideration about costs by the implementation team has been exercised as much as possible (both on staff and equipment, with the team looking to maximise involvement from country partners and sharing of resources). Project expenses were documented and submitted to project stakeholders and donors through periodic project reports. The table below is contained in the July Project Status Report as compiled by the UNIDO project implementation team and submitted to the project donors/stakeholders.

The total project budget as shown there is (€2,769,909) corresponds to the project budget as included in the project document (page 23, chapter XIII Budget). The latter however refers to the expected expenditures for 2 surveys over a period of 36 months, whereas project expenditures (as of end of July 2012) cover only the first survey. A challenge in project budget for the second survey is therefore likely.

Table 5: The Financial Implementation of the Project as of July 2012

Budget category	Budget line	Budget breakdown as per contribution agreement	Project expenditures (as of end July 2012)
Human Resources	11 - International Consultants/Experts	€ 552,000	€ 544,993
	13 - Administrative staff	€ 126,000	€ 157,443
	17 - National consultants/experts	€ 740,000	€ 645,647
	21 - Subcontracting for consultancy services	€ 410,000	€ 347,311
Subtotal		€ 1,828,000	€ 1,695,393
Travel costs	15 - Project staff travel	€ 331,700	€ 173,303
	16 - UNIDO staff travel	€ 130,000	€ 87,850
	35 - Travel for workshops, trainings, study tours	€ 30,000	€ 24,768
Subtotal		€ 491,700	€ 285,920
Equipment	45 - Equipment	€ 39,000	€ 38,797
Miscellaneous	51 - Miscellaneous	€ 230,000	€ 243,391
TOTAL (€)		€ 2,588,700	€ 2,263,500
	7% indirect costs	€ 181,209	€ 158,445
GRAND TOTAL (€)		€ 2,769,909	€ 2,421,945

4.2 Management

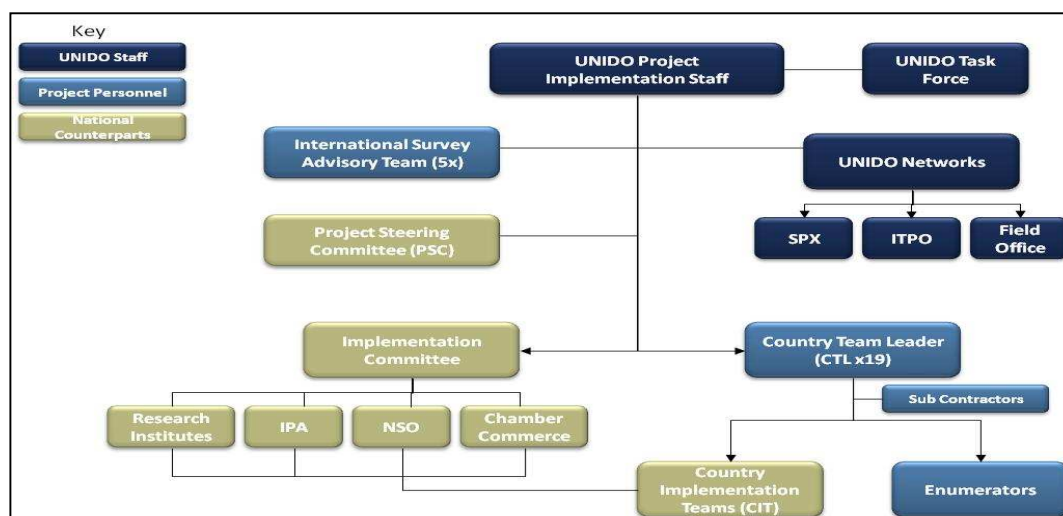
In commencing the evaluation of the Africa Investor Survey project, the evaluators were briefed on project team set up at a managerial level, and in country specific examples. As shown in the diagram below, this consisted of a combination of stakeholders across countries and regions, and included a UNIDO implementation team and task force, responsible for most of the overall managerial tasks and ultimately the project delivery. Several project personnel were also recruited on a temporary basis, ranging from regional experts to local delivery staff (CTLs and enumerators). Lastly, national counterparts, such as Investment Promotion Agencies (IPAs) and National Statistics Offices (NSOs) and associations played a key role in the success of the Africa Investor Surveys.

The above described set-up was broadly in line with the initial project implementation plan highlighted to the evaluation team by the implementation team, with the following exceptions and points noted;

- Regional coordinators and sub-regional coordinators were removed, in favor of this role belonging to the UNIDO implementation team directly. This was deemed to remove an unnecessary layer of management, with the Vienna UNIDO staff splitting the countries they were responsible for, based on their own experience and contacts in those countries
- Sub- contractors were added to the flow-chart; with sub-contractors used in all but two countries, they played an important role in the delivery of local staff and services on the ground;
- Research institutes were added to the flowchart, to demonstrate the involvement of several local and international research bodies, particularly universities (including Leeds, Manchester, Vienna, and Kenyatta).

The project management tools of particular importance included the real time monitoring capability of questionnaire uploads by country. The project team developed a real-time platform, which was utilised as an important project management tool by UNIDO HQ to monitor the surveys undertaken compared to the project plan, immediately enabling the management team to see where targets were not being met, and therefore allowing an early intervention to resolve issues. Furthermore, this method was extended to monitor which industry sectors the questionnaires were being sought from, to ensure a consistent split across all sectors.

Figure 3: The Project Team Set-Up



Similarly, the “scheduling tool” enabled the project team to set up and schedule meetings for the surveys. Whilst this was a useful project management tool in itself, the key benefit was to monitor (in a weekly report format) the performance by country compared to the project plan. This again allowed an early intervention when efforts were not aligned to the project plan.

It was also noted that CTLs were required to submit an interim report every month to report on progress, and to highlight specific problem areas where HQ support would be required.

Regular project status reports were submitted by the UNIDO project implementation team, containing a clear analysis of the status of each project step, to include a summary table with the assessment of core project areas in terms of ‘ahead of schedule’, ‘on schedule’, ‘behind schedule’, ‘in trouble’. In case of ‘behind schedule’ or ‘in trouble’ areas, both explanations and action points were provided.

5.

Assessment

5.1 Relevance and Ownership

Relevance to UNIDO

The strength of UNIDO and its industrial development reporting is in its unique mandate in the UN system. UNIDO's reports provide evidence-based analysis of the process of economic growth and industrial transformation, whereas other UN and non-UN reports might focus more on the infrastructure/the business environmental aspects of a country or region, or their trade aspects alone, often with little country-level operational capacity for the agencies involved. UNIDO has extensive in-country experience in developing countries with a relatively sound local footing throughout Africa, with regional and country offices as well as the ITPO network, coupled with the respect it commands through its knowledge and impartial reporting in international forums. Hence, and for the purpose of this specific programme, UNIDO is a relevant agency to perform the work.

Relevance to target sectors and target countries

The project team worked towards ensuring a balanced and relevant analysis of all sectors as described in the overall programme. Although all sectors were covered, at times the desired sample size/proportion could not be kept – this was mainly due to challenges faced with the accuracy of the business directory. Bearing in mind that several countries and RECs have shown a strong interest in the next survey phase, the business directory is expected to be updated and enriched with the support of local associations going forward, potentially overcoming some of the sample size/proportion challenges.

Several respondents (irrespective of association and/or country) have requested the inclusion of more countries and companies into the overall survey. *“The report and IMP are of good quality, and aimed at facilitating investment decisions. However: not enough companies were surveyed – the sample size should be bigger. The outputs are a very good starting point; once the sample size is increased they will be really valuable! Report and IMP are good outputs, and we would rank this project as a very useful exercise – it will need however a bit of time for both to have an impact but definitively a good guide for investment decisions and investment benchmarking”.*

A number of respondents across Tanzania, Kenya, Ghana and Uganda raised the possibility of including country specific chapters in the Investor Report or producing stand-alone national reports to alert investors to opportunities in their jurisdiction based on outputs from the IMP. The need for country specific chapters has been pointed out by the Bank of Uganda as well: *“we think that country chapters could have been useful. We feel that some of the information is a bit mixed up, and the report is too long. We would have liked to provide more input into the analysis of the report and its final output”*. At present, discussions are underway with Cape Verde to adopt their template for a regional report, using data from the IMP, and such regional reports are being considered as annexes to the Investor Report. This could facilitate further links between UNIDO and the Regional Economic Commissions (RECs) in Africa, as well as be the ideal pilot for country specific information as has been requested.

Although desirable, the evaluation team recognises the challenge of focussing on a country specific analysis yet retaining the impartial overview that the programme is intended for. When considering the issues of foreign and domestic investment, for example, the Tanzania Chamber of Commerce pointed out that local companies don't have access to resources (skills, finance, etc), which is particularly apparent when they compete with foreign organizations, especially in the construction sector, whereas Chinese, Indian, and RSA companies are more competitive for large infrastructure projects. Therefore, the requirements even within a country (in terms of access to investor information) are very different, with many SMEs and local firms requiring capacity building, and foreign firms requiring direct investment level information.

Based on the feedback received by national associations, stakeholders and enterprises, the project is without doubt relevant to the development needs of the target countries and its enterprises. A summary of the feedback sought in the evaluation team's country missions to support the positive evaluation of the project's relevance is outlined below.

The Kenya Investment Agency (KIA) collaborated with UNIDO and provided feedback on the project approach, feeling that *“the project aims and objectives were aligned with the promotion investment requirements that we focus upon”*.

Similar positive feedback was provided by the Tanzania Chamber of Commerce, Industry & Agriculture (TCCIA) *“the implementation was great. I felt that it was an evaluation of the investment on the ground – an investigation of what was actually happening. For us it was a good evaluation of what the TIC, a government sector organization, was mandated to do as an IPA”*. Furthermore, *“the project was well aligned with the requirements of Tanzania; it was built bottom up and showed what is really happening on the ground. It provides an evaluation of investment very useful for the TIC”*.

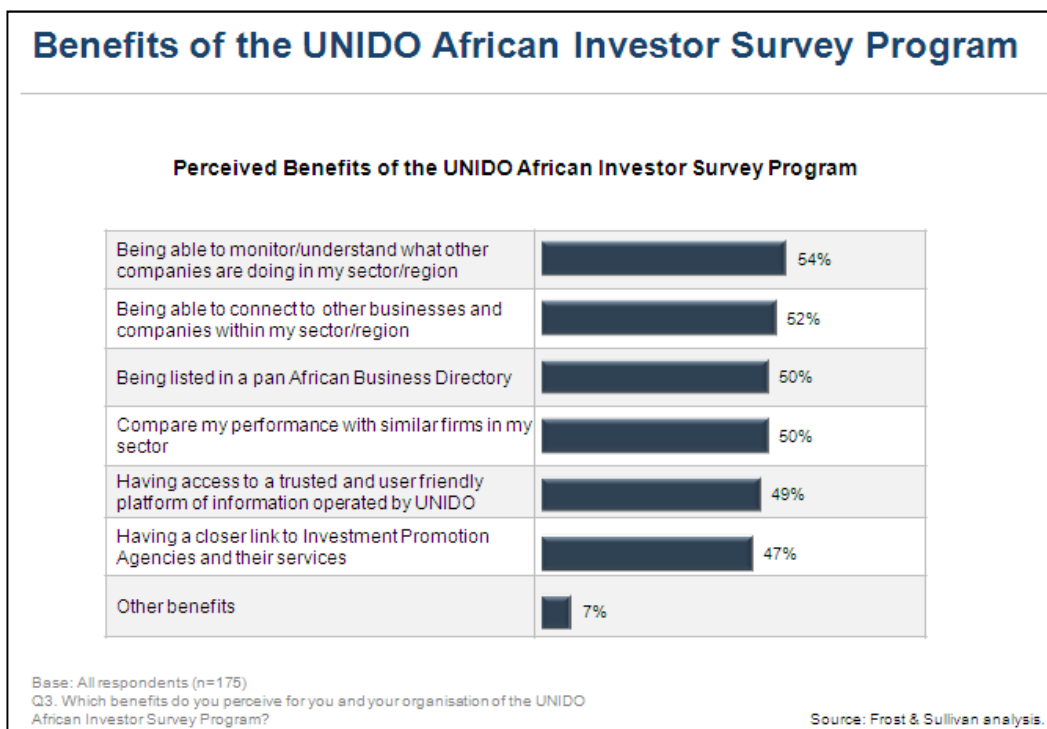
Further feedback was sought in Ghana, where the IPA responded: *“In a way, yes, in that on the platform, the opportunity is created for Ghana as a brand to compare its investments with other competing countries in the sub-region. This*

will enable the country to enact the right laws and also adopt the right policies to make investment promotion, attraction and retention the best on the continent”. “The project output is good to set the baseline information for potential investors”.

When questioned about the relevance of the project design to its development needs and priorities, the Ghana Chamber of Commerce & Industry commented as follows: *“The output of the survey was relevant to provide benchmarking case studies for Ghana. It helps in providing information on where Ghana stands vis-à-vis regional competitors in terms of investment climate. Another usage of the output was for Ghana to develop strategies to overcome all the challenges highlighted in the report i.e. transparency, ease of doing business etc.”*

There were clearly unique benefits of the Africa Investor Survey and this was validated by the online survey conducted with businesses involved in the survey, and as demonstrated graphically below. The most common perceived benefit was competitive intelligence; being able to understand what other companies are doing in that sector/region, with 54 per cent of respondents selecting this feedback. This was followed by being able to connect with other businesses (52 per cent), and being listed in a pan African business directory (50 per cent). Therefore, whilst integrating the African Investor Surveys with other programmes and surveys should be considered, it should not detract from the key benefits of the existing programme, in order to remain relevant and useful to the recipients.

Figure 4: Benefits of the UNIDO African Investor Survey Programme

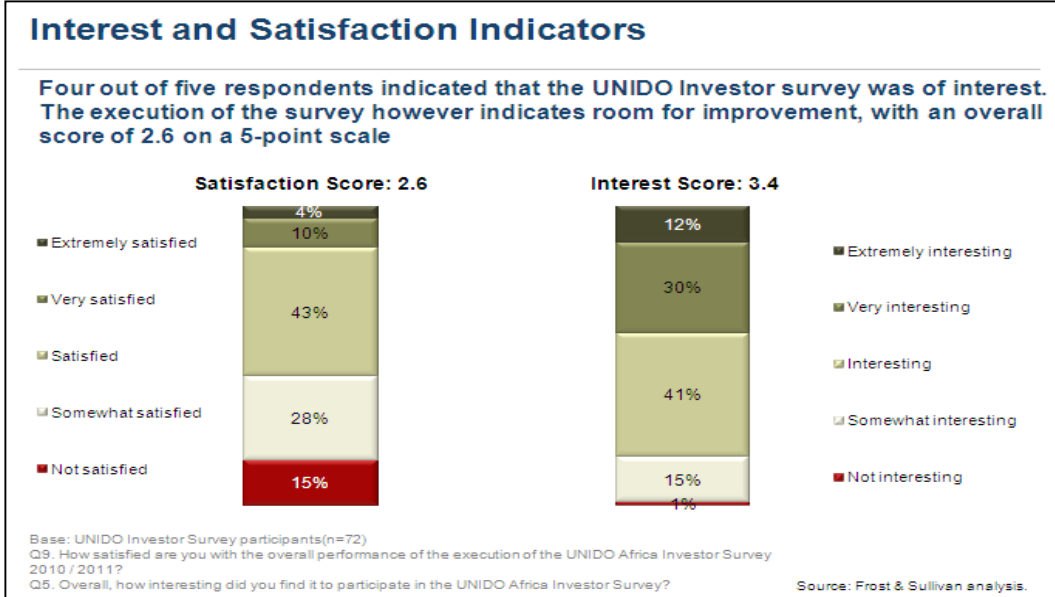


Source: Frost & Sullivan

Relevance to target companies/enterprises

For four out of five respondents from industry, the UNIDO initiative is of interest and relevant, enabling them to analyse their own business performance and to benchmark themselves against peers.

Figure 5: Interest and Satisfaction Indicators



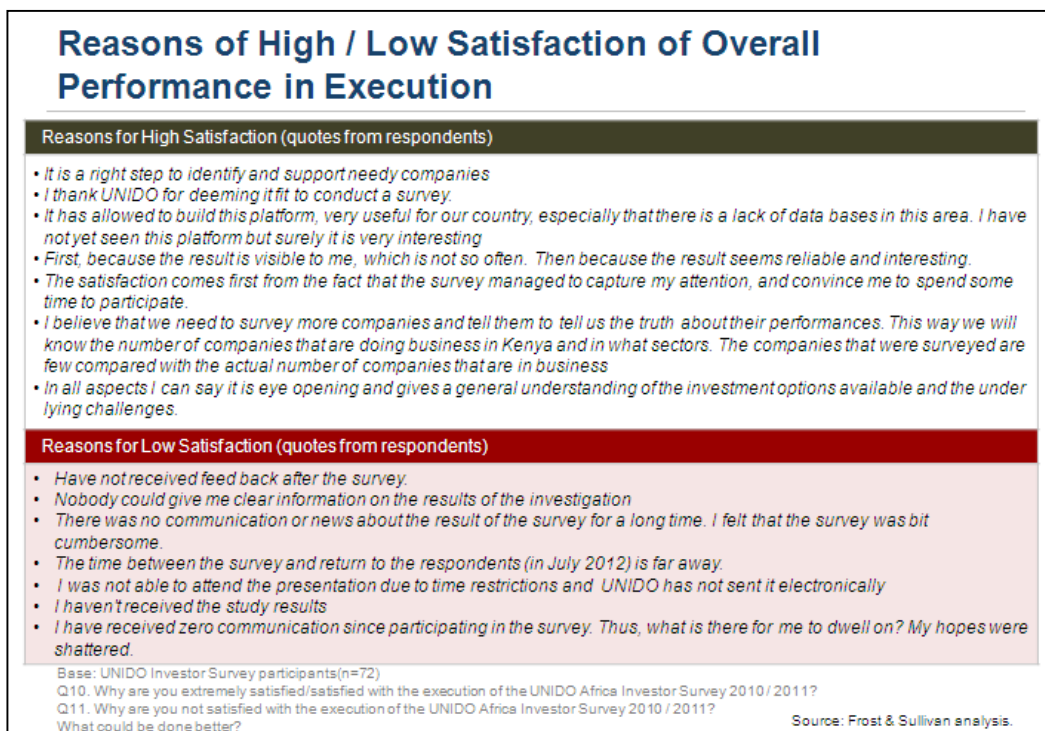
Source: Frost & Sullivan

Figure 6: Reasons for High / Low Interest in Participation



Source: Frost & Sullivan

Figure 7: Reasons for High / Low Satisfaction of Overall Performance in Execution



Source: Frost & Sullivan

Another indicator of relevance is the compilation of the business directory. In order to conduct the survey, the project implementation team needed to set up a clear sampling frame to identify and target several thousand businesses across the 19 countries as part of the BNet Business directory Programme, to include Small & Medium Size Enterprises (SMEs) and large corporations, domestic and foreign. The challenges that came with this exercise will be analysed later in this evaluation, but its relevance in view of selecting target companies is however acknowledged by the evaluation team in this section.

Only by creating this clear sampling frame from scratch was it possible for the UNIDO team to ensure that not only the project design but also its execution would take into consideration development needs of all relevant large, medium, small and micro companies/enterprises within a country.

The evaluation concludes that this would not have been possible without the compilation of the business directory, which listed a significant number of companies to whom the survey is relevant, and that were relevant to the survey.

Stakeholder involvement and ownership

Whilst several stakeholders and associations were consulted as part of the project implementation process, the evaluators received feedback from selected stakeholders that more involvement in the project initiation stages would have been desirable and could have led to a higher sense of project ownership. For example, it was perceived that many stages of the questionnaire development, survey operations and sampling methods, and technical analysis had been decided and agreed prior to the involvement of country stakeholders, or external academic/research advisors.

For example, in Ghana, IPA said: *“the Centre was made aware of the project from its inception but got more involved in it during the piloting of the project in December 2011. When they got involved the project was at its final stage. At the time of involvement, the project was being piloted and therefore the Centre could not make an input into the design and approach of it”*.

According to the Ministry of Industrialization (MOI) in Kenya, project implementation was good, especially bearing in mind the fact that a major challenge was the number of project stakeholders involved, each with a different agenda and interests. *“There were heavy politics involved around the implementation, which to our opinion contributed considerably to its delay. The Bureau of Statistics slowed down the process because they wanted to be far more involved in data capturing and data ownership”*. As with the MOI, there was no collaboration with the National Bureau of Statistics, since it seems that they had an issue with the fact that UNIDO would ‘control’ the data. *“The KBStats said it was within their mandate to control all information that is collected in Kenya”*. A similar feedback regarding delays in the project was provided by KIA who stated that *“the debate between UNIDO and KBStats was an issue, and the Bureau pulled out because they wanted to control and manage the data”*.

Whilst this may have been an issue in the project identification and planning stage previously, this challenge will potentially be removed for the next round of surveys, as – according to the project team - relevant organizations have already been contacted, made aware of the next survey and asked to contribute. Apparently the data ownership issue and its negative consequences have been taken on board as important lesson learned - and it has also been clearly communicated to local stakeholders that *“the data is not owned by UNIDO and countries can have full access to the raw database. Nobody is supposed to own this data, it is a public good presented in public data format. It is a cross country analysis and UNIDO is just a third party custodian.”*

It was also acknowledged by the project implementation team and several National Associations that numerous other surveys were being undertaken in Africa in relation to investment at the same time the UNIDO survey went to field and that consequently survey fatigue amongst respondents has been an issue.

It was suggested by different National Associations that running several surveys simultaneously could have contributed to a number of private sector companies refusing to participate, a smaller sample size than desired and potentially less accurate survey responses (it should be noted here that the latter concern was raised by the Tanzania NBS, which – similar to the Kenya NBS – did stand out for its lack of collaboration during the entire project duration).

The Bank of Uganda (BoU) considered combining the UNIDO survey with other ongoing surveys but decided against it. *“The datasets were too different, so we decided to run the surveys independently and not to combine the task”*. A similar feedback was provided by the Uganda Investment Agency: *“we think that the survey should be kept separate from other surveys. Each of them services different investment needs and should not be clubbed, risking a drop in quality of the gathered data. We have been running investor surveys for years (since 2002), but the UNIDO project provided a broader, much more useful inter-country perspective”*.

In contrast, the Uganda Bureau of Statistics feels that the UNIDO survey should be combined with their surveys, potentially improving implementation and reducing survey fatigue. UNIDO would however need to fit their survey into the UBOS annual survey calendar and include UBOS data. *“We feel that the UNIDO project is a good start, but there is survey overlap between UNIDO and UBOS surveys, which is clearly causing survey fatigue. There should be more collaboration between all project stakeholders, there needs to be synergy”*.

Suggested surveys, brought to the attention of the evaluation team by interview respondents and that could have been leveraged/integrated as part of the Africa Investor Survey & IMP could be/have been the following:

- The Investor Survey carried out by the Tanzania National Bureau of Statistics;
- The International Monetary Fund (IMF) survey in relation to Balance of Payments and Foreign Direct Investment (FDI);
- World Bank Surveys;
- The Census of Industrial Production (CIP) 2010 - Kenya National Bureau of Statistics, in conjunction with the Ministry of Industrialization, conducted the Census of Industrial Production (CIP) of establishments in Kenya. The census exercise commenced in November 2010 to December 2010 the same time the UNIDO survey was being conducted. Their questionnaires were sent a month earlier;
- KBStats – Kenya.

Relevance analysis of the Africa Investor Report

UNIDO's focus on Investment Promotion Agencies (IPAs) is important and relevant, in order to facilitate the achievement of the two key objectives, namely to help African governments identify "quality" direct foreign investment (FDI) and to help allocate scarce public funds in a manner consistent with the most effective attraction of such FDI.

Chapter 2 presents a wealth of information on the characteristics of investment in the sub-Saharan economies included in the survey. A range of descriptive statistics is presented on both foreign and domestically owned enterprises, including data on year of establishment, origin and type of foreign investors, entry strategies and factors influencing choice of location. Measures of labour productivity and total factor productivity (TFP) are used to evaluate enterprise performance, and the impact of FDI on employment, wages and linkages is discussed. The export performance of enterprises is also discussed.

This is useful and relevant information and the Report is undoubtedly relevant as a tool for the introduction of empirical analysis to aid the better understanding of industrialization and the operations of industrial enterprises and improve policy towards the sector.

One objective of the Report is to enable the measurement of the impact of different categories of foreign investors on the domestic economy. This is a challenging objective given the complexity of the relationships between enterprises, and between enterprises and the macro economy involved. Some economists may argue that the only way to identify and trace such relationships is through case studies of countries, sectors and subsectors or enterprises, rather than through the use of cross country regression analysis. On the other hand, case studies would require a different methodological approach altogether and given that the project collects data of cross-sectional nature; the cross-country regression analysis seems a valid methodology.

A further challenge is the paucity of available data and therefore the difficulty of assessing the objective of changed investment regime and government policy on enterprise performance and investment decisions. Presumed relationships can be hypothesised, and the attempt made to test them only when data become available. If the survey is to be continued and expanded, it is expected that a time series can be built up. As of now, this analysis is lacking from the report. Still, it is fair to state that the Report provides valuable insights as to quality investments and FDI that will support IPAs in their decision making process.

The Report should be relevant for the enhancement of the policy advocacy role of national institutions. Chapter 4 of the Report is of relevance in this respect, although certain parts of the analysis would require a more detailed approach

and more concrete analysis to support the enhancement of the policy advocacy role.

It can be argued that the Report's design and approach are relevant to the improvement of investment services provided, which in turn could lead to consensus building and facilitation among intermediary organizations and between the latter and private sector organizations. But the way certain core issues covered by the Report are presented (especially in chapter 3) does at times not facilitate the achievement of these objectives: chapter 3 presents the regression results using the high-tech, medium-tech, low-tech division as well as a 12 sub-sector division of the manufacturing sector. Coefficients are presented at three levels: all, technology (low, medium and high) and sectoral (for those sectors with sufficient amount of data for analysis). Collection of data at finer disaggregation levels should be taken into consideration for the next Report to provide additional depth to the analysis. It is also important to note that UNIDO is now providing raw data to researchers in Africa to stimulate analysis and further research, which is likely to support the relevance of the Report to its beneficiaries.

5.2 Efficiency of Implementation

Managerial work

It was recognised across the project implementation team and the IPAs that the role of the CTLs was crucial to the successful delivery of the surveys in their respective countries. There was however a significant variance in the effectiveness of the CTLs by country. For example, the CTL was changed four times in Kenya and three times in Tanzania, whereas in Ghana, the CTL support was in line with project management requirements. The lack of accountability of the Kenya UNIDO Office has been pointed out by one of the respondents: *“we feel that the local office should have been more accountable for the project implementation and delivery. Dealing with Vienna was at times tricky and being able to hold a local office accountable would have been more straightforward– a local officer would have had a better feel for what was happening on the ground and this is difficult to handle with Vienna. When the Vienna team was here, the project was doing well – once they left things are not always that rosy...”*

The requirements stated that CTLs should be independent and not linked to a business association; their performance was reviewed after one to two months (depending on country) and either retained or released depending on performance. Based on the fact that there have been serious issues with the performance of several CTL, this was the right choice.

It could be argued of course that the issues that the UNIDO project team faced with several country team leaders (and sub-contractors), could have been mitigated by giving this role to an internal UNIDO staff member, to be sent on

mission in the respective country. This had to be done with Tanzania, where the third country team leader was a UNIDO member from the Vienna office. This, however, needs to be evaluated against the necessity of local capacity building and ultimately against the objective of the project's sustainability; an assessment that also needs to be taken on a country by country basis.

With regards to the efficiency of manuals and training to enumerators, it has been established that several training manuals and guides were prepared, demonstrated, and provided to survey enumerators. The training material was of high quality and deemed particularly useful by the evaluation team; the project implementation team and IPAs also noted that the material itself was more than adequate. However, the only concern was that several enumerators had to be recruited mid-way through the survey programme. It was noted by the Implementation team that when this occurred, quite often training would be delivered "on the job" for practical reasons rather than to run plenary sessions/pilots before deployment.

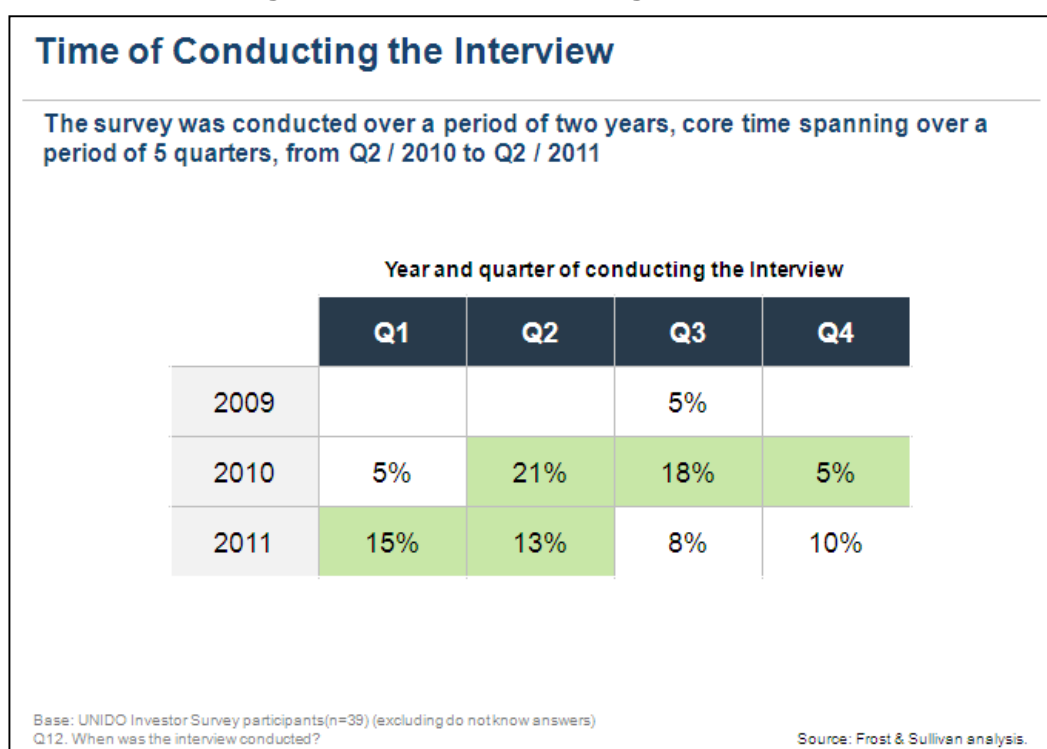
In fact, mainly due to delays in commencing fieldwork (training started in 2009, but fieldwork did not commence until a year later), several enumerators left the programme throughout the process, or even before undertaking any interviews, which led to many (replacement) enumerators being trained on the job, or remotely (via conference calls and Skype) rather than via a formal training session and support prior to fieldwork. One respondent mentioned that the training of replacement enumerators at times felt like a *"hit and run affair"*.

This certainly had an effect on both the length of the interview and the necessity of performing even more thorough manual checks of the logged questionnaires. It was raised by the implementation team that, as a result, the first batch of enumerators were considered more effective than in the later stages of the surveys, which could be attributed to both the level of training and interviews undertaken comparatively. This also points to a lack of adequate investment in ensuring that the enumerators were properly trained throughout the survey period.

Similar feedback comes from Ghana, as noted by the CTL: *"in August 2009, after we had gathered stakeholder groups, completed the training and everything as per plan, it transpired that the UNIDO budget was not aligned with the company responsible for the completion of the research so the project had to be put on hold...You see, the Institute for Statistical, Social and Economic Research – ISSER - (part of University of Ghana) were responsible for the research. And they are run like a private business – their original cost was higher than the available UNIDO budget. In the end ISSER lowered their costs in alignment with the available budget. So finally in November 2009 we prepared and finalised the proposal for approval. And in March 2010 the final contract got approved – but due to this delay contractors that were originally ready had now found other employment so the training had to be run again..."*

In terms of the timescale of fieldwork, respondents suggested the survey was executed the year 2010 and 2011, with the main execution period spanning from the beginning of Quarter 2, 2010 to the end of Quarter 3, 2011, over a period of 15 months. Such a long survey period leads to the data being difficult to compare, which is of particular importance, as the UNIDO Africa Investor Survey includes many profiling questions (investment levels in the previous year, for example). As mentioned, it has also been suggested that the timescale of the fieldwork might have contributed to several enumerators leaving the Programme, and therefore creating the necessity to recruit and train new enumerators.

Figure 8: Time of Conducting the Interview

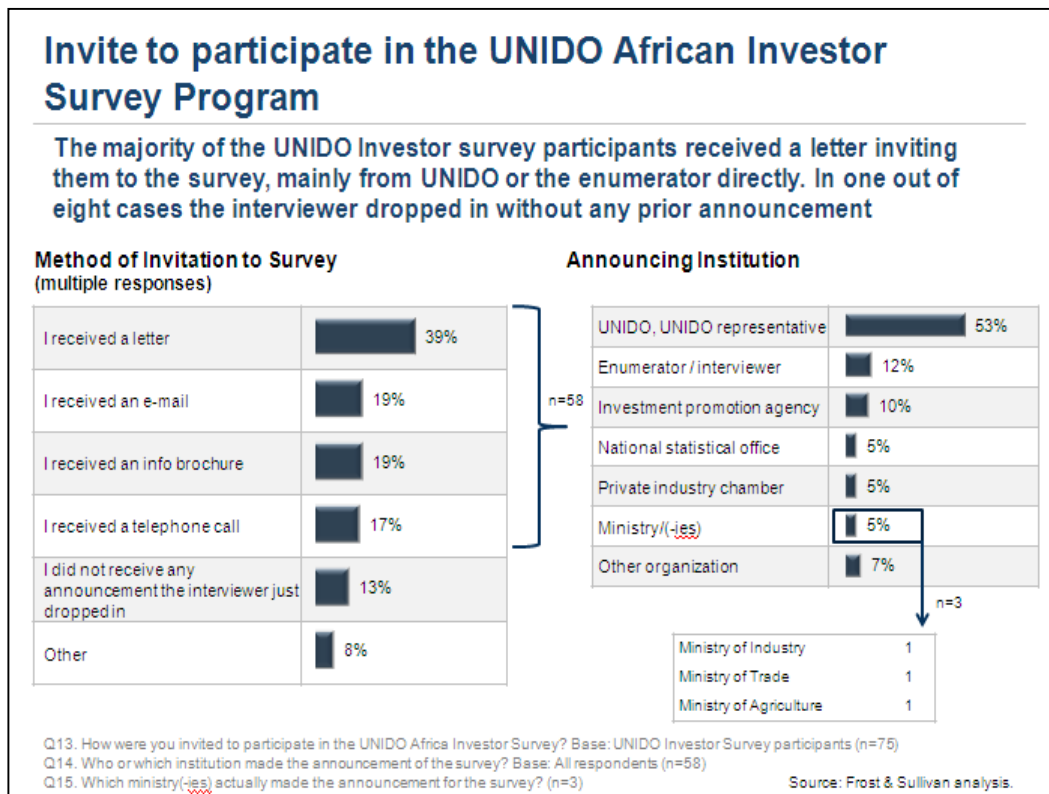


Source: Frost & Sullivan

In terms of the invitation to participate in the survey, the majority (83 per cent) of participants received an invitation in advance, by letter, e-mail, brochure, or telephone call. Still, one in eight (13 per cent), did not receive any announcement of the survey, but claim that the enumerator/interviewer just turned up.

The invitation was made in 65 per cent of the cases by a UNIDO representative, or the enumerator/interviewer, and in 25 per cent of cases, by country bodies such as the Investment Promotion Agency, National Statistical Office, or Private Industry Chamber or Ministries.

Figure 9: Invite to Participate in the UNIDO African Investor Survey Programme

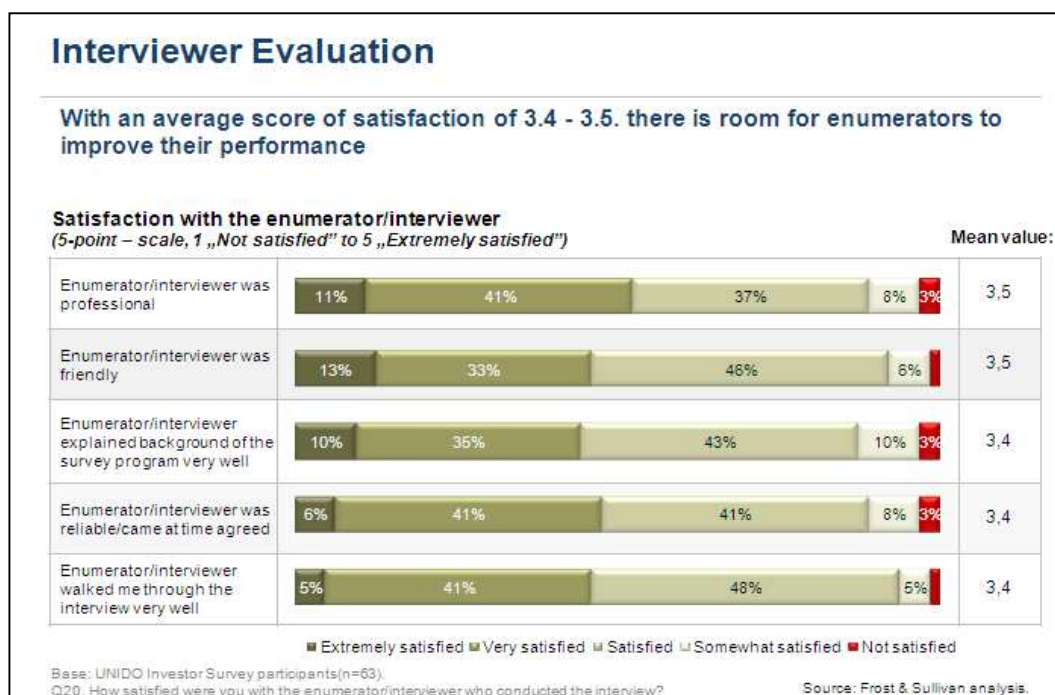


Source: Frost & Sullivan

The evaluation’s online survey also focussed on the perceived performance of the enumerator/interviewer throughout the survey process. This has resulted in average scores between 3.4 and 3.5 on a 5 point basis. The evaluation team were of the view that these values indicate some room for improvement, particularly on the areas of professionalism and friendliness, and turning up on time. The below graph shows that, in fact, 11 per cent of respondents felt dissatisfied or only somewhat satisfied with the professionalism, with 8 per cent when considering friendliness, and 11 per cent turning up on time.

Furthermore, 13 per cent of respondents were dissatisfied or somewhat satisfied with how the enumerators explained the background to surveys, thus it is concluded that there is room for improvement on training the enumerators on the project background and objectives. However, the comparative score was lower (7 per cent) in relation to the enumerators walking the respondents through the interview well, which is positive, as it shows that 93 per cent of respondents were satisfied, very satisfied, or extremely satisfied with being walked through the interview.

Figure 10: Interviewer Evaluation



Source: Frost & Sullivan

Resource utilisation

All but two of the countries in the survey used sub-contractors to assist with recruitment of enumerators and/or CTLs. This was deemed the most efficient solution due to local knowledge and resources. However, the operational success of this was vastly different across the countries. For example, where the sub-contractor was the University of Kenyatta (Kenya), this worked particularly well, and a number of students were used as the enumerators and it is expected that this collaboration will be drawn upon for the project continuation, too. In Nigeria, conversely, this did not work efficiently, with enumerators not paid on a few occasions, which escalated to complaints being made to UNIDO HQ (despite this being the responsibility of the Nigerian NSO in that instance).

It was also raised that some of the enumerator supervisors from sub-contracting firms were very effective at project initiation, but their presence on survey sites and interviews reduced as the project went on, which could have had an impact on enumerator performance, guidance, and morale. This led in many cases to additional responsibility being placed on the country team leaders to undertake quality checks, which should have been delivered by the sub-contracted supervisors.

A factor that in Kenya had a negative impact on the timely completion of the project was the fact that the project was (even if at project initiation) physically

moved from the Kenya Industrial & Research Development Institute (KIRDI) to the Kenya Investment Authority offices. At the same time, a new MD started at KenInvest *“who did not know much about the project and this slowed down things a bit, too”* and the fact that *“companies were naturally suspicious due to the sensitive nature of the questions and this – apart from the questionnaire being very long and elaborate – impacted implementation”*.

Although moving the project to the Kenya Investment Authority (KIA) might have bought a delay in terms of time during project implementation, it was the right decision from an implementation quality point of view. KIA collaborated very closely with the Kenyatta University (who was selected as sub-contractor to provide enumerators) that provided highly motivated enumerators working from the KIA premises that functioned as the call centre and data entry port.

However, as Kenyatta University pointed out, this was a considerable distance away, and an improved remote access system would have aided the delivery of the survey review process; *“the supervisors had challenges because they had to come to the call centre to approve the questionnaires. The call centre was located twenty five kilometres from Kenyatta University. Travelling to the call centre and back to their work stations presented a major challenge. In future an attempt would be made to install the software used for downloading and uploading questionnaires in the supervisors’ laptops so that they can review the questionnaires even in their offices before approving them”*.

Extent of national and UNIDO support

The evaluations team found that the national support given to the project was overall very good, with much positive feedback in relation to the objectives and quality of the survey and (although not always completely satisfying in the planning phase) positive indications of collaboration with national stakeholders.

The Bank of Uganda (BoU) feels that the project implementation was handled well, and – although not directly involved in the implementation itself – the BoU apparently provided both inputs into the project process and during several project update meetings. *“We were a key stakeholder, involved since 2008 and monitored the whole process”*.

UNIDO did collaborate with the Uganda Investment Authority, who felt that the project was well implemented, although access to the gathered information by local organization is unfortunately limited. *“It is limited but we perfectly understand the reason for limiting local access to data...”* Some of the implementation challenges mentioned by the Authority were the (initial) small sample size, which however was increased from 500 to 800 and the questionnaire administration. *“Locating some companies was difficult and getting the questionnaires back was even more challenging”*.

However, there were also some instances where a lack of collaboration of selected local stakeholders/local organizations might have been a further contributing factor to the delay in project consignment. Although it seems that the project team has tried to involve local organizations such as NSOs, in certain countries such as Kenya and Tanzania this has proven challenging. Respondents do appreciate the difficulties faced by UNIDO in seeking local collaboration, but at the same time suggest that for a next phase more time and effort could be spent ahead of project initiation *“to ensure a potentially higher buy in from local organizations and their agendas”*.

As noted by a respondent *“project stakeholders should be contacted even before project initiation and that their feedback is obtained even before the project actually commences. These project expectations should be built into the project from the start so that stakeholders’ expectations are met. For example: include specific data points that local IPAs would like to see in the project output – this will considerably enrich the process”*.

Although extremely positive about the outcome of the survey, a similar point of improvement was mentioned by respondents from Uganda, who suggested that *“during implementation it is crucial to get Investment Agencies on board; more collaboration with local stakeholder organizations is required”*.

It seems however that UNIDO did seek the collaboration of the Uganda Bureau of Statistics, who initially was involved in the survey but then *“pulled out because of data confidentiality issues. We were not certain that all data would be kept confidential and this is a major issue for us. UBOS has the confidence of the companies they regularly survey and we were not willing to risk this trust so simply pulled out of the project”*.

On a more positive note, the fact that collaboration from national associations/stakeholders varies considerably from country to country is shown in Ghana, where the collaboration from the Ghana IPA was very strong:

“We provided UNIDO with all the data we had on foreign companies operating in Ghana who had to be contacted for the survey. We provided secretarial assistance and other logistical assistance to the researchers who were doing the survey and we provided an office for the UNIDO team to serve as the main office for the researchers in Ghana. We also provided Officers to assist researchers where needed”

Efficiency Analysis of the Africa Investor Report

The Report (p.29) states that *“With detailed, comprehensive analysis, IPAs and other intermediary organizations can be better able to promote investment, influence government policies, maximize the impact of resources at their disposal*

and achieve consensus among national stakeholders for a common investment promotion strategy with flexibility to adjust to emerging trends and challenges”.

This is a credible statement of intent that nevertheless needs to be read in the light of challenges such as the likelihood of conflicts of interest between different national institutions (Ministries of Finance, Planning, Infrastructure, Development, The Central Bank, etc.) and the ability to make rational decisions free of special interests. At times the quality of the inputs and analysis do not meet the standards required to meet the above stated objectives fully.

The presentation of the survey results in chapters 2 and 4 are of a quality required for the intended purposes of the project and should lead to an improvement in investment services. The data is however more limited at the sub-sectoral level and does not always permit detailed analysis. There is no regional dimension to data presentation and no enterprise level analysis.

5.3 Effectiveness of Project Results

Introduction

The project document provides a detailed description of the project outputs and related activities, which are also reflected in the project LogFrame annexed to the Project Document. It should be noted that such a level of detail is not provided for the Project Outcomes, which are stated in the project document (part 1, page 5) but not reflected in the LogFrame.

Nevertheless, and based on the feedback received by local associations and enterprises, it can be stated that the implementation team activities and outputs, including the Investor Report and the IMP lead already to 3 of a total of 6 project outcomes, namely: 1) improvement of investment services provided to the private sector; 2) increased availability of sub-sector level information for investment decision-making; and 3) stimulation of research for the analysis and interpretation of survey information.

With regards to the remaining 3 outcomes – 4) enhancement of the policy advocacy role of national institutions and private sector organizations; 5) improvements in the investment climate through reform programmes; and 6) the design of targeted investment promotion strategies as well as the facilitation of consensus building – it will be possible to assess their achievement only following a longer period of dissemination of the project outputs and, most importantly, following public statements of intent and support to the programme by local Ministers and RECs.

Table 6: Status of Outputs

project outputs		Success indicators (per Logframe)	Status (as of July 2012)
1	Project teams and national capacities for data maintenance and updating.	<ul style="list-style-type: none"> • One Country team leader and on average two project consultants recruited. • ICs in each of the 20 countries established. • One seminar and technical workshops in each country on survey methodology. 	Achieved, though capacity building was largely indirect.
2	Sensitization.	<ul style="list-style-type: none"> • Number of stakeholder groups included in sensitization campaigns and their levels of involvement. • Numbers of champions mobilized. • Number of action plans for sensitization campaigns customized for different stakeholder groups. • Number of channels used for promotional activities. • Numbers of companies reached. • Numbers of company testimonials. 	Less than optimal levels of sensitization with some counterparts (NSOs), and inadequate public advocacy prior to launch of surveys.
3	Compilation of business directory and sampling frame.	<ul style="list-style-type: none"> • Number of data source identified related with company profiles. • Completeness of data gathered. • Number of companies reached from secondary sources. • Number of profiles corrected. • Number of companies self-registered to business directory. 	Achieved.
4	Data collection and quality check.	<ul style="list-style-type: none"> • Database on foreign and domestic investors established within 6 months after start of survey and covering 20 SSA countries. • The missing values in the questionnaire at most 30% for generic items. • The missing values at most 10% for core items. • Master sampling plan fulfilled. 	Achieved, with a ~64% success rate (6,400 companies out of a target of 10,000; in 19 countries out of 20).
5	Finalization of Survey Report.	<ul style="list-style-type: none"> • Pre-defined research issues were successfully analyzed. 	Achieved.
6	Survey Report Dissemination at the country-level.	<ul style="list-style-type: none"> • Report launch in a large conference with participation of representatives of the 2-3 principal country stakeholders, international stakeholders, regional economic communities (RECs) and donors. • 20 country meetings with presentation of country specific survey results to national institutions and participating companies. 	Ongoing.

Source: Frost & Sullivan

The following analysis will assess to what extent outputs (as described in the project document and the Project Logframe and listed as follows) have been produced and outcomes achieved.

Outputs 1 - 4 - Establishment of Country Teams, Sensitisation, Compilation of Business Directory, and Data Quality Checks

The establishment and training of country teams on survey methodology and project activities has been achieved per the Project Logframe. As discussed earlier, this process was at times challenging and lengthy (due to changes of CTLs in selected countries), but very much geared toward ensuring national capacities are built up for data maintenance and updating. CTL and enumerators were selected amongst others from national associations and universities, which not only is in the sense of stimulating analysis and interpretation of survey information (especially at university level where some of the data was used for the development of theses) but also indirectly works towards a dialogue between local associations and organizations (asked to implement the project) and private sector operators (asked to cooperate with the project).

In terms of sensitisation, feedback from respondents has been mixed, not necessarily in terms of country level differences, but in terms of stakeholder feedback within the same country. In Uganda both the Bank of Uganda and the Uganda Investment Authority gave very positive feedback in terms of the project team organising meetings and encouraging them to participate in sensitization initiatives, whereas the Uganda and Kenya Bureau of Statistics – for example - suggested that they would have desired a higher level of sensitisation and involvement of local stakeholders, to include IPAs. In Ghana, on the other hand, the collaboration with the IPA right from project initiation was very strong. The evaluation therefore concludes that the sensitization and its related activities as per project document has been accomplished to a certain extent but would need a stronger focus and efforts in view of the next survey, especially in view of the enhancement of the policy advocacy role of national institutions.

One of the strongest and most successful outputs of the project has been the compilation of business directory and sampling frame. Although one of the most challenging tasks of the project, it is also one of the most relevant results accomplished by the implementation team in view of meeting outputs and objectives as detailed in the project document.

The process of establishing the business directory for each of the 19 countries has been the main challenge in implementation and the key cause of overall project delay. In order to create a clean and relevant sampling frame, each of the NSOs in the countries was contacted to ensure consistency with the current sampling methods in that particular country. Challenges with this approach were realised very early on in the programme. Some NSOs (and indeed IPAs)

regarded such a programme as their responsibility (not UNIDO's) and were rather reluctant towards contributing as a result, and simply did not provide the required sampling frame.

Secondly, some NSOs (e.g. Kenya) were willing to contribute, but only if UNIDO made them the sub-contractor for undertaking the interviews, which at the time was not deemed as the best solution since the availability of the NSO enumerators during the survey period could not be confirmed unless UNIDO agreed to postpone their fieldwork. Since the project was already delayed, and in order to avoid further delays, the project implementation team decided to collaborate with the Kenyatta University. The implementation team has however pointed out, that for the next survey it expects to seek support from the NSO again and that hopefully on both ends there will be more flexibility in fieldwork timing on both ends.

Lastly, where the sampling methods were provided, the quality was particularly poor from a starting point; for example, in Tanzania data included companies that ceased to exist in 1990. In addition, in Kenya, 90 per cent of the telephone numbers suggested by the scheduling tool were inaccurate, leading to searching phone books and manufacturers' directories, all adding significant time to the process. As reported by the Kenyatta University,

“Most of the telephone numbers indicated against the companies in the scheduling tool were not correct. The companies had either changed their telephone numbers or changed their names. The data base for the companies in KenInvest and Kenya Association of Manufacturers was also not very accurate because the Kenya Post and Telecommunication had changed some telephone numbers after the data was compiled. Some companies in the scheduling tool had ceased to exist.” Similar feedback comes from all surveyed countries, with Ghana respondents confirming that *“the database information was of poor quality – a real project challenge. We had to spend a lot of time contacting companies and verifying the available information. This really took a lot of time...”*

One of the biggest challenges – to the opinion of TCCIA (Tanzania Chamber of Commerce, Industry & Agriculture) – was the difficulty in identifying companies and to encourage them to contribute information to the project. When asked if this could have been overcome, the feedback was *“No, I do not think that this challenge could have been avoided a priori, but the fact that towards the end of the project a CT (Country Team Leader) from Vienna was sent in was a very good solution.”*

All of the above left UNIDO with some tough choices, which mainly revolved around either collecting the data themselves, to employ NSOs for more of the programme than was originally planned, or to assist the NSOs in updating their sampling method and indeed business data collection. In reality, a combination of these elements was deployed, by merging a number of datasets and information,

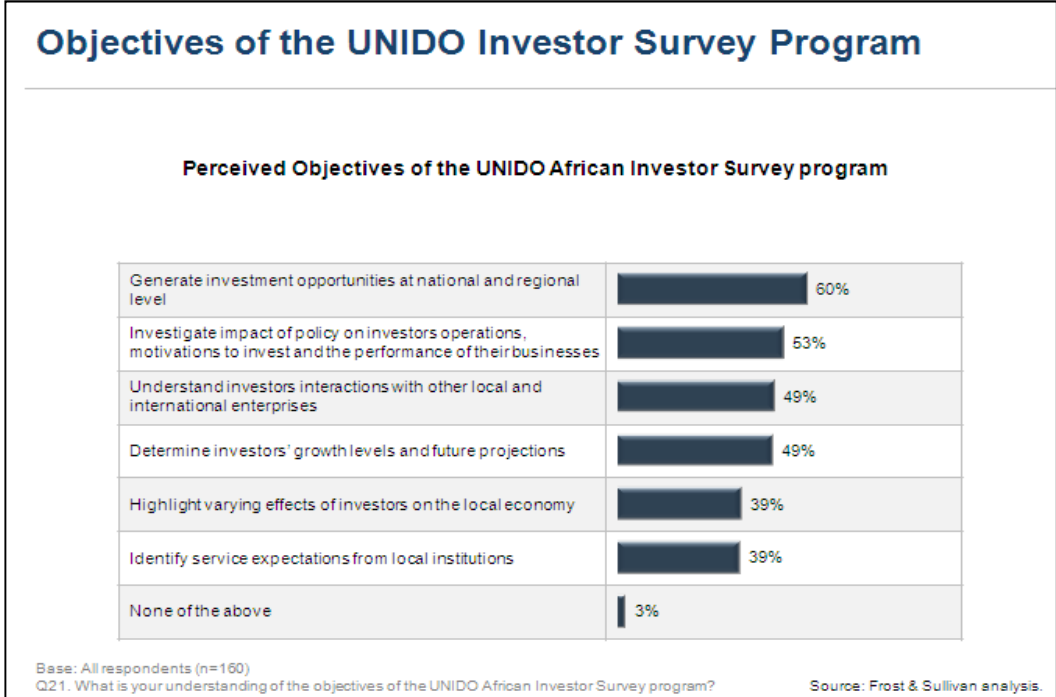
as a result of contacting NSOs, IPAs, universities and other local institutions, to obtain their lists.

The CTLs in particular would then validate this with the support of UNIDO, and even then it was discovered much of the data (contact details) were incorrect; in extreme cases this resulted in some CTLs physically driving to certain company addresses to check if they still existed, noting down details manually on site to update the address/contact details.

Whilst this was labour intensive and difficult at the time - and caused the Africa Investor Surveys to overrun by an estimated 12 months - it is widely regarded (by the project implementation team, external advisors, and the IPAs) now a key selling point of the project overall, delivering IPAs with invaluable capacity building tools.

As part of the evaluation, the survey respondents were asked of their understanding of the Africa Investor Survey objectives. Of those that answered this question (160), the majority (60 per cent) felt that this was to “generate investment opportunities at national and regional level”. This was followed by investigating the impact of policy, and understanding interaction with other enterprises. Therefore, whilst there were some challenges with the sampling of companies, this further supports the conclusion that the Africa Investor Surveys objectives were clearly understood by the business community.

Figure 11: Objectives of the UNIDO Investor Survey Programme

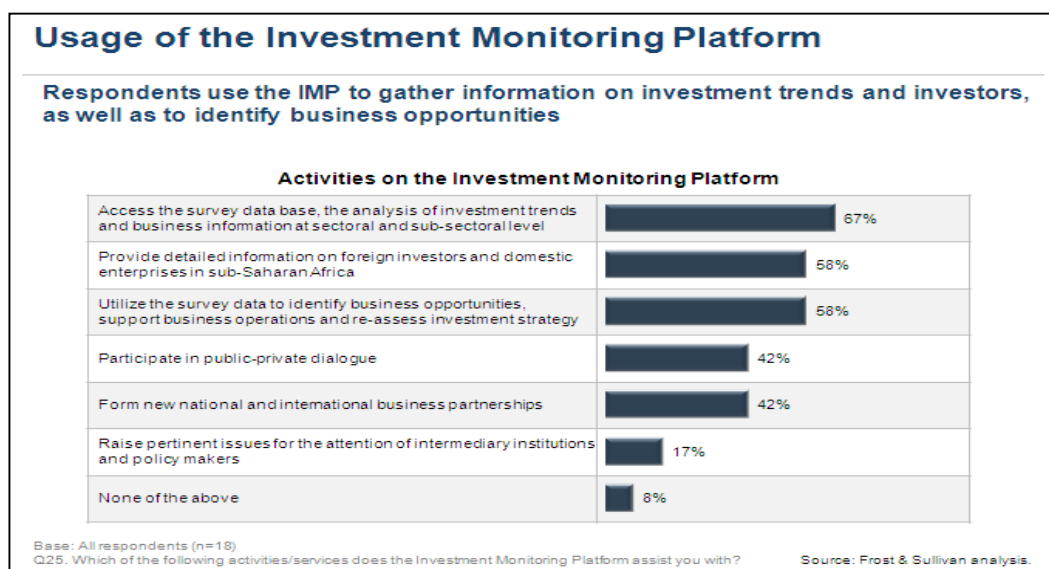


Source: Frost & Sullivan

Development of the Investment Monitoring Platform (IMP): Although not listed amongst the objectives within the Project Document, the development of the Investment Monitoring Platform has to be considered as a key – even if unforeseen - result of this project. Aimed at making the aggregated survey data available to a large and diverse audience the IMP is a strong support tool to the survey report on IPA capacity building. The platform allows potential users to independently carry out research using data available on the platform and to generate user specific reports. As such it strongly supports the improvement of investment services provided to the private sector, increases the availability of sub-sector level information for investment decision-making and strongly stimulates the research for the analysis and interpretation of survey information. Together with the Investor Report, the IMP progresses towards meeting the overall project objectives, allowing IPAs and other local associations to support investors in their decision making and to maximise in the medium to long term the impact of foreign and domestic investment on sustainable growth.

Similar to the ‘Africa Investor Report’ the IMP has only been launched recently, and at the time of the evaluation dissemination work was still under way. Nevertheless, amongst respondents who have had the opportunity of attending launch events and trainings, the feedback on the benefits - in terms of access to investment related information – provided by the IMP has been very positive. Suggestions of improvement mainly relate to the request of the platform covering more countries, segments and industries (similar to the report) and to the necessity of more training in order to efficiently use the IMP. The usefulness of the IMP and the reliability of its data was however never questioned, with challenges highlighted pointing more into the direction of a strong desire to use the tool at its best potential. Some of the feedback gained through the research conducted by the evaluation team is summarised as following. The table below shows the key findings on IMP usage by private enterprises.

Figure 12: Usage of Investment Monitoring Platform



Source: Frost & Sullivan

Output 5 - Effectiveness of the Africa Investor Report

As mentioned above, the Investor Report has contributed to the realisation of three project outcomes. Much of the Report meets the objectives as stated in the project document and its analysis and conclusions will be relevant to the sample countries.

The Report will certainly assist countries in assessing their needs and evaluating the effectiveness of their own IPAs. The data and analysis presented in chapters 2 and 4 are more than adequate for these purposes and the Report as a whole increases our understanding of the impact of different categories of foreign investment on the domestic economy and their comparison with domestically owned enterprises.

It is not clear, however, how the Report will effectively help assess changes in the investment climate and their effect on performance and investment decisions. Although this is a desirable objective from the perspective of policy makers, its achievement either requires more data than is currently available or a very sophisticated modelling exercise with all their attendant limitations and degrees of abstraction that might limit their usefulness to policy formulation.

The Report's findings should stimulate further research in the areas covered, and could be effective in informing the dialogue between government institutions, the private sector, civil society and other development partners. It is less clear that it will help to build consensus among the multiplicity of actors (given the potential conflict of interests among them).

Chapter 4 of the Report contains a great deal of useful information on the services provided and investor's perceptions of the effectiveness of the services provided by IPAs and the relative importance of various types of business support services. It concludes that future business support services from IPAs should focus on key areas of "matchmaking between local and foreign firms, joint venture facilitation, technology promotion and enterprise upgrading. IPAs need to bolster their service offerings with modalities to improve enterprise access to finance, assistance in technology sourcing and management support, as well as export promotion services" (p.174). These are all very relevant objectives,

For the remaining outcomes to be delivered (namely, enhancement of the policy advocacy role of national institutions and private sector organizations; improvements in the investment climate through reform programmes and the design of targeted investment promotion strategies, as well as the facilitation of consensus building), a number of issues need to be addressed, as the Report's relevance and usefulness are weakened by the analytical techniques chosen and the manner in which the data is presented. Non-specialists will find parts of the Report difficult to access. Moreover, the Report does not effectively present data at the sub-sector level.

The design and structure of the Report and the presentation and analysis of the data in chapter 3 in particular make it very likely that the Report will only be fully accessible to economists with a good understanding of quantitative analysis. Although there are several footnotes and text sections that urge the reader to be careful when interpreting the data, the danger with the presentation of regression results in this manner is that they may still be misinterpreted and their limitations not appreciated.

The Report does not provide direct empirical evidence on the economic benefits of FDI. Chapter 3 takes the regression coefficients estimated for foreign and domestically owned firms and plots them against various performance indicators for both sub-sectors and so-called meta-sectors (classified by technology) for manufacturing as a whole. It is unlikely that non-specialists would be able to make effective use of such data and use it to evaluate alternative service and investment facility interventions. The Report is not likely to be effective in contributing to risk reduction for private investors. The improved performance of IPAs is important in this context, but again the presentation of the data in chapter 4 is not always intuitively obvious and straightforward.

Moreover, the Report does not explicitly address issues of regional trade policy and the problems of industrialization and industrial location within regional groupings. It may be the case; however, that some of the Report's findings will be utilized by intermediary organizations to begin to investigate enterprise behaviour and spill-over effects. Extensive data on trade and barriers to trade was collected in the survey but the Report does not take-up the analysis, leaving it up to users to research this through the IMP.

Although there seems to be no direct analysis of issues relating to cross-border investment promotion, regional trade policy and liberalization of regional trade, the survey questionnaire was designed with one of its objectives being to assess trade issues and assist RECs. In order to benefit from this data, RECs will however need to access the IMP, not the Report.

In principle the Report will complement other survey efforts, but more microeconomic and sub-sector data is required for the formulation of technical assistance programmes aimed at enterprise development.

Some of the feedback on the report provided by respondents who were familiar with the Report is as follows.

One agency that seems to be familiar with the Investor Report is the Uganda Investment Agency, which regards the sections for IPAs and investment promotion as particularly useful, providing a view that the IMP does not offer due to the fact that it is user generated. They commented; *"From an investment point of view it is rather interesting it can show us where to find new markets. For example: Nigeria clearly needs Uganda's powdered milk products"*.

According to respondents from Ghana; “the *IMP and report are useful tools to promote investments in Ghana, and it allows IPAs to measure their success*”. The Ghana CTL was apparently asked to provide inputs into the report ahead of publishing. According to him, the document “*offers a good insight into how well the Ghana Investment Centre is doing, providing robust data on investment in Ghana and insight for investment promotion. It shows investment trends.*”

None of the questionnaires used for the surveys (Foreign Manufacturing Questionnaire (annex 3a), the Foreign Service Questionnaire (annex 3b), the Domestic Manufacturing Questionnaire (annex 3c) and the Domestic Service Questionnaire (annex 3d) include a question on the gender or age composition of the labour force.

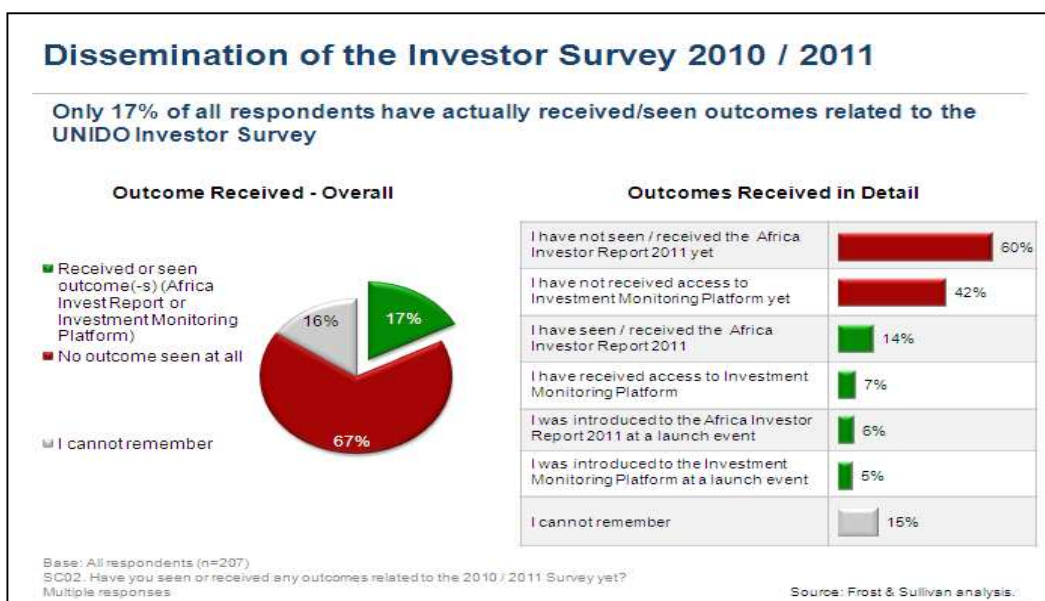
Output 6 - Dissemination of the Africa Investor Report

During the evaluation period, the dissemination of the report (and the IMP) was still underway. Although launched at several conferences, the results in form of the report and IMP had not been viewed by a larger audience.

The project implementation team reported that many launch events have been held and continue to be facilitated (especially at RECs level), and various media articles have been written. It was noted that paid advertising such as TV, publications and newspapers would have been desirable but very expensive, without necessarily delivering the objective of further involvement in the surveys. It was also reported by external project advisors that they have attended conferences and events regarding investment in Africa, and there was no mention from the speakers or audience about the IMP or Africa Investor Surveys. Whilst this could have been an isolated incident, it should be considered to increase participation at such events to ensure a global professional audience is reached.

Based on the findings of our online research with local enterprises, at the time of the evaluation, 67 per cent of those contacted from the first phase of surveys had not received any outcome from the Africa Investor Survey in which they participated. When reviewing this in more detail, 60 per cent had not seen the Africa Investor Report, and 42 per cent the IMP. The evaluation team are satisfied that efforts are underway to improve such dissemination, but consider that this engagement still needs effort and focus in order to be regarded as a satisfying project output. This will be particularly important to support sustainability in the long term, as people who have not seen the outputs are less likely to participate in future survey programmes.

Figure 13: Dissemination of the Investor Survey 2010 / 2011

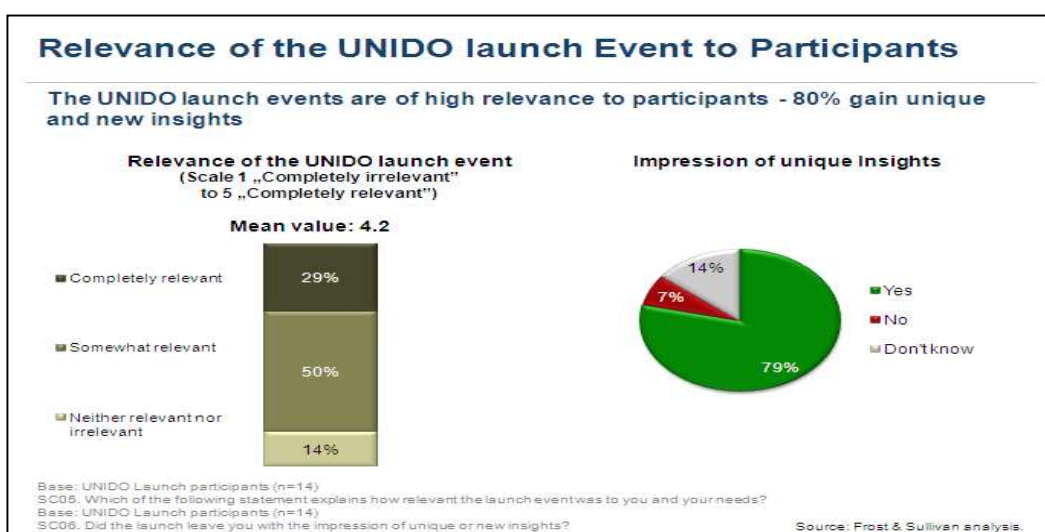


Source: Frost & Sullivan

The above analysis was again validated by our online survey, which found that just 16 respondents (7 per cent of our sample) had attended a launch event. Respondents mentioned 5 launch events in total; the two with the highest attendance number mentioned are the ones in Tanzania and Madagascar.

However, of the 16 that attended a launch event, the feedback obtained was very positive, with 79 per cent of respondents feeling it provided them with unique insights, as shown graphically below.

Figure 14: Relevance of the UNIDO Launch Event to Participants



Source: Frost & Sullivan

Overall, the dissemination of the report and the IMP needs continued focus. Currently the perceived benefits and awareness of the report and the IMP is patchy, and partially poor. For example, the feedback from the Uganda Bureau of Statistics: *“We have not used the IMP yet because we had access issues and do not feel confident that we can use it properly at this stage. We really cannot comment on data usage because we have not really seen the report or used the IMP so far. We have attended a training last week (end of August), but we have not used it to-date”.*

In addition, the Bank of Uganda commented; *“There has been a significant delay in the release of the project findings since the survey was done – as BoU (Bank of Uganda) we feel that this is a weakness. Information flow in Uganda is slow, so it is difficult for investors to identify opportunities and linkages in the economy. Investors require access to information as quickly and as accurately as possible”.* However, since making this comment, the BoU has recently started using the IMP, mainly to compare the data with other sources of information and to perform cross sector analysis.

Impact Assessment

While it is too early in the project cycle to make a full assessment of the project’s impact, there are already some positive indicators for impact. Several African organizations and local stakeholders have confirmed both the positive value of the data and the information that the Investor Survey Report and the IMP have brought to their work and are expected to bring to the economy. These include:

- Progeny International, a management consulting business that has been exposed to the IMP and the Africa Investor Report through training, has started using the IMP when advising clients on investment decisions in Kenya. One of the outputs used (and showed to the evaluation team) was a chart depicting marketing challenges faced by farmers in Kenya, with access to information being shown as one of the biggest marketing challenges. *“The IMP data allows us to back up and validate information for business plans, although we still use other sources – like data from the World Bank – to cross check and integrate.”*
- The Kenyan Investment Authority, Tanzania Chamber of Commerce, Industry & Agriculture (TCCIA), IPA Ghana and Ugandan Investment Authority all confirmed that they see the UNIDO work as a good guide for making and empowering right investment decisions, and attracting potential investors.
- The agencies above also provided feedback that the report and platform helps them make their local industry competitive and therefore provides inputs to the government and the industry to develop sustainable local industry.

More generally, it is clear that the investment climate in Africa has already changed for the better. With regular news of new sources of fuels, food and minerals being discovered and/or exploited on the continent, the upward trend in investments is set to continue for the foreseeable future. The question that remains, and one that the project seeks to address, is what type of investment is likely to have the desired impact on raising the standard of living for Africans in general.

According to the implementation team leader, the underlying economic assumption of the project is that enhanced productivity and greater employment generation - resulting from the type of quality investment that the project and the Report seek to promote - would be expected to lead indirectly to 'poverty reduction'. However, the impact of employment creation on poverty reduction will depend on various factors such as the number of jobs created (net) the actual wages paid (avoiding a 'race to the bottom'), and a multiplier effect on employment creation through backward and forward linkages with local enterprises in related industries/activities (both in the manufacturing and service sectors). Other potential positive effects for poverty reduction would flow from the education and training of labour, youth employment, gender sensitivity, technology transfer, infrastructure development, export promotion, and the resulting growth of productivity at enterprise level (longer-term effect).

Sustainability

Sustainability is dependent on several inter-related factors including national ownership and leadership, long-term resource availability, economic viability, and institutional, technical and human capacities. However, given the fact that the project was in mid-implementation stages at the time of the evaluation mission, the findings of this mid-term evaluation can only be treated as preliminary at this stage.

Some verbatim was provided on the project sustainability directly. For example, the Tanzania Chamber of Commerce feel that UNIDO would need to support the Africa Investor Surveys for 2-4 years further, and the Tanzania Investment Centre feel it is necessary for a further 3-5 years, otherwise they feel the project will not continue without this funding and support. Similarly, the Kenyan Ministry of Industrialisation pointed out that *the project is not sustainable in Kenya at the moment – if UNIDO would pull out, it would stop*".

This is at conflict with the key sustainability aim of UNIDO; to have the project incorporated in the national framework of investor surveys, to play a key role in monitoring investment, but more importantly to provide an efficient platform and toolkit for the purpose. As the UNIDO unit chief pointed out, every country involved in the Africa Investor Survey report has a budget set aside for data collection, and the ultimate aim is to encourage them to use this budget for their country as part of their normal data collection process.

Therefore, given the current uncertainty over sustainability without UNIDO/EU funding and overall coordination, further effort needs to be exerted in assuring this is brought into each organization's investment monitoring. Indeed, there are some early signs that this will be realised; for example, the Kenyan ministry of Planning and Development are keen on using the IMP as a monitoring tool to assess the progression of their economy. Similar discussions are underway with the East African Community (EAC), the African Union Commission (AUC), and the Economic Community of West African States (ECOWAS). Achieving collaboration with these organizations will play a key role in the sustainability of the Programme.

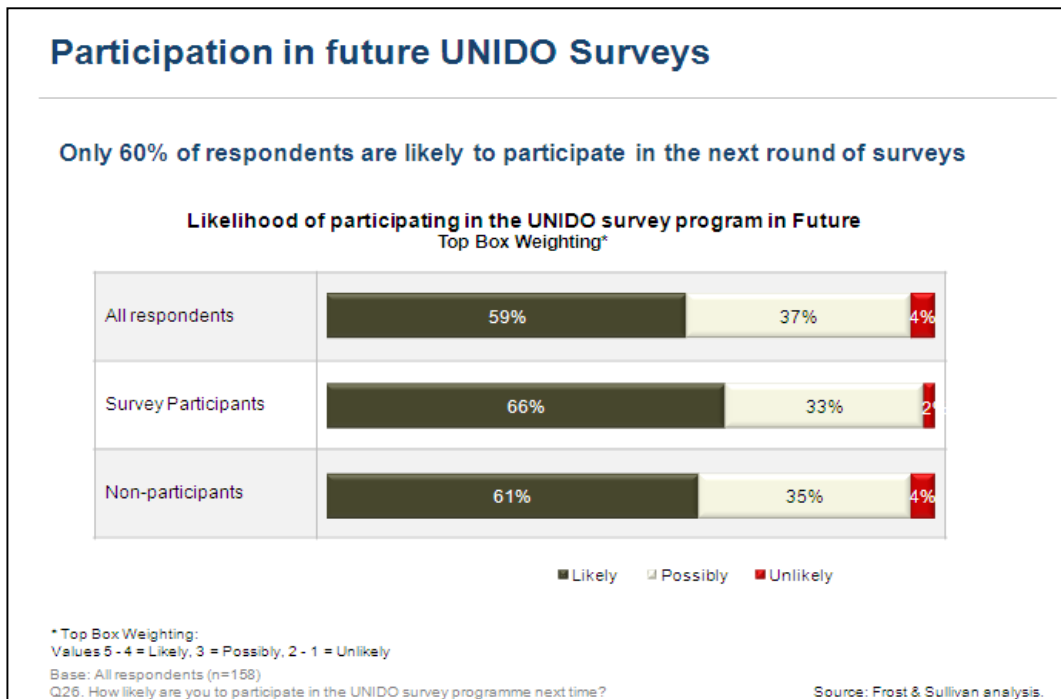
A positive indicator for future sustainability of the project was provided by COMESA's interest in extending the programme to the whole of the sub-region through 2013-16 with potential regional funding. The team is putting considerable effort in the dissemination at the RECS' level that - combined with the dissemination at country level through conferences and training - is expected to lead to a long term sustainability of the project.

Dissemination especially at RECS level - combined with the dissemination at country level through conferences and training - is therefore expected to lead to the long-term sustainability of the project.

An important factor of success in this area is related to the level of sensitisation and planning that will be needed in order to achieve a good sample size and participation of local enterprises without risking a delay in project consignment due to difficulties in reaching sample sizes/contacts as happened for the 2011 report. The following analysis is based on the online survey that the evaluation team conducted with local companies that have been involved in the project and assesses the prospects for achieving repeat surveys.

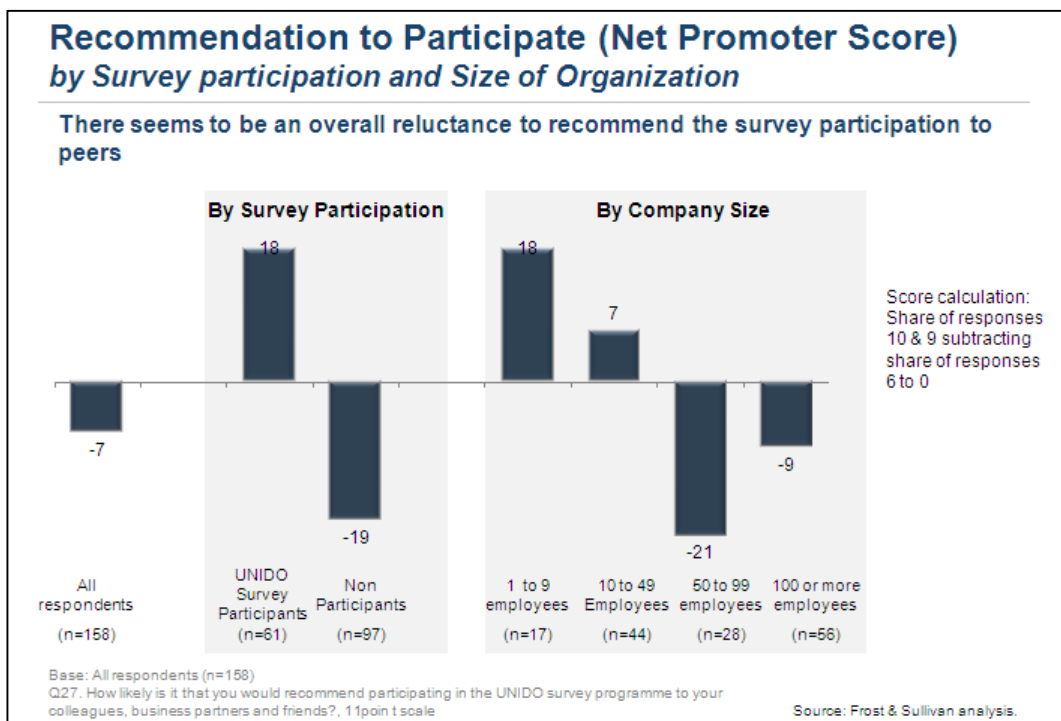
Figures 15 & 16 below provide a brief analysis of the evaluation survey respondents' views on participation in future UNIDO Investor Surveys.

Figure 15: Participation in future UNIDO Surveys



Source: Frost & Sullivan

Figure 16: Recommendation to participate in future Surveys



Source: Frost & Sullivan

The key take away points from the above analysis are:

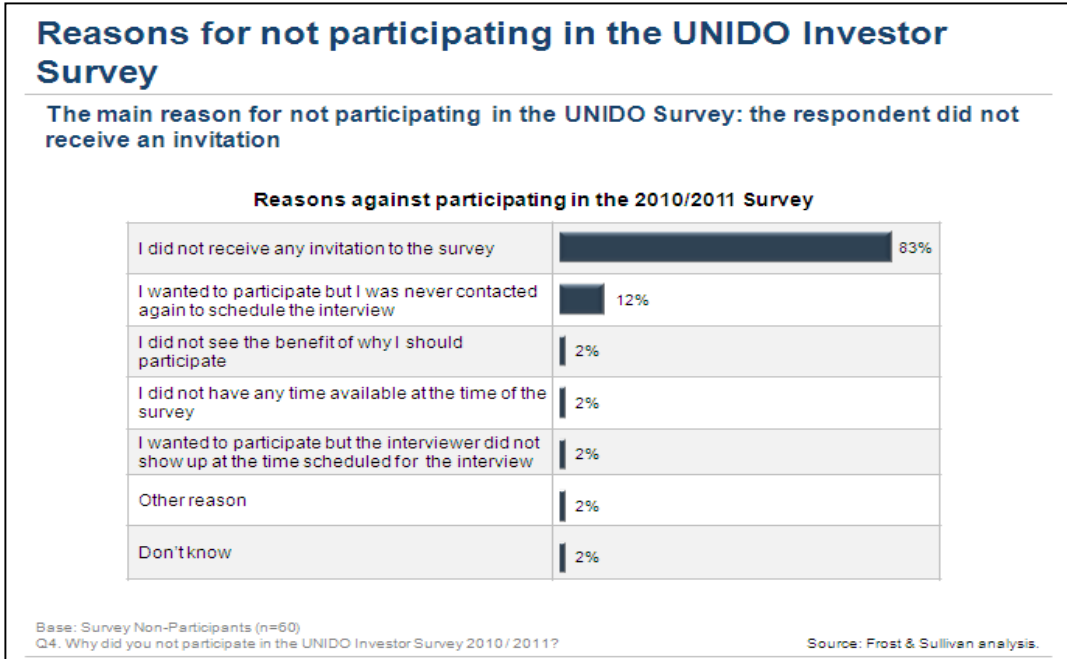
- Moderately 60 per cent claim that it is very likely/likely that they will participate in the next wave of the UNIDO Investor Survey;
- Smaller companies are more likely to participate in future surveys, as compared to medium and large enterprises.

The major learning:

- In the next wave of the UNIDO Africa Investor Survey challenges to convince the target audience to participate in the survey can be expected.

In terms of sheer overall numbers, with a sample base of 6,374 survey records in the first phase of the Africa Investor Survey, this clearly demonstrates the depth and impressive scale of the Programme, and a solid starting point. However, the online survey undertaken by the evaluation team has highlighted a potential challenge to this proposal, especially if more use of online survey techniques and interview scheduling are to be leveraged. Of the 6,374 records provided to the evaluation team, only 55 per cent of the addresses delivered used an e-mail address. Furthermore, an estimated 719 of these were invalid e-mail addresses, leaving a representative sample of 2,712 for the evaluation team to approach. In addition, a key finding of this sample was that just 39 per cent of those approached had actually participated in the Africa Investor Survey and there is a potential challenge to undertaking repeat surveys with this sample/database, as 61 per cent have not participated in the interview in the past.

Figure 17: Reasons for not participating in the UNIDO Investor Survey



Source: Frost & Sullivan

Cross-cutting Issues

There is scant consideration of cross-cutting issues such as gender, youth or environment in the design of the project or its umbrella programme. However, the South-South dimension of the project is evident, particularly as it is designed to promote regional investment, and the Report highlights growing South-South investment and trade – in for example showing India, China, South Africa and Kenya taking a lead in African manufacturing investments among the 19 countries covered by the survey - while North-South investments remain strong though diminishing as a share of the total.

Within the survey design, the Foreign Manufacturing Questionnaire (annex 3a) and the Domestic Manufacturing Questionnaire (annex 3c) include questions on regional and international trade and there is some discussion of the issues raised in chapter 2, figure 47a (p.85) illustrates investor assessments of the main barriers to exporting within Africa, and there is some discussion of investor awareness of regional trade arrangements.

The Report does not include analyses of investment impact on environmental sustainability, youth or gender. It does not serve as a policy advocacy tool for analysing these issues.

6.

Conclusions & Recommendations

6.1 Conclusions

Project identification and design

The formulation of the African Investor Survey 2011 followed a consultative and participatory approach and numerous previous UNIDO projects and products were used in project design and implementation stages. Participants from private and public sectors and RECs (ECOWAS, SADC, and COMESA) designed the final programme in an interactive process that involved four regional and 10 national levels stakeholder meetings.

With regards to the consistency between inputs and activities, outputs and progress towards the achievement of the objectives, the project document gives a theoretically coherent approach. Most of the project objectives are realistic within the larger programme's framework. The desired impact on poverty reduction overall is realistically more a long term (and indirect) objective, that will need to be supported by other (even if non UN related) development activities in order to be achieved.

The exact boundaries between the project and the programme are not clearly delineated in the project design. The document switches between the 'programme' and the 'project' repeatedly, making it difficult to decipher its intervention theory. Furthermore, descriptions of outcomes are numerous in different parts of the document, and can lead to confusion, and the terminology used for various levels of results foreseen is at times unclear, at the same time as there is no single over-riding development objective in the Programme design, and use of results-based terminology is non-standard with a number of Outputs and Outcomes resembling activities rather than results. Similarly, the LogFrame is low on measurable indicators and baselines, and lacks consideration of assumptions and risks. A positive evaluation is valid in respect to the clarity of external institutional relationships as highlighted in the project document.

The survey questionnaire design was in line with the project approach and – in its theoretical design - able to satisfy to a high degree the five groups of beneficiaries of the Investor Report. In practice however, the survey questionnaire was too long and too complicated to be answered in one or two interview sessions, and concerns were raised about some questions being financially too sensitive. Moreover, the questionnaire was focused on acquiring

highly accurate and detailed business and investment information, whereas trends and opportunities were addressed on a much lower level.

The project management arrangements and tools were adequate to support the fulfilment of the project realization plan, and ultimately worked towards achieving the project objectives. Of particular utility were the monitoring platform and the interview scheduling tool that allowed real time monitoring of project progress and risk management.

Relevance

The project is strongly relevant to UNIDO's mandate and competencies. Moreover, project ownership has been strong at the regional level. The Programme was endorsed by the Conference of African Ministers of Industry (CAMI) and included in the CAMI Declaration of 2008 as a key element of the Accelerated Industrial Development of Africa (AIDA). It was also endorsed by the EU-Africa Forum of 2010 and submitted as a recommendation to the AU Summit to expand the programme to all of Africa.

Based on the feedback received from national stakeholders, the project is highly relevant to the development needs of the target countries, and their associations, IPAs and enterprises. For four out of five respondents from industry, the UNIDO initiative is of interest and relevant, enabling them to analyse their own business performance and to benchmark themselves against peers.

In some instances, inadequate alignment with counterpart survey contents and schedules reduced the scope of ownership and involvement by local stakeholders in the survey process. The evaluation team concludes that it is UNIDO's responsibility to engage with stakeholders, to understand their position before project implementation and to aim at harmonising both the survey content and its schedule as much as possible with local agendas.

Chapter 2 of the Investor Report presents a wealth of relevant information on the characteristics of investment in the sub-Saharan economies included in the survey. If the survey is to be continued and expanded, it is expected that a time series can be built up. As of now, this analysis is lacking from the report. Still, it is fair to state that the Report provides valuable insights as to quality investments and FDI that will support IPAs in their decision making process. The relevance of the Report's design was questioned to some extent. Its usefulness might be partially weakened by the analytical techniques chosen, and the way in which the data is sometimes presented. Non-specialists might find technical parts of the Report difficult to access.

A number of respondents raised the possibility of including country specific chapters or producing standalone national reports, to highlight local and regional

investment opportunities based on outputs from the IMP. At present, discussions are underway with Cape Verde to adopt their template for a regional report. This could facilitate further links between UNIDO and the Regional Economic Commissions (RECs) in Africa.

Efficiency

The project management team at UNIDO HQ established an efficient implementation and monitoring mechanism, though the role of UNIDO's field offices in supporting project implementation was less than expected by some counterparts.

The project's monitoring tools; progress reporting and the Business Directory were of high quality. The process of establishing the business directory for each of the 19 countries has been the main challenge in implementation and a key cause of overall project delay, and was due to over-optimistic expectations at the project planning stage.

The bulk of the survey work was conducted over a period of 15 months, exceeding original plans by over a year. There was a significant variance in the effectiveness of CTLs and enumerators by country. The training materials were of high quality and deemed particularly useful by the evaluation team, though a high turnover of staff reduced the efficiency of training.

All but two of the countries in the survey used sub-contractors to assist with recruitment of enumerators and/or country team leaders. Some of the enumerator supervisors from sub-contracting firms were very effective at project initiation, but their presence on survey sites and interviews reduced in time, which could have had an impact on enumerator performance, guidance, and morale, and added to the quality assurance workload of the CTLs.

National support given to the project was overall very good, with much positive feedback in relation to the objectives and quality of the survey and (although not always completely satisfying in the planning phase) positive indications of collaboration with national stakeholders. However, there were also some instances where buy-in by local stakeholders/local organizations was less than optimal, and led to delays in project consignment. This was in the main related to inadequate initial awareness rising in some cases.

The financial delivery of the project has been higher than expected with a challenge in the project budget for the second survey being likely.

The quality of the inputs and analyses in the Investor Report is rather high, but it does not fully meet the standards required for achieving the intended results. As

an example, the Report states (p.29) : *“With detailed, comprehensive analysis, IPAs and other intermediary organizations can... achieve consensus among national stakeholders for a common investment promotion strategy with flexibility to adjust to emerging trends and challenges”*. But this is challenged by the likelihood of conflicts of interest between different national institutions (Ministries of Finance, Planning, Infrastructure, Industry, Trade, Energy, the Central Bank, etc.) and the ability to make rational decisions free of special interests.

The presentation of the survey results in chapters 2 and 4 of the Investor Report are of a quality required for the intended purposes of the project and should lead to an improvement in investment services. The data is however more limited at the sub-sectoral level, which hampers detailed analysis. There is no regional dimension to data presentation and no enterprise level analysis. The focus of the Report on IPAs, rather than on the broader issues of industrial development, means that the efficiency of the Report in promoting political support and assisting private companies in their investment decisions is less than it otherwise could be.

Effectiveness of the Project Results

The implementation team activities and outputs, including the Investor Report and the IMP have already led to outcomes in three main areas, namely: improvement of investment services provided to the private sector; increased availability of sub-sector level information for investment decision-making; stimulation of research for the analysis and interpretation of survey information. With regards to the remaining outcomes - enhancement of the policy advocacy role of national institutions and private sector organizations; improvements in the investment climate through reform programmes and the design of targeted investment promotion strategies as well as the facilitation of consensus building – it will be possible to assess their achievement only following a longer period of dissemination of the project outputs and, most importantly, following public statements of intent and support to the programme by local Ministers and RECs.

Most of the project outputs have been delivered satisfactorily with the exception of the initial sensitization work that was below expectations and reduced effective buy-in from companies and counterparts; and the dissemination of the Investor Report and the IMP, which remained pending at the time of the mid-term evaluation.

The IMP strongly supports the improvement of investment services provided to the private sector, increases the availability of sub-sector level information for investment decision-making and strongly stimulates the research for the analysis and interpretation of survey information. Together with the Investor Report, the IMP progresses towards meeting the overall project objectives, allowing IPAs and other local associations to support investors in their decision making and to

maximise in the medium to long term the impact of foreign and domestic investment on sustainable growth.

The Investor Report largely meets the objectives as stated in the project document and its analysis and conclusions will be relevant to the sample countries. The Report will assist countries in assessing their needs and evaluating the effectiveness of their own IPAs. The design and structure of the Report and the presentation and analysis of the data in chapter 3 in particular make it very likely that the Report will only be accessible to economists with a good understanding of quantitative analysis. The Report does not explicitly address issues of regional trade policy and the problems of industrialization and industrial location within regional groupings. Although there seems to be no direct analysis of issues relating to cross-border investment promotion, regional trade policy and liberalization of regional trade, the survey questionnaire was designed with one of its objectives being to assess trade issues and assist RECs. In order to benefit from this data, RECs will however need to access the IMP, not the Report.

In principle the Report will complement other survey efforts but more microeconomic and sub-sector data is required for the formulation of technical assistance programmes aimed at enterprise development.

None of the questionnaires used for the surveys (Foreign Manufacturing Questionnaire (annex 3a), the Foreign Service Questionnaire (annex 3b), the Domestic Manufacturing Questionnaire (annex 3c) and the Domestic Service Questionnaire (annex 3d) include a question on the gender or age composition of the labour force. This is an omission that should be rectified in future surveys.

During the evaluation period, the dissemination of the report (and the IMP) was still underway. The project implementation team reported that many launch events have been held and continue to be facilitated (especially at RECs level), and various media articles have been written. Of those who had attended a launch event, 79 per cent felt it provided them with unique insights, according to the evaluation team's survey.

Moreover, the evaluation survey of local enterprises revealed that 67 per cent of those contacted from the first phase of surveys had not received any outcome from the Africa Investor Survey in which they participated. When reviewing this in more detail, 60 per cent had not seen the Africa Investor Report, and 42 per cent the IMP.

Sustainability and Dissemination

Given the fact that the project was in mid-implementation stages at the time of the evaluation mission, the findings of this mid-term evaluation can only be treated as preliminary at this stage. Some project counterparts interviewed felt it necessary for the project to continue for another 3-5 years under UNIDO's management in order to safeguard sustainability. This continuation was particularly needed in order to have the project incorporated in the national framework of investor surveys, and to encourage the counterparts to use their own budgets for their country as part of their normal data collection process.

The evaluation team found encouraging early signs in this regard. The Kenyan Ministry of Planning and Development is keen on using the IMP as a monitoring tool to assess the progression of their economy. Similar discussions are underway with the East African Community (EAC), the African Union Commission (AUC), and the Economic Community of West African States (ECOWAS).

Furthermore, the Common Market for Eastern and Southern Africa (COMESA) is evaluating to extend the programme to whole of COMESA through 2013-16, which – if approved - will ensure the sustainability from a funding perspective for this period.

Dissemination of the Investor Report and the IMP especially at RECS level - combined with the dissemination at country level through conferences and training - is expected to support the long-term sustainability of the project.

Impact Assessment (potential)

The evaluation team's survey of companies and consultations with various African organizations and local stakeholders confirmed that the Investor Survey Report and the IMP are expected to make a positive impact on investment trends. Kenyan companies and various counterparts, for example, have already started using the Report and the IMP in their work.

More generally, it is clear that the investment climate in Africa has already changed for the better. The question that remains, and one that the project seeks to address, is what type of investment is likely to have the desired impact on raising the standard of living for Africans in general.

The underlying economic assumption of the project is that enhanced productivity and greater employment generation would be expected to lead indirectly to 'poverty reduction'. However, the impact of employment creation on poverty reduction will depend on other factors too, such as workers' income levels, FDI linkages to local suppliers, characteristics of the work force (gender, age),

technology transfer, infrastructure development etc. In the African context, close attention should also be paid to the employment potential in 'beneficiation', particularly in mining and fabrication of minerals. Inadequate attention to these factors in the survey design and the content of the Investor Report is likely to reduce the potential impact of the project.

Cross-cutting Issues

There is scant consideration of cross-cutting issues such as gender, youth or environment in the design of the project or its umbrella programme. However, the South-South dimension of the project is evident, particularly as it is designed to promote regional investment, and the Report highlights growing South-South investment and trade.

Within the survey design, two of the survey questionnaires (included under annex 3 and 3c) include questions on regional and international trade and there is some discussion of the issues raised in chapter 2 of the Report, figure 47a (p.85) illustrates investor assessments of the main barriers to exporting within Africa, and there is some discussion of investor awareness of regional trade arrangements.

The Report does not include analyses of investment impact on environmental sustainability, youth or gender. It does not serve as a policy advocacy tool for analysing these issues.

6.2 Recommendations

Project design (regarding future similar projects)

1. UNIDO investor survey project documents should be clear on their intended results and the causal chain leading to them. Inputs, Activities, Outputs and Outcomes should be plainly stated with use of standard terminology, and the Theory of Change of the project and its relation with the umbrella programme should be contextualized and presented in a diagrammatic fashion. The project LogFrame should include standard elements such as all levels of results, their success indicators, targets and consideration of the baseline situation. In addition, they should include considerations of assumptions, and the project document should also include a section on risks and mitigation factors considered.
2. Future survey questionnaires should be redesigned to be shorter, less financially sensitive, more harmonized with local survey schedules, and include cross-cutting themes, in line with the following details:
 - a. Reduce the length of the questionnaire to 30 to 40 minutes (as compared to the original estimated length of between 60 and 120 minutes);
 - b. Reduce the level of financial detail required from respondents by inserting more closed end questions and by inserting more sophisticated skip patterns;
 - c. Programme questionnaires to include automatic check routines and currency conversions to avoid mistakes of both respondents and enumerators and reduce the need for manual checking;
 - d. Survey schedules and content should be harmonized with local survey schedules and RECs in order to enhance ownership and relevance of the survey and the resultant Investor Report;
 - e. Include, as far as possible, specific questions on cross-cutting issues; include questions on the gender and/or age composition of the labour force; and
 - f. Consolidate and maintain a single, clean database of contacts in order to ensure the implementation of the above suggestions.

Project implementation

3. Future surveys, project implementation and management processes should be made more efficient in terms of staff recruitment and retention as well as linkages with local institutions, with the following details:

- a. The project steering committee should include survey professionals to validate realism of questionnaires and/or run trials;
- b. Circulate more information to businesses in advance of surveys;
- c. Focus strongly on sensitization and capacity building efforts is needed for the next survey phase, as well as timely stakeholder engagement in order to enhance local relevance and ownership with a strong focus on promoting SANG and the IMP as cost-saving tools;
- d. Field survey time should be shortened to 3-4 months (instead of the original 15 months);
- e. Spend more time on training country team leaders (CTLs) throughout the process, to facilitate seamless integration of new enumerators into the survey teams by undertaking most of the training locally without too much UNIDO project implementation team involvement;
- f. Pair local CTLs with a UNIDO staff member who rotates between countries (hybrid solution), or deploy a UNIDO staff member to be the local CTL (centralised solution);
- g. Train enumerators to commence a maximum of 6 weeks before fieldwork initiation;
- h. Recruit “top up” staff in batches throughout the survey period, to ensure full training prior to deployment in case substitutions are necessary;
- i. Pool resources from several of the national associations’ survey programmes in each country, to reduce training requirements (as the staff are undertaking such data collection constantly), which would also ensure higher staff retention;
- j. Produce an “approved supplier” list in each country based on past experiences, and a consistent set of terms and conditions implemented with all sub-contractors. As a last resort, this could include fund reimbursements to UNIDO (where local resourcing requirements are not met by sub-contractors);
- k. Longer term, as the responsibilities of the surveys are transferred to national institutions, the training and recruitment of enumerators should become the remit of those institutions, as long as quality standards for the data can be ensured;
- l. Provide more remote privileges to supervisors to ensure a more timely uploading and approval of questionnaires; this could be achieved by providing a wireless dongle or encouraging supervisors to use Wi-Fi facilities remotely where possible, and providing access to the server remotely;

- m. Allocate additional resources specifically on capacity building for the business directory (with or without the NSOs' assistance);
 - n. Share regular quarterly or six-monthly project progress reports with donors and stakeholders; and
 - o. Make the raw survey and Report data accessible and the variables, both dependent and independent, defined more carefully and details given on how they are measured or constructed, and indicate whether proxy measures are being used.
4. With most project funds already expended, a challenge in project budget for the second survey is likely and the evaluation team would therefore strongly recommend a feasibility assessment of the second survey from a financial point of view.

Investment Report design and relevance

5. Future Investor Reports should be better targeted, more user-friendly, include case studies and sector-specific information, cognisant of the significance of extractive industries in the region, and more readily accessible to stakeholders, in line with the following details:
- a. Clarify definitions of terms and improve data presentation to make the report more accessible to non-specialists;
 - b. Add graphs/charts or conclusions that would make the report more accessible to non-economists, particularly where the analysis is complex;
 - c. Since one objective of the Report is to identify qualitative differences between local and foreign owned enterprises, include more sub-sector information and analysis, and identify matching enterprises as far as possible – i.e. similarities in size, age, market structure, etc. - so that a useful comparison can be made of the capital intensities of otherwise similar domestic and foreign enterprises etc.;
 - d. Make greater use of case studies of enterprises, sectors and countries;
 - e. Recognize and reflect the limitations of cross country regression analysis, and the limitations of the data available in the Report's analyses;
 - f. Include a more accessible discussion of the results of the surveys, presented in a straightforward manner in order to i) indicate to potential investors where opportunities exist, ii) identify key macro and sectoral bottlenecks; iii) help IPAs to target desirable potential investors and target sectors more effectively; and iv) assist policy makers in the selection of the most effective incentive packages;

- g. Pay closer attention to Africa's extractive industries and associated manufacturing and service sectors. A key area of focus in this regard should be on creating more demand for locally beneficiated minerals. Attention should also be paid to the size of the domestic and intra African market for fabricated, semi finished or finished goods;
- h. Identify the target audience for the Investor Report more carefully; and
- i. Provide access to the Report to every private company and every public association involved in the project.

Sustainability

- 6. UNIDO should continue supporting this programme in the short to medium term, with the aim of gradually handing it over to regional and local authorities and associations.
- 7. UNIDO should support individual countries take a lead in generating country specific reports/chapters, based on their individual needs. Like in Cape Verde UNIDO could support with templates and training, but ultimately it should be the responsibility of the country to lead the way in terms of analyzing the data and creating investor reports;
- 8. In order to safeguard continued interest and participation by regional and national associations, UNIDO should leverage the potential of the Investor Report and the IMP, utilize new social media and other advocacy solutions, and disseminate project outputs more widely, with the following details:
 - a. Strongly promote the Report and the IMP in order to find more project donors in Africa (e.g. with COMESA and other RECS);
 - b. Develop and test the business case for the IMP to quantify the extent to which national associations could cut their costs by using the IMP; the outputs of this can be used as the core marketing activity to seek collaboration with organizations experiencing funding constraints, or where funding has precluded their involvement in the IMP and Investor Surveys;
 - c. Employ low cost (but effective) marketing channels such as television & YouTube appearances, use social media such as LinkedIn or Twitter as well as Google Analytics; Some more targeted and considered tagging of such relevant threads on the UNIDO website, press releases, and IMP itself, will help to achieve a wider dissemination digitally, and therefore relatively inexpensively;
 - d. Hold further launch events in order to meet the needs of survey participants, but more importantly to provide the platform to deliver outcomes of the survey process and investment monitoring.

Impact

9. In order to more realistically assess the impact of investments on 'poverty', the next survey and the Investor Report would need to expand their scope into indicators and analyses that cover such areas as income generation, youth and women, and to address the question of 'inequality' (e.g. through use of the Gini Coefficient) more directly.
10. In order to enhance the project's impact on national investment policies, the Investor Report should focus less on the needs and priorities of the IPAs and more on those of key decision-making institutions such as planning and finance ministries.

7.

Lessons learned

Enterprise survey questionnaires that are lean, quick and non-intrusive in terms of financial data are more likely to be effective in gaining private sector cooperation.

Enterprise surveys of a significant volume require strong national awareness raising efforts at the launch stage with public and private sector support and proactive involvement.

Enterprises that participate in investor surveys expect UNIDO's appropriate and timely follow-up through distribution and sharing of survey outcomes, as well as acknowledgement of partners' participation.

Annex A: Terms of Reference

Terms of Reference (October 2011)

CALL FOR PROJECT EVALUATION SERVICES

Independent Mid-Term Evaluation of the UNIDO Project:

“Survey of enterprises in selected ACP regions”

Project number: EE/RAF/08/043

Period covered: 2008-2011

Background

This call for tenders is aimed at the selection of a competent body to conduct an in-depth mid-term evaluation of UNIDO's regional project in Africa, (project code 'EE/RAF/08/043') entitled "*Survey of enterprises in selected ACP regions*". The project plans included two surveys of investors in the African region. The first survey under this project was planned for 2009, but was conducted over 2010-11. A second survey was planned for 2011 but is now expected to be carried out in 2012. This evaluation exercise is being conducted as an integral part of the planned outputs (Output 2) of the project to evaluate the first survey in order to feed into the design of the second survey. The project was designed in response to needs assessments conducted over a seven year period, since the inception of UNIDO's African Investment Promotion Agency Network (AfrIPANet) Programme. The two investor surveys were designed to cover 19 African countries² and up to 10,000 companies. A description of the Survey approach follows.

Project budget

²Burkina Faso; Burundi; Cameroon; Cape Verde; Ethiopia; Ghana; Kenya; Lesotho; Madagascar; Malawi; Mali; Mozambique; Niger; Nigeria; Rwanda; Senegal; Tanzania; Uganda; Zambia

Total Allotment:	€2,314,560
Total Expenditure (Sept. 2011):	€2,085,409
Donor:	European Commission

Problem to be addressed

The Investors Survey project's approach identifies a core problem among most African economies as a need for attracting higher levels of investment. This is in turn seen as caused by a lack of adequate and quality information for involved stakeholders, which is then to be ameliorated through regional surveys coupled with other analytical and networking tools with use of internet-based platforms for services such as benchmarking and matchmaking for local and foreign companies engaged in various value chains. Some of these value chains are seen as more strategic than others – e.g. manufacturing versus extractive industries – for enhancing productive capacities and generating added value with greater poverty reduction potential. In doing so, the project aims to enhance regional investment promotion strategies and foreign direct investment (FDI) policies for the greater goal of poverty reduction.

It is estimated that in order for the continent to achieve the Millennium Development Goal (MDG) of reducing poverty rates by half by 2015, Africa needs to fill an annual resource gap of \$US 64 billion, equivalent to about 12 per cent of Gross Domestic Product (GDP).

Recognizing the value of FDI, several African countries have made strong efforts through legislative and procedural reforms to improve their investment climate and attract the right kind of FDI for poverty reduction. But the sparse inflows of FDI to the continent are still mostly concentrated in a few resource-rich countries, and FDI inflows elsewhere rarely contribute significantly to the development of their economies.

One of the reasons attributed include weaknesses in the institutional infrastructure. The market-supporting institutions that should provide accurate public information, set standards and enable market agents to assign resources efficiently, are only just emerging. As a result, failures in the market are not adequately addressed, appropriate forms of FDI not identified and targeted, and local supplier shortfalls in meeting investor requirements not recognized or remedied.

African investment promotion agencies (IPAs) and other intermediary organizations are now tackling this information and capability shortfall. They are pursuing ways to go beyond their traditional function—promoting their country and attracting FDI in general—to taking on a more pro-active role as agents of development who will attract quality investment in productive sectors and mobilize supportive business services. To succeed in this, they must find the answers to six essential sets of questions:

- Foreign investors:
 - What are foreign investors actually doing on the ground?
 - What trends are emerging in the way they do business?

- Domestic investors:
 - How are domestic investors benefiting from FDI?
 - How are they responding to it?
 - To what extent are their actions affecting FDI decisions?

- IPAs and policy-making:
 - If the IPAs are to influence government policy and become effective advocates of reform, what kind of empirical evidence do they need to collect?

- IPAs and foreign investors:
 - How are foreign investors responding to IPA initiatives?
 - How effective do they find IPA services?
 - Which groups of investors are most in need of IPA services?
 - Do investors face any additional problems?

- IPAs and domestic investors:
 - How can IPAs support domestic investors?

- Domestic and foreign investors:
 - How can foreign investors be encouraged to increase the local content of their supply?
 - What kind of information do they need to develop effective strategies for local sourcing?
 - What sort of assistance is needed to help local suppliers respond to foreign buyer requirements?

The approach of the Investors Survey project is to help IPAs obtain answers to these questions in order to better enable them and other intermediary organizations promote investment, influence government policies, maximise the impact of the resources that are put into investment promotion and achieve consensus among national stakeholders around a common investment promotion strategy.

Project goals and implementation arrangements

In the above context, the development objective of the project launched in 2008 was *“to support African countries to maximize the impact of foreign and domestic investment on sustainable and equitable growth and poverty reduction; to enhance competitiveness of the manufacturing and services sectors in order to capture export markets and achieve greater integration with global value chains and regional economic markets.”*

The implementation of the two Surveys were sub-divided into a total of 12 ‘results’³, of which six would be implemented in the framework of the first Survey and six in the framework of the second Survey.

Table 7: 2009 Survey & 2011 Survey

2009 Survey		2011 Survey	
1.1.	Project teams and national capacities for data maintenance and updating	2.1.	Independent Evaluation
1.2.	Sensitization	2.2.	Survey methodology and definition of research issues
1.3.	Compilation of business directory and sampling frame	2.3.	Updating of business directory and sampling frame
1.4.	Data collection and quality check	2.4.	Data collection and quality check
1.5.	Finalization of Survey Report	2.5.	Finalization of Survey Report
1.6.	Survey Report Dissemination at the country-level	2.6.	Survey Report Dissemination at the country-level

2009 Survey (Output 1 - per Produce)

The first Investor Survey Report and Indicators were planned to be prepared, published and widely disseminated to stimulate further research and interest in investment opportunities in Africa. A central planned theme of the first Report was to study the potential for and effect of interactions between domestic and foreign investors and to identify beneficial linkages, in particular through domestic supply chains. The contribution of regional trade agreements would be assessed and its effect on stimulating the arrival and expansion of certain investor groups were to be studied. The report would compile indicators, based on current figures and own-forecast figures of expected investment flows, etc.; expected employment growth for countries and sub-sectors; anticipated skills gaps; expected capacity utilization rates; and expected energy usage in selected sub-sectors. Investor assessments of the performance of intermediary organizations were also to be collected.

³ As described in the project document, but in fact these would be better described as ‘activities’.

Upon establishment of the bodies mentioned above, activities would encompass country sensitization campaigns to elicit local ownership and secure the highest-level of political support for the process. The country team leader (CTL) would mobilize national champions from within the private sector to lend support to the survey effort. Together with the Implementation Committee (IC), which would consist of representatives of the National Statistics Offices (NSOs), investment promotion Agencies (IPAs) and Chambers of Commerce, he/she would execute carefully targeted communications campaigns to ensure that large segments of the private sector become sensitized to the objectives of the survey and would become aware of the incentives for their participation. Such pre-survey communication campaigns would target CEOs and try to convey the importance of their cooperation in building a robust mechanism for furthering public-private sector dialogue and the prospect of establishing a virtuous reform process. The CTL and his team of enumerators would be required to upload the data gathered during company interviews at least once every week. The CTL would be given extra funds to recruit additional support staff for this purpose, so that the enumerators would focus on the company visits and interviews. The launch of the survey report would be in the framework of the AfrIPANet V Conference at the beginning of 2010 where all Member IPAs convene to use the findings of the survey to draw up specific recommendations for African IPAs and outline technical assistance requirements for different relevant organizations and donors. In addition, UNIDO would organize individual country meetings in order to present the specific results to a large group of national stakeholders in each of the participating countries.

Independent Evaluation (Output 2.1 - per Produce)

At the end of the first survey and prior to the launch of the second one, an external evaluation would assess the conduct of the survey, the level of confidence of the data and the utility of results. It would permit the timely incorporation of findings, recommendations and lessons learned into the design phase of the second Investor Survey. The questionnaire will be adapted to reflect the recommendations of survey respondents and the evaluation team so as to deepen the research on particular areas or shed light on hitherto un-addressed issues.

The evaluation of the first survey will give guidance for the methodologies and approaches of the second Survey. The evaluation will be conducted in full compliance with the "Financial and Administrative Framework Agreement (FAFA) between the EC and the UN". As outlined in the "Focus on Results" Section of the FAFA (pp. 2-3), UNIDO will facilitate the participation of the European Commission in the evaluation mission by making a submission of proposal that will outline the proposed evaluation plan of the relevant Action. The proposal gives details on the timing and scope of the mission, questions the mission wishes to raise with management of the organization, nature of programme information, and whether missions are to visit headquarters locations and/or field offices.

For details of the evaluation approach, see below (Section VII onwards).

Implementation, advisory and supervision bodies

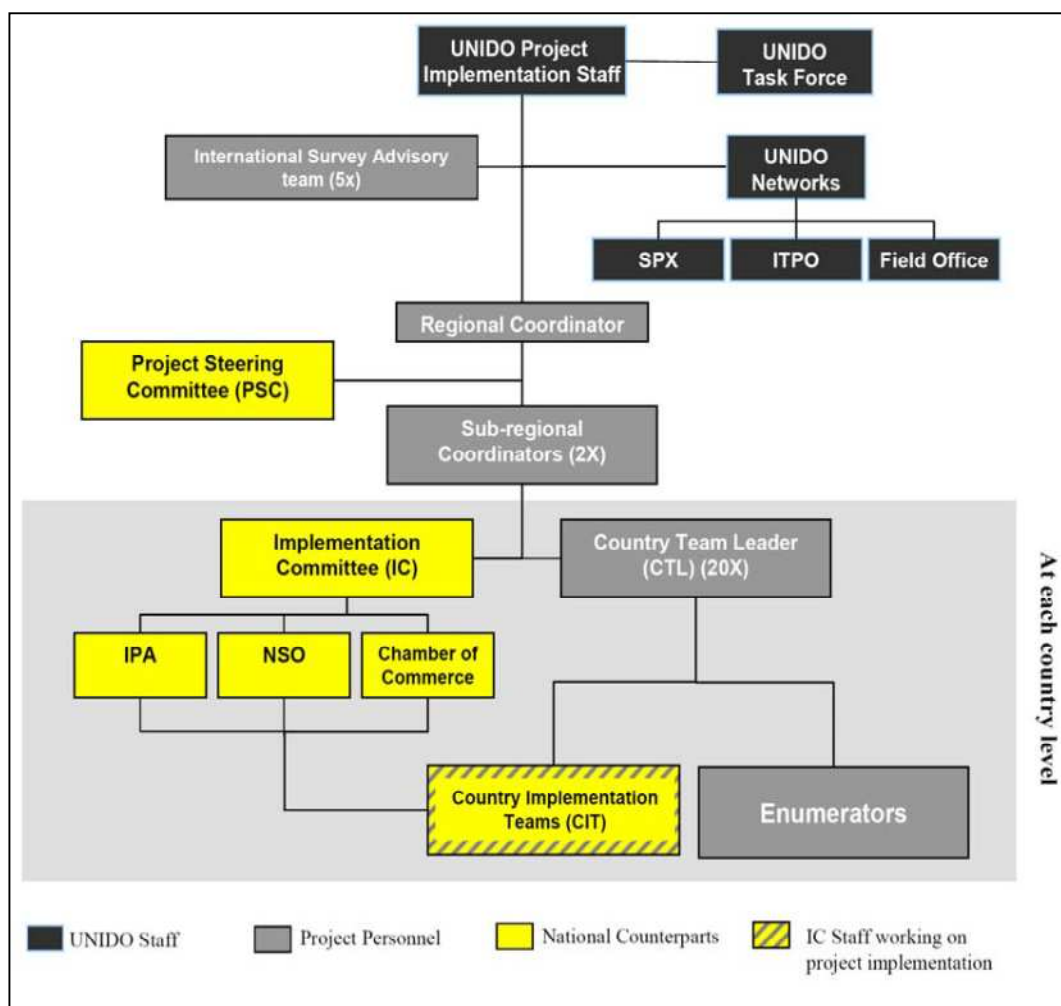
The project implementation structure is comprised of the following teams;

- a. UNIDO project implementation teams (Headquarters team with Investment Promotion Unit as lead implementation group, the in-house Task Force as supporting group, and ITPO, SPX and Field Office Networks);
- b. Project staff consisting of international experts for survey sensitization and survey supervision at the regional level and national consultants for organization and survey implementation;
- c. National counterparts that make up the Inter-Agency Implementation Committees (IC) that will be the main beneficiaries of the project and the organizations that will take the main responsibility for implementation at the country level.

The overall project monitoring will be through the Project Steering Committee (PSC). The PSC is a forum that brings together the stakeholders who provide funding for the project and other donors and stakeholders who are engaged in Africa with the efforts to address the problems associated with private sector growth and development. The PSC also provides an arena for donor coordination in Africa. Country team leaders will be selected to provide coordination of all country level activities, support to the Implementation Committee (IC) and oversee the execution of the two surveys. The CTLs will be placed in a suitable field operations centre (e.g. UNIDO/UNDP Office, IPAs or Chambers of Commerce). The CTLs will spearhead the sensitization and awareness creation programmes for in-country consensus building within the public the private sector. The CTL is also responsible for the compilation of final company lists, the establishment of the full team of enumerators, training of enumerators, sensitization and survey promotion vis-à-vis various stakeholders, management of survey execution, consolidation of country-level results etc. The CTL will not only be the country team leader for the survey-related activities but will also be the central figure for interacting with the project counterparts in the country. He/she will be a facilitator and act as a secretary to the IC.

The sub-regional coordinators will manage the survey implementation process in their respective regions. This includes supervision of CTLs, addressing of any contentious issues that may arise in the course of the survey implementation and which may be beyond solution by country team leaders, liaising with ministers, embassies & UNIDO office, and informing and alerting UNIDO headquarters team of any significant changes, problems and developments that may impact negatively on the survey and project objectives.

Figure 18: Overall project monitoring



Linkage to development objectives

The project has direct linkages with the basic goals of NEPAD (The New Partnership for Africa's Development) that emphasizes the importance of promoting foreign direct investment and trade and *"measures for enhancing the entrepreneurial, managerial and technical capacities of the private sector by supporting technology acquisition, production improvements, and training and skills development"*. Among others, NEPAD stresses the importance of the reduction of costs for transactions and operations, the promotion and improvement of regional trade agreements and interregional trade liberalization to expedite a sustainable development of private and foreign companies in Africa.

The project has direct linkages with the Millennium Development Goal No. 8 and in particular with the Target 12 and Target 18:

- MDG 8, Target 12: *Develop further an open, rule-based, predictable, non-discriminatory trading and financial system [Includes a commitment to good governance, development, and poverty reduction – both nationally and internationally].*
- MDG 8, Target 18: *In co-operation with the private sector, make available the benefits of new technologies, especially information and communications.*

Evaluation purpose

The evaluation will be conducted as a mid-term evaluation with a focus on results and will thus be conducted as an assessment of the overall design and orientation of the project, a review of the project's implementation status and for identifying lessons that could be useful for the design and implementation of the second Investors' Survey.

The purpose of the evaluation is to assess:

1. The relevance and coherence of the project's theoretical approach and underpinnings with regard to investment promotion and FDI with a focus on Africa's economic development and poverty reduction needs, particularly in the 19 countries covered;
2. The relevance of the project to various categories of stakeholders including governments, investment promotion agencies, other national counterparts (e.g. national statistical offices) foreign and local investors, different categories and sizes of enterprises etc.;
3. The relevance of the survey design and associated analytical tools, including for the specific national contexts and various categories of target enterprises;
4. The quality and reliability of the data collected and the published survey report(s);
5. Project effectiveness in terms of the outputs produced and outcomes achieved as compared to those planned; this should include an assessment of lessons learned in how to approach and gain the confidence of various categories of target enterprises;
6. Efficiency of implementation: quantity, quality, cost and timeliness of UNIDO and counterpart inputs and activities;
7. Project design and implementation and management arrangements ranging from the central level in UNIDO HQ through to in-country arrangements;
8. Prospects for development impact;
9. Long-term sustainability of the support mechanisms results and benefits;
10. Synergies, coordination and relations with partners;

11. Lessons and specific recommendations for the design of the next Investor Survey planned under the project.

The evaluation should provide the necessary analytical basis and make recommendations to the relevant governments in 19 African countries, counterpart institutions, and the donor and to UNIDO for the continuation of the project to completion. The evaluation should also draw lessons of wider applicability for the replication of the experience gained in this project in other similar projects concerned with local and foreign investment with a focus on poverty reduction issues.

Methodology and scope of the evaluation

The evaluation will be carried out in keeping with agreed evaluation standards and requirements. More specifically it will fully respect the principles laid down in the “UN Norms and Standards for Evaluation” and UNIDO’s Evaluation Policy.⁴

The evaluation will attempt to determine as systematically and objectively as possible the relevance, efficiency, achievements (outputs, prospects for achieving expected outcomes and impact) and sustainability of the project. To this end, the evaluation will assess the achievements of the project against its key objectives, as set out in the project document, including re-examination of the relevance of the objectives and of the design. It will also identify factors that have facilitated or impeded the achievement of the objectives.

The evaluation will be carried out through analyses of various sources of information, including desk analysis, survey data and instruments, and interviews with counterparts, beneficiaries, partner agencies, donor representatives, programme managers and through the cross-validation of data.

In view of the complex nature of this mid-term evaluation exercise with several countries and partners involved, particular attention will be given to the elaboration of:

- a) A detailed methodology for assessing and evaluating the quality of the design of the Investor Survey;
- b) A strategy for evaluation field surveys; and
- c) Related evaluation questionnaires.

Given the large scope of the project, the evaluation scope will be limited to 10 countries out of the total of 19 sub-Saharan countries in the project, which includes eight countries in the west, five in the south and six in east and central Africa regions. Of these, the evaluation is expected to include four selected

⁴ All documents available from the websites of the UN Evaluation Group: <http://www.uneval.org/>

countries from the west and the remaining six sample countries from central, east and southern Africa. The countries selected should include a representative cross-section of landlocked, least developed, lower middle income and island countries. Similarly, the sample of countries to be evaluated should include large, medium and small countries, both in terms of land mass and population. Furthermore, the sample should be representative of the region's linguistic and cultural diversity.

In the same manner, within each country, a sample of companies covered by the project should be made to include at least 10 per cent of all companies surveyed under the project. These companies should be representative of the larger whole, including - but not limited to - factors such as location, size, ownership (local/foreign etc), sector/type of business, and their levels of engagement in local and regional value chains. The evaluators should also include a representative sample of companies that did not respond to the survey in each country context.

Evaluation Issues

While maintaining independence, the evaluation will be carried out based on a participatory approach, which seeks the views and assessments of all parties. It will address the following issues and key questions:

Project identification and formulation

- The extent to which a participatory project identification process was applied in selecting problem areas and solutions;
- The extent to which lessons from earlier surveys were taken on board in the formulation process;
- Clarity and realism of the project's development and immediate objectives, including specification of targets and identification of beneficiaries and prospects for sustainability;
- Clarity and logical consistency between, inputs, activities, outputs and progress towards achievement of objectives (quality, quantity and time-frame);
- Clarity and logical consistency between the project approach and the design of the survey questionnaire;
- Realism and clarity in the specification of prior obligations and prerequisites (assumptions and risks);
- Realism and clarity of external institutional relationships, and in the managerial and institutional framework for implementation and the work plan.

Project relevance & ownership

- Relevance of the project design to development priorities and needs of target countries as well as large, medium, small and micro-enterprises;
- The relevance of a) the project approach, b) outputs and outcomes, and c) the survey questionnaire design to:
 - The investment needs and economic priorities of target countries;
 - Promoting local and foreign investment in selected countries;
 - The needs and priorities of different categories of enterprises such as domestic, foreign, large, medium, small & micro-enterprises etc.;
 - The needs and priorities of host institutions selected for managing the surveys.
- The relevance of the survey design, implementation modalities and approaches to the specific contexts of the target countries and various categories of enterprises at the country level;
- The relevance of the targeted companies to UNIDO's mandate;
- The extent to which counterparts have been appropriately involved and were participating in the identification of their critical problem areas and in the development of implementation strategies and are actively supporting the implementation of the project approach;
- Counterpart contributions and other inputs have been received from the involved parties as compared to the project document work plan.

Efficiency of Implementation

Efficiency and adequacy of project implementation including:

- Availability of funds as compared with the overall budget and country-specific budgets;
- The quality and timeliness of input delivery by both UNIDO (expertise, training, equipment, methodologies, etc.) and the Government as compared to the work plan(s);
- Managerial and work efficiency;
- Adequacy of monitoring and reporting;
- The extent of national support and commitment and the quality and quantity of administrative and technical support by UNIDO.

Assessment of whether the project approach represented an efficient use of given resources for achieving the planned objectives, including in each country context. This should include the manner in which target companies were

selected, selection and trainings of enumerators and CTLs, and the approach used to collect data - hardcopy questionnaires vs. questionnaire software allowing for electronic submission of questionnaires etc.

Effectiveness and Project Results

- Full and systematic assessment of outputs produced to date (quantity and quality as compared with work plan and progress towards achieving the immediate objectives); and
- An assessment of the outcomes that have occurred or are likely to happen through utilization of outputs.

The evaluation should include specific methods for gauging the effectiveness of the project outputs in the following areas, among others:

:

- The manner in which target companies were selected, and the criteria used for prioritisation of various company types and sectors;
- The quality and utility of manuals, handbooks (e.g. for Country Team Leaders, Supervisors and Enumerators) guidance notes, training and training materials, promotional materials, advocacy initiatives (media included) and other key tools used for achieving intended results;
- Measures and approaches put in place for gaining the confidence and cooperation of various categories of enterprises and their associations (e.g. stakeholder sensitization campaigns and use of national 'champions' etc.);
- Reliability of the data collected;
- Analytical methods used for data gathering, processing and analysis;
- The structure, content, reliability and accuracy of the data, and the quality of analyses contained in the first Survey's Report.

Project coordination and management

- The extent to which the central, regional and national management and overall field coordination mechanisms of the regional project have been efficient and effective;
- An assessment of context-specific measures (if any, concerning both public and private sector partners and target institutions) devised and put in place by UNIDO and the project managers, and related recommendations and lessons, including in measures for approaching private sector companies to be surveyed;
- An assessment of implementation partnerships and advantages/disadvantages in the selection of implementing parties and mechanisms; This should include an assessment of the management

arrangements in each country, and the effectiveness of the Host Institutions-Country Team Leader- Country Enumerators set up for conducting the surveys;

- An assessment of the monitoring mechanisms in place, and whether they are sufficiently based on indicators for outputs, outcomes and objectives and using that information for project steering and adaptive management;
- Changes in planning documents during implementation have been approved and documented;
- Coordination envisaged with any other development cooperation programmes and relevant associations in target countries has been realized and benefits achieved;
- Synergy benefits can be found in relation to other UNIDO and UN activities in the country;
- The extent to which project implementation has been cognisant of and coordinated with similar or duplicate donor activities – if any - in the target countries (e.g. the EC-funded Community of Opportunities for Development - COM4DEV - an online business network created under the Reinvest programme. www.com4dev.com).

Prospects for achieving the expected impact: Prospects for achieving the desired outcomes and impact and prospects for sustaining the project's results by the beneficiaries and the host institutions after the termination of the project.

Recommendations for the next phase, or replication elsewhere: Based on the above analysis the mission will draw specific conclusions and make proposals for any necessary further action by UNIDO and its partners to ensure sustainable development, including any need for additional assistance and activities of the project prior to its completion, as well as recommendations for future surveys.

Main evaluation tasks

The evaluation will encompass the following main tasks and estimated timeline:

Table 8: Timeline of evaluation activity

Activity	Timeline
1. Desk study of available documents, the survey tool and published reports and definition of a preliminary evaluation methodology with a catalogue of project specific evaluation questions (including but not limited to the above questions), to which the evaluation should provide answers.	Nov/Dec 2011
2. Analytical review of the economic, political and security conditions in targeted countries with a particular focus on investment and industrial growth issues drawing on wide range of information sources.	Nov/Dec 2011
3. Initial briefing and consultations with b) UNIDO project staff and managers, the UNIDO Evaluation Group and the Permanent Missions of target countries in Vienna; and b) the EC partners in Brussels to further develop the methodology to be agreed and finalised in close consultation with the Evaluation Group in UNIDO. The latter meeting in Brussels will also include a delegation from the UNIDO Evaluation Group for detailed consultations with the EC on the evaluation methodology.	Nov/Dec 2011
4. Submission of an inception report including a detailed methodology and field assessment mission plans for clearance by the Evaluation Group. The EC, as the project donor, may identify a delegate to participate in some of the planned missions to the field.	December 2011
5. Implementing the evaluation in Vienna and in target countries and counterpart institutions in Africa in line with the agreed methodology.	December 2011 to February 2012
6. Meetings in Vienna with the Project Managers and the Evaluation Group to present and discuss the evaluators' preliminary findings.	February 2012
7. Submission of the first draft report.	February 2012
8. Circulation of the first draft to African counterparts, the EC and UNIDO for feedback and comments.	Feb/March 2012
9. Preparation of the final report.	March 2012
10. Presentation of the final report in Vienna to UNIDO and the EC as well as the permanent missions of target countries.	March 2012

Services required

The evaluation institution will have the following functions, competencies and skills:

1. Documented experience in:
 - a. Research and publications capacity of the highest quality in investment promotion and FDI issues in the African context;
 - b. Designing and managing complex evaluations with multi-disciplinary approaches and multi-cultural teams of evaluators;
 - c. A sound understanding of best practices in the use of online platforms for establishing and promoting business networks on a regional level;
 - d. Evaluating and/or designing investment promotion initiatives;

- e. Complex qualitative and quantitative field survey design, implementation and analysis in the African context, preferably with the private sector;
 - f. Preparing evaluation reports in line with agreed UN standards;
 - g. A strong network of regional researchers, enumerators and surveyors to draw on in Africa;
 - h. Excellent English and French language drafting skills.
2. Evaluators with documented experience in executing and/or in-depth knowledge of:
- a. Development projects aimed at private sector development;
 - b. Economic analyses with a sound grasp of the priorities and concerns of developing countries;
 - c. Best practices in survey design and execution, particularly aimed at the private sector;
 - d. Conducting interviews and surveys and preparing related reports in both French and English;
 - e. Qualitative and quantitative field surveys;
 - f. Experience in conducting large regional projects.

The evaluating institution must have the necessary technical competence and experience to assess the quality of the technical assistance provided under this project. Details of a core evaluation team are expected to be included in the bidding proposal with CVs and qualifications clearly outlined. An evaluation team leader will need to be nominated by the evaluating institution to act as the focal point to interact with the UNIDO Evaluation Group as managers of the evaluation exercise.

The above-mentioned functions, competencies and skills may be distributed among several persons in the evaluation team. Team members may be located in different countries but an effective coordination mechanism will have to be demonstrated.

Evaluation team members must be independent and not have been involved in the formulation, implementation or backstopping of the project.

The evaluation team leader will be responsible for elaboration of an evaluation methodology, including the design of mission plans, field surveys and elaboration of questionnaires; guiding the evaluation team and their staff throughout the exercise; analysis of survey results; gathering of complementary information from project staff, collaborators and stakeholders through field visits, telephone interviews and other means; and preparing a presentation of conclusions and recommendations as well as a final evaluation report in English.

The UNIDO Evaluation Group will be responsible for the quality control of the evaluation process and report. They will provide inputs regarding findings, lessons learned and recommendations from other evaluations, ensuring that the evaluation report is in compliance with established evaluation norms and standards and useful for organizational learning of all parties.

The project office in Vienna and their field-based project teams will logistically and administratively support the evaluation team to the extent possible. However, it should be understood that the evaluation team is responsible for its own arrangements for transport, lodging, security etc.

Language requirements

Local interviews and surveys will be conducted in English or French, depending on the country.

All data and interview reports must be translated into English.

Performing a linguistic quality control of all interview reports is part of the scope of contract. The evaluation report must be delivered in English.

Consultations

The mission will maintain close liaison with UNIDO field offices while on mission in Africa, as well as with national and international project staff. Although the mission should feel free to discuss with the authorities concerned anything relevant to its assignment, it is not authorized to make any commitments on behalf of any governments, the donor, or UNIDO.

Deliverables

1. Inception report, outlining a detailed evaluation methodology;
2. Initial and final evaluation survey reports (English & French, as appropriate);
3. Draft evaluation report (English);
4. Copies of all presentations made in Vienna by the evaluating institution;
5. Final evaluation report (English).

The final evaluation report shall be completed and delivered in three bound copies and one electronic copy by the end of March 2012. The reporting language will be English.

The report must follow the structure given in annex 1. The executive summary, recommendations and lessons learned shall be an important part of the presentations to be prepared for debriefing sessions in Vienna.

Draft reports submitted to UNIDO Evaluation Group are shared with the corresponding Programme or Project Officer(s) for initial review and validation. They may provide feedback on any errors of fact and may highlight the significance of such errors in any conclusions. The consultation also seeks agreement on the findings and recommendations. The evaluators will take the comments into consideration in preparing the final version of the report.

The evaluation will be subject to quality assessments by UNIDO Evaluation Group. These apply evaluation quality assessment criteria and are used as a tool for providing structured feedback. The quality of the evaluation report will be assessed and rated against the criteria set forth in the Checklist on evaluation report quality (annex 2).

The bidding process and criteria for assessment of bids

The assessment of bids received for the evaluation will be based on the following criteria:

1. The institution's years of working experience in similar types of projects and/or evaluations (minimum three years; maximum score: 10);
2. Experience in working with the private sector in the African context (minimum three years; ; maximum score: 10);
3. Experience of working with UN organizations in the region (minimum three years; ; maximum score: 5);
4. At least two evaluation projects completed in the last five years in the region (maximum score: 10);
5. Competence and experience of the evaluation team members, based on criteria outlined under 'Services required' section above (maximum score: 20);
6. Demonstrated adherence to the TOR (maximum score: 10);
7. Quality of the proposal for the conduct of the evaluation (maximum score: 20);
8. Assurances to initiate the exercise as early as possible in November/December 2011, and to complete the full evaluation task within a maximum period of five months (maximum score: 5);
9. The scoring system used for assessing bids will be in line with the above criteria with a maximum score of 100. Any bid with a score below 50 will be rejected automatically.

Annex B: Interview Guidelines

Evaluation – Survey of Enterprises in Selected ACP Regions

Workstream 1a – Meetings with UNIDO Project Implementation team & Stakeholders

Questionnaire

Respondent Details	
Respondent name:	
Respondent title (Dr, Mr, Mrs, etc):	
Respondent organization:	
Investor survey role / title:	

By way of introduction, the interviewer will explain Frost & Sullivan’s purpose and involvement in the evaluation of the 2009 Africa Investor Survey project, although many of the respondents will be familiar with the objectives of the interview.

Introduction – About the Respondent

1. What was your exact role and involvement in the project?
2. Were you engaged in the project from the start? If not – when did you commence? Did you replace a former project member?
3. Can you describe in your own words the fundamental goals of the project?

Project Identification & Formulation

4. What previous UNIDO (and other) surveys were used to scope the process for this project? (Aim: did the team take on board lessons learned from earlier projects?)
5. Was there any specific analysis/consideration/collaboration of other UNIDO projects and teams included in the design and set up of this project?

6. Were there any specific problem/risk areas identified at project initiation? How did the manager and/or the team decide to prepare for them?
7. Can you please describe the team set-up, the key decision makers and their roles?
8. Who were the main stakeholders in this project?
9. I would like to understand which project management tools were used during this project. Can you please explain how your individual work breakdown schedule and your milestone plan were structured?
10. How did your role, responsibilities and milestones evolve over the project lifecycle?
11. How were weekly team meetings structured? (Aim: understand if the team had clear management inputs, a set of clear individual activities and an understanding of required outputs within a given time frame without losing the bigger picture – the project objectives and its beneficiaries).
12. Which team members were involved in the design of the survey questionnaire and at what stage of the project was it developed?
13. How would you evaluate ex post the clarity and logical consistency of the design of the questionnaires?
14. Every project is monitored throughout its life cycle. Who was part of the project monitoring team on this project and how did the team interact with you?
15. How was progress communicated to donors and stakeholders?

Relevance

16. If you look at the project as a whole, could you please rate on a scale of 1-5 (with 1 being absolutely irrelevant) how relevant the project approach and its outputs/outcomes are to:
 - a. The investment needs and economic priorities of countries surveyed.
 - b. Promoting local and foreign investment.
 - c. The needs and priorities of different categories of enterprises such as domestic, foreign, large, medium, small etc.
 - d. The needs and priorities of host institutions selected for managing the survey.
(The interviewer will check in detail for concrete country and company examples).
17. If you now consider the questionnaires used in this survey, could you please rate on a scale of 1-5 (with 1 being absolutely irrelevant) how relevant their design and content was to:
 - a. The investment needs and economic priorities of countries surveyed.
 - b. Promoting local and foreign investment.

- c. The needs and priorities of different categories of enterprises such as domestic, foreign, large, medium, small etc.
 - d. The needs and priorities of host institutions selected for managing the survey.
(The interviewer will check in detail for feedback from the responded in order to understand if the specifics of individual countries/regions and various categories of enterprises were kept in mind during the design of the questionnaire and the actual field work).
18. Can you please expand on which criteria were used to select target companies?
19. Who are the beneficiaries or targets of the initiative? Who are the individuals, groups or organizations, whether targeted or not, that benefit directly or indirectly from the development initiative?

Efficiency of implementation

20. I understand that the project was extended by 24 months and received additional funding. Could you please point out which to your opinion were the key contributing factors to the project extension? (interviewer to check in detail for factors - and by country if applicable - as discussed in Vienna and their exact impact both on time and cost):
- a. *Business Directory*
 - b. *UNIDO procurement office*
 - c. *Manual checking of all questionnaires in HQ*
 - d. *Complicated questionnaires? (allowed mistakes)*
 - e. *Logic design of questionnaire? (too many open ended questions)*
 - f. *Length of questionnaires?*
 - g. *Changes in CTL (Nigeria 5 different ones?)*
 - h. *Changes in enumerator teams*
 - i. *Lack of collaboration of local authorities?*
 - j. *In-house development of software versus purchase of readymade solution?*
 - k. *Project management?*
 - l. *Overall inexperience of enumerators?*
 - m. *Quality of training received by enumerators?*
 - n. *Necessity of procuring laptops to enumerators?*
 - o. *Selection criteria of companies: how were target companies selected, what criteria were used for prioritization of various company types and sectors? How were they approached? Was this effective and efficient?*

- p. Get an understanding of the management arrangements in each country – was the set up of the Host Institutions, CT and country enumerators correct and efficient?*
21. To your opinion, which of the above factors should have been foreseen at project initiation, which ones could not have been foreseen? (Risk Management).
 22. Which measures were taken once every single of the above challenges manifested itself?
 23. Who was informed, who took the decision to take counter-measures? Where counter-measures appropriate? If yes why? If no, why not?
 24. How were changes approved and documented during the project set-up and implementation phases?
 25. Was the programme or project implemented in the most efficient way compared to alternatives?
 26. What stage would you consider the “implementation” of the project now? (In terms of the platform, SANG, IPAs, any others?).
 27. Do you think the incentive offered to respondents (in the form of access to the platform) was sufficient in attracting a good data sample? Was there any other incentive or benefit statement used to ensure collaboration?
 28. How did you perceive the contractual elements of the project in each country in terms of support internally, and was a common practice adhered throughout contracting external suppliers in each country?
 29. Can you please rate on a scale of 1-10 (with 1 being extremely poor) of the following factors (interviewer to check every single factors in view of further quantification):
 - a. Availability of funds.
 - b. Quality and timeliness of input delivered by both UNIDO HQ and Governments as compared to the work plans.
 - c. Managerial work, support and efficiency.
 - d. Adequacy of monitoring and reporting.
 - e. Extend of national support and commitment.
 - f. Quality and quantity of administrative and technical support provided by UNIDO.

Effectiveness

30. Can you please rate on a scale of 1-10 (with 1 being extremely poor) of the following factors (interviewer to check every single factors in view of further quantification):
 - a. Quality and utility of manuals, handbooks and guidance notes.
 - b. Training and training material.

- c. Promotional material.
 - d. Advocacy initiatives (media?).
 - e. CT skills.
 - f. Measures put in place for gaining cooperation of local enterprises and associations.
 - g. Reliability of data collected.
31. How strong was the impact of the above factors on the achievement or non-achievement of the core project objectives?

Impact & Outputs

32. What has happened as a result of the programme or project?
33. What real difference has the activity made to the beneficiaries?
34. How many people have been affected?
- h. Direct (Surveyed, Informed).
 - i. Indirect (Marketing/launch events).
35. How has the initiative been marketed and promoted in the countries?
36. What would you consider to be the main factors that made/will make the project successful?
37. To what extent are key cross-cutting issues and UN values intended to be mainstreamed and addressed in the design, implementation, and results of this project?

Sustainability

38. To what extent do you expect will the benefits of the project continue after donor funding ceased?
39. Who will be the main promoter of the project benefits and how will he/she/they ensure sustainability?

Africa Investor Report

40. Who selected the content for the report and if you know: based on which criteria?
41. What is the key take away from the report? What are the key conclusions?
42. Which areas are well covered in the report and conversely: which areas would you have liked to be analyzed more in detail?

43. Do you consider the report in its current form to be relevant in the long term? What updates would be provided, or changed methodology/content going forward?
44. Gender Analysis – why does it not cover male vs. female investors, respondents?
45. Environmental aspects – was any green travel plan considered as part of the survey, or were any environmental aspects/concerns raised by investors/survey respondents?

Project recommendations & lessons

46. How can the project be improved for the next phase? Please be specific.
47. What mechanisms would you put in place to avoid challenges experienced in the project?
48. Are there additional data points that you think should be collected to further promote foreign and local investment? If yes, what are these data points?
49. Are there additional data points that you think should be collected to further promote foreign and local investment or to further reduce poverty? If yes, what are these data points?
50. In terms of the country-based implementation team structure, would you make any structural changes to the structure that was used in the project? If yes, why?

Thank you very much for your time.

Annex C: Evaluation Survey Questionnaires

Evaluation – Survey of Enterprises in Selected ACP Regions

Workstream 1b – Meetings with National Associations Involved in Africa Investor Survey

Respondent Details	
Respondent name:	
Respondent title (Dr, Mr, Mrs, etc):	
Respondent organization:	
Investor survey role / title:	

By way of introduction, the interviewer will explain Frost & Sullivan’s purpose and involvement in the evaluation of the 2009 Africa Investor Survey project. The aim and objectives of the evaluation will be explained to the respondent and the value of their feedback emphasised in terms of influencing the effectiveness of the second phase of the project. In addition, it will be communicated to the respondent that all information provided will be kept confidential.

Introduction

1. Please can you explain the role you play in your country’s investment promotion community?
2. Please explain how you were involved in the 2009 Investor Survey project? (hereafter referred to as “the project”).
3. What was your specific role in the project?
4. Did your role change during the project? If yes, please explain why and how it changed.

Country specific Investment Promotion Landscape

5. Broadly speaking, how is investment typically promoted in your country? What are the common mechanisms used to promote local and foreign investment?

6. What are the investment requirements within your country? Are there specific sectors that require either local or foreign investment to encourage their growth?
7. What are the challenges facing investment promotion in your country?
 - a. How do you think these investment challenges could be overcome?
 - b. Are you aware of any local or foreign initiatives to overcome these challenges?

Project identification and formulation

8. When were you first aware of the project and when did you get involved?
9. At your point of involvement in the project how developed was the project? How long had it been running?
10. Were you able to provide input into the project approach and design or had these already been developed at your point of involvement?
11. Do you feel the project aim and objectives were aligned with the requirements of investment promotion in your country? Please explain why.

Project relevance and ownership

12. The project had a specific approach; it utilized a specific survey questionnaire and has now delivered some tangible outputs. Have you seen any of the project outputs (a report or the online Investment Monitoring Platform)?
 - a. Do you feel the project approach was relevant, given the structure of your economy and the types of businesses prevalent in your country? Please explain your answer.
 - b. Do you feel the survey questionnaire was relevant, given the investment needs and economic priorities of your country? Please explain your answer.
 - c. If you have seen the project outputs, do you feel they are relevant to your country's investment needs and economic priorities? Please explain your answer.
13. The project was run across 19 African countries. Do you feel that the project's design, implementation and approach were relevant to the specific context of your country and its enterprises? Please explain your answer.
14. The companies that were targeted in the project, do you feel they were relevant given the aim and objectives of the project? Please explain your answer.

15. How involved were you in the development of the project approach and the questionnaire development? Are you aware of any other people from your country that were involved in the development of the above?

Efficiency of implementation

16. How well do you think the project was implemented in your country?
- a. Please rank the level of implementation effectiveness on a scale as outlined below:
 - i. Great implementation
 - ii. Good implementation
 - iii. Ok implementation
 - iv. Poor implementation
 - v. Bad implementation
17. Do you feel you received adequate support (training, equipment, expertise) from UNIDO on the project?
18. Do you feel the project was implemented in a timeout manner in relation to the project work plan provided? If not, please explain why.
19. What challenges were faced by the implementation team when running the project in your country?
- a. Could these challenges have been foreseen and avoided at the beginning of the project?
 - b. How were the projects challenges overcome?
 - c. Did these challenges impact the project timeline at all?

Effectiveness & Project Results

20. As per question 13, have you seen any of the project outputs (the summary report or the Investment Monitoring Platform)? If the answer is **yes** proceed to 21a, if **no** proceed to questions 22.
- a. Do you feel these project outputs will help promote investment in your country?
 - b. How could the project outputs support investment in your country?
 - c. Do you know of any examples where the project output has promoted investment (local or foreign) in your country?
 - d. How would you rank the usefulness of the project data (from the Investment Monitoring Platform) on the following scale:
 - i. Very useful
 - ii. Fairly useful
 - iii. Useful

- iv. Some of the data was useful
- v. None of the data was useful
- e. From question d above, please explain your answer.

Project Recommendations

- 21. How can the project be improved for the next phase? Please be specific.
- 22. What mechanisms would you put in place to avoid challenges experienced in the project?
- 23. Are there additional data points that you think should be collected to further promote foreign and local investment? If yes, what are these data points?
- 24. In terms of the country-based implementation team structure, would you make any structural changes to the structure that was used in the project? If yes, why?
- 25. How sustainable do you feel the overall project is? Once UNIDO has completed the project do you feel the initiative will continue without their input?

Evaluation of UNIDO's Africa Investor Survey 2010/11

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Workstream 2 – Online Survey

Questionnaire

Interview Numbers and Type of Respondent

Country	Total
Burkina Faso	TOTAL: 650 interviews
Burundi	
Cameroon	
Cape Verde	
Ethiopia	
Ghana	
Kenya	
Lesotho	
Madagascar	
Malawi	
Mali	
Mozambique	
Niger	
Nigeria	
Rwanda	
Senegal	
Tanzania	
Uganda	
Zambia	

Interview numbers are minimum numbers planned for and on a best effort basis only.

Final distribution achieved will be dependent on number and quality of addresses and response rates.

Respondent Criteria:

- Having received an invite to participate in the UNIDO Africa Investor Survey, conducted in 2010/2011

Questionnaire Structure:

Texte in black:	Questionnaire
[Numbers in brackets]	Codes for data set, will not be shown on interviewer screen nor read out to respondents
Text in blue:	Filter instructions
Text in red:	Programming instructions
Highlight in yellow	Changes
Highlight in Pink	Last minute changes

.....
Introduction

Welcome to our Internet Platform

Thank you for your time.

On behalf of United Nations Industrial Development Organization (UNIDO), we kindly ask you to take part in this study that aims to evaluate UNIDO's Regional Programme for Investment Promotion in Africa, and its survey of companies over 2010/11, in order to capture your opinion and perception of the programme results.

.....
This survey is being conducted in 19 African countries at company level in order to gather information directly from business owners and senior managers about their assessment of UNIDO's project results and benefits.

The survey is split into three sections:

- Section 1:** 2010/2011 Survey Experience
- Section 2:** Your evaluation of the survey outcome
- Section 3:** Final questions

The data you provide will enable analysts to evaluate the project's relevance and effectiveness.

The results of this survey will be exclusively reported in an **anonymous form**. That means: when looking at the results **nobody outside of Frost & Sullivan can find out which answers have been made by whom**. Frost & Sullivan will absolutely not release any data that would identify you to a third party.

Your participation is **voluntary**. There will be **no disadvantages**, if you do not participate. You may answer as many questions as you like.

Please note that you are able to participate in the survey in multiple sessions by reusing your log-in details. You will be routed automatically to the question you stopped at.

Thank you very much for your time and cooperation!

.....
TERMINATION TEXT

Given the experience you have described, no further questions are required. We thank you for your time, and look forward to your participation in future surveys.

Section 1: Screening Questions

SC01. Did you participate in the UNIDO Investor Survey, which was conducted over 2010 / 2011?

UNIDO's investor surveys are a part of the AfrIPANet initiative. The 4th survey was conducted over 2010/11 in 19 countries across the African continent. About 6,500 companies, both foreign and domestic investors from the service and manufacturing sectors participated, hence, contributing to a better understanding of investment trends and their developments over time in Africa.

- [1] Yes
- [2] No
- [3] I cannot remember
- [99] Don't know

Section 1: Introductory Questions

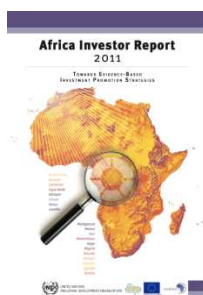
All

MULTIPLE RESPONSES

SC02. Have you seen or received any outcomes related to the 2010 / 2011 Survey yet?

Please select all relevant outcomes you have seen or received

- [1] I have seen / received the 'Africa Investor Report 2011'



- [2] I have not seen / received the 'Africa Investor Report 2011' yet
- [3] I have received access to Investment Monitoring Platform



- [4] I have not received access to Investment Monitoring Platform yet
- [5] I was introduced to the “Africa Investor Report 2011” at a launch event
- [6] I was introduced to the Investment Monitoring Platform at a launch event
- [99] I cannot remember

Program: Terminate

Create variable:

SC02 A = [1] if SC01 = [3] or [99] AND SC02 = [2] only or [4] only or ([2] AND [4]) only or [99]

SC02 A = [2], all other

Section 1: Introductory Questions

Filter; IF SC02 = [5] or [6]
SINGLE RESPONSE

SC03. You mentioned that you participated in a UNIDO launch event. Where did this UNIDO launch event take place?

- [1] Kenya, Nairobi
- [2] Tanzania, Programme
- [3] Uganda, Kampala
- [4] Ghana, Accra
- [5] Ethiopia, Addis Ababa
- [6] Madagascar, Antananarivo
- [7] Mali, Bamako
- [8] Cape Verde, Praia
- [9] Rwanda, Kigali
- [10] Cameroon, Yaoundé
- [11] Burundi, Bujumbura
- [12] China, Xiamen
- [99] Don't know

Section 1: Introductory Questions

Filter; IF SC02 = [5] or [6]

SINGLE RESPONSE

SC04. How would you rate the launch event that you attended?

- [5] Excellent
- [4] Very good
- [3] Good
- [2] Acceptable
- [1] Bad

Section 1: Introductory Questions

Filter; IF SC02 = [5] or [6]

SINGLE RESPONSE

SC05. Which of the following statement explains how relevant the launch event was to you and your needs?

- [5] Completely relevant
- [4] Somewhat relevant
- [3] Neither relevant nor irrelevant
- [2] Somewhat irrelevant
- [1] Completely irrelevant
- [99] Don't know

Section 1: Introductory Questions

Filter; IF SC02 = [5] or [6]

SINGLE RESPONSE

SC06. Did the launch leave you with the impression of unique or new insights?

- [1] Yes
- [2] No

- [99] Don't know

Section 1: Introductory Questions

Filter; IF SC06= [1]

SINGLE RESPONSE

SC07. You mentioned that the launch left you with the impression of unique or new insights?

Please describe these impressions as detailed as possible.

Section 2: Background Questions

Section 2: Background Questions

All

MULTIPLE RESPONSES

RANDOMISE

Q1. In addition to the 'Africa Investor Report 2011' and the Investment Monitoring Platform, UNIDO offers further support programmes as part of the Regional Programme for Investment Promotion in Africa. Which, if any, of the following UNIDO support programmes are you aware of? Please select all you are aware of:

- [1] UNIDO SPX, Subcontracting and Partnership Exchange (SPX) Programme:

More than twenty years ago, UNIDO created the Subcontracting and Partnership Exchange (SPX) system to help local firms in developing countries to identify opportunities for supplying components for large company clients).

Part of the UNIDO SPX programme is also a Benchmarking Services. The Benchmarking Service involves actively engaging with the buying departments of large companies, identifying and mapping their requirements. A needs analysis is then carried out starting from this thorough understanding of their procurement strategies and plans. Potential local suppliers, in turn, complete a self-assessment exercise using a UNIDO benchmarking tool.

- [2] IMP Business Directory:

The IMP Business Directory, integrated into the Investment Monitoring Platform (IMP), displays company details that the surveyed firms want to be displayed. Generally this

comprises contact details, general company information, product information, a contact person and some basic operational details such as turnover and number of employees

- [3] Training on how to use the IMP for research and analysis
- [4] I am not aware of any of these programmes
- [99] Don't know

Section 2: Background Questions

IF Q1 = [1] or [2] or [3]
MULTIPLE RESPONSES
RANDOMISE

Q2. Which of the following UNIDO support programmes have you ever used?

Please select all you ever have used

- [1] <insert if Q1 = [1] >
- [2] <insert if Q1 = [2] >
- [3] <insert if Q1 = [3] >

Section 2: Background Questions

All
MULTIPLE RESPONSES
RANDOMISE

Q3. Which benefits do you perceive for you and your organization of the UNIDO

African Investor Survey Programme

Please select all you are aware of

- [1] Being listed in a pan African Business Directory
- [2] Having a closer link to Investment Promotion Agencies and their services
- [3] Being able to monitor/understand what other companies are doing in my sector/region
- [4] Having access to a trusted and user friendly platform of information operated by UNIDO
- [5] Being able to connect to other businesses and companies within my sector/region

- [6] Compare my performance with similar firms in my sector
- [7] Other benefits, please specify: _____
- [99] Don't know

Section 3: Survey Experience

Section 3: Survey Experience

Filter: IF SC01 = [2] (no participation)

SINGLE RESPONSE

RANDOMIZE

Q4. Why did you not participate in the UNIDO Investor Survey 2010 / 2011?

- [1] I did not receive any invitation to the survey
- [2] I did not see the benefit of why I should participate
- [3] I am not willing to share any detailed company information
- [4] I did not have any time available at the time of the survey
- [5] I wanted to participate but I was never contacted again to schedule the interview
- [6] I wanted to participate but the enumerator/interviewer did not show up at the time scheduled for the interview
- [7] Other reason, please specify: _____
- [99] Don't know

Section 3: Survey Experience

IF SC01 = [1] (survey participation)

SINGLE RESPONSE

Q5. Overall, how interesting did you find it to participate in the UNIDO Africa Investor Survey?

- [5] Extremely interesting
- [4] Very interesting
- [3] Interesting
- [2] Somewhat interesting
- [1] Not interesting

Section 3: Survey Experience

IF Q5= [5] or [4] (extremely interesting, very interesting)

OPEN TEXT

Q6. You mentioned that the survey participation was <insert Q5 = [5]
or [4]> to you.

Why was it so interesting to you?

Please answer as detailed as possible.

Section 3: Survey Experience

IF Q5= [1] (not interesting)

OPEN TEXT

Q7. You mentioned that the survey participation was not interesting
to you.

Why was it not interesting to you?

Please answer as detailed as possible.

Section 3: Survey Experience

IF SC01 = [1] (survey participation)

SINGLE RESPONSE

Q8. How well do you remember the survey experience?

- [5] I remember it extremely well
- [4] I remember it very well
- [3] I remember it well
- [2] I somewhat remember it
- [1] I don't remember it

Section 3: Survey Experience

IF SC01 = [1] (survey participation)

SINGLE RESPONSE

Q9. How satisfied are you with the overall performance of the execution of the UNIDO Africa Investor Survey 2010 / 2011?

By performance of execution of UNIDO Africa Investor Survey 2010 / 2011 we mean the entire process of the survey including its announcement, the interview conduct as well as the feedback after the survey.

- o [5] Extremely satisfied
- o [4] Very satisfied
- o [3] Satisfied
- o [2] Somewhat satisfied
- o [1] Not satisfied

Section 3: Survey Experience

IF Q9 = [5] or [4] or [3] (extremely satisfied, very satisfied, satisfied)
OPEN TEXT

Q10. Why are you <insert Q9 = [5] or [4] or [3]> with the execution of the UNIDO Africa Investor Survey 2010 / 2011?

Please answer as detailed as possible.

Section 3: Survey Experience

IF Q9 = [1] (not satisfied)

OPEN TEXT

Q11. Why are you not satisfied with the execution of the UNIDO Africa Investor Survey 2010 / 2011? What could be done better?

Please answer as detailed as possible.

Section 3: Survey Experience

IF SC01 = [1] (survey participation)
DROP DOWN MENU

Q12. When was the interview conducted?

Please provide your answer by selecting year and month from the drop down list.

- o [A] Year _____
- o [B] Month _____
- o [99] Don't know

DROP DOWN LISTS

- o [1] 2009
- o [2] 2010
- o [3] 2011

- o [1] January
- o [2] February
- o [3] March
- o [4] April
- o [5] May
- o [6] June
- o [7] July
- o [8] August
- o [9] September
- o [10] October
- o [11] November
- o [12] December

Section 3: Survey Experience

IF SC01 = [1] (survey participation) OR Q4 = [5] or [6] (wanted to participate but did not happen)

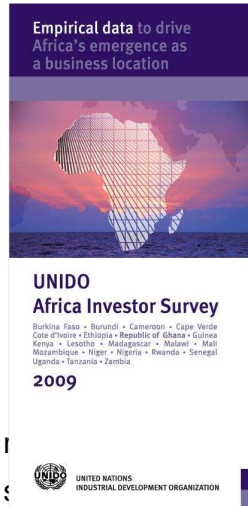
MULTI RESPONSE

RANDOMIZE [1] to [5]

Q13. How were you invited to participate in the UNIDO Africa Investor Survey?

Please choose all that apply.

- [1] I received a letter
- [2] I received an e-mail
- [3] I received an info brochure



- [4] I received an announcement by phone call
- [5] I saw an announcement in the press
- [6] I did not receive any announcement at all, the enumerator/interviewer just dropped in
- [7] Other, please specify: _____
- [99] Don't remember

Section 3: Survey Experience

IF Q13 = [1] or [2] or [3] or [4] or [5] OR Q4 = [5] or [6] (wanted to participate but did not happen)

MULTIPLE RESPONSES
RANDOMIZE [1] to [6]

Q14. Who or which institution made the announcement of the survey?

Please choose all that apply.

- [1] UNIDO, UNIDO representative, UNIDO country manager
- [2] National statistical office
- [3] Private industry chamber
- [4] Investment promotion agency
- [5] Ministry/(-ies)
- [6] Other organization, please specify: _____

- [7] Enumerator / interviewer
- [99] Don't remember

Section 3: Survey Experience

IF Q14= [5] (announcement by ministry)

MULTIPLE RESPONSES

RANDOMIZE [1] to [8]

Q15. Which ministry (-ies) actually made the announcement for the survey?

Please choose all that apply.

- [1] Ministry of Planning/Development
- [2] Ministry of Industry
- [3] Ministry of Communications and Information
- [4] Ministry of Trade
- [5] Ministry of Regional Development
- [6] Ministry of National Service
- [7] Ministry of the Interior/Home Affairs
- [8] Prime Minister's office
- [9] Other ministry, please specify: _____
- [10] None, to my knowledge
- [99] Don't remember

Section 3: Survey Experience

IF SC01 = [1] (survey participation)

SINGLE RESPONSE

Q16. In how many sessions was the interview for the survey conducted?

- [1] in one session
- [2] in two sessions
- [3] in three sessions
- [4] in four or more sessions
- [99] Don't know

Section 3: Survey Experience

IF SC01 = [1] (survey participation)

SINGLE RESPONSE

Q17. How easy or difficult was it to complete the UNIDO Africa Investor Survey questionnaire?

- [5] Very easy
- [4] Easy
- [3] Neither easy nor difficult
- [2] Difficult
- [1] Very difficult
- [99] Don't know

Section 3: Survey Experience

IF Q17 = [1] or [2] (difficult or very difficult)

MULTIPLE RESPONSES

RANDOMIZE [1] to [4]

Q18. Why did you find it <insert Q17 [1] or [2]> to complete the questionnaire?

Please choose all that apply

- [1] Structure of questionnaire was difficult to follow
- [2] Questions asked were difficult to understand
- [3] Questions asked very detailed, so that I could not answer them top of my head
- [4] To answer to the questionnaire took too long
- [5] Enumerator/interviewer could not explain the questions
- [6] Other, please specify: _____
- [99] Don't remember

Section 3: Survey Experience

IF SC01 = [1] (survey participation)

SINGLE RESPONSE

Q19. The UNIDO Africa Investor Survey consists of two parts: Part 1 covers Company Profile and Investor Perceptions and Part 2 is asking for information from the Company's Accounts.

Did you respond to both parts of the survey or did you split with a colleague to respond to the survey?

- o [1] I responded to both parts of the questionnaire
- o [2] I responded to the first part (Company Profile and Investor Perceptions) of the questionnaire and someone else in the company to the second part (information from the Company's Accounts)
- o [3] I responded to the second part (information from the Company's Accounts) of the questionnaire and someone else in the company to the first part Company Profile and Investor Perceptions)
- o [99] Don't remember

Section 3: Survey Experience

IF SC01 = [1] (survey participation)

SINGLE RESPONSE PER ROW

Q20. How satisfied were you with the enumerator/interviewer who conducted the interview?

	Extremely satisfied [5]	Very satisfied [4]	Satisfied [3]	Somewhat satisfied [2]	Not satisfied [1]
[A] Enumerator/interviewer was professional					
[B] Enumerator/interviewer was friendly					
[C] Enumerator/interviewer explained background of the survey programme very well					
[D] Enumerator/interviewer					

r was reliable/came at time agreed					
[E] Enumerator/interviewer walked me through the interview very well					

Section 3: Survey Experience

All

MULTIPLE RESPONSES

RANDOMIZE [1] to [6]

Q21. What is your understanding of the objectives of the UNIDO African Investor Survey programme?

Please choose all that apply.

- [1] Identify service expectations from local institutions
- [2] Investigate impact of policy on investors' operations, motivations to invest and the performance of their businesses
- [3] Highlight varying effects of investors on the local economy
- [4] Understand investors' interactions with other local and international enterprises
- [5] Determine investors' growth levels and future projections
- [6] Generate investment opportunities at national and regional level
- [7] None of the above
- [99] Don't know

Section 4: Evaluation of outcome of the survey

Filter: If SC02 = [3] (I received access to Investment Monitoring Platform)

SINGLE RESPONSE

Section 4: Evaluation of outcome of the survey

Q22. You mentioned that you have received access to the Investment Monitoring Platform. How useful is the tool to you?

- [5] Extremely useful
- [4] Very useful
- [3] Useful
- [2] Somewhat useful
- [1] Not useful

Section 4: Evaluation of outcome of the survey

Filter: If SC02 = [3] (I received access to Investment Monitoring Platform)

MULTIPLE RESPONSES

RANDOMIZE [1] to [6]

Q23. Which of the following activities/services does the Investment Monitoring Platform assist you with?

Please choose all that apply.

- [1] Provide detailed information on foreign investors and domestic enterprises in sub-Saharan Africa
- [2] Access the survey data base, the analysis of investment trends and business information at sectoral and sub-sectoral levels
- [3] Participate in public-private dialogue
- [4] Form new national and international business partnerships
- [5] Utilise the survey data to identify business opportunities, support business operations and re-assess investment strategies
- [6] Raise pertinent issues for the attention of intermediary institutions and policy makers
- [7] None of the above
- [99] Don't know

Section 4: Evaluation of outcome of the survey

Filter: If SC02 = [1] (I received 'Africa Investor Report')

SINGLE RESPONSE

Q24. You mentioned that you had received the 'Africa Investor Report 2011'. How useful is the report to you?

- [5] Extremely useful
- [4] Very useful
- [3] Useful
- [2] Somewhat useful
- [1] Not useful

Section 4: Evaluation of outcome of the survey

Filter: If SC02 = [1] (I received "Africa Investor Report")

MULTIPLE RESPONSES

RANDOMIZE [1] to [4]

Q25. Which topics of the 'Africa Investor Report' did you find interesting? Please choose all that apply.

- [1] Characteristics and origins of investments in sub-Saharan Africa, and their impact
- [2] Analysing the impact of various types of investment.
- [3] Information on IPAs (Investment Promotion Agencies) and their services, opportunities and importance
- [4] Africa Investor Survey methodological information, e.g. sample composition, survey implementation and data quality
- [5] None of the above
- [99] Don't know

Section 5: Final Questions

Section 5: Final questions

All

SINGLE RESPONSE

Q26. How likely are you to participate in the UNIDO survey programme next time?

- [5] Very likely
- [4] Somewhat likely
- [3] Possibly
- [2] Rather unlikely
- [1] Very unlikely

Section 5: Final questions

All

SINGLE RESPONSE

Q27. How likely is it that you would recommend participating in the UNIDO survey programme to your colleagues, business partners and friends?

Extremely likely

Extremely unlikely

10	9	8	7	6	5	4	3	2	1	0
[10]	[9]	[8]	[7]	[6]	[5]	[4]	[3]	[2]	[1]	[0]

Section 6: Firmographics/ Demographics

Section 6: Firmographics/ Demographics

All

SINGLE RESPONSE

Q28. What is the bandwidth of your internet connection?

- [1] up to 500 KB
- [2] 500kB to 1 MB
- [3] 1 MB to 2 MB
- [4] 2 MB to 3 MB
- [5] 3 MB to 5 MB
- [6] 5 MB to 10 MB
- [7] 10 MB or more
- [99] Don't know

All

SINGLE RESPONSE PER ROW

RANDOMISE [A] to [F]

Q29. Which, if any, best describes the situation of your internet connection?

	Never [1]	Several times per day [2]	Daily [3]	At least once per week [4]	Less than once a week [5]
[A] Power Failure					
[B] Very slow connection					
[C] Not able to download large files of more than 2 MBs					
[D] No stable connection for more than 15 minutes					
[E] Unable to use internet at all					

Section 6: Firmographics/ Demographics

All

SINGLE RESPONSE

Q30. What is your gender?

- [1] male
- [2] female

Section 6: Firmographics/ Demographics

All

SINGLE RESPONSE

Q31. How many full time employees does the organization you work for have in your country?

- [1] 1 to 9
- [2] 10 to 49

- o [3] 50 to 99
- o [4] 100 or more employees
- o [99] Don't know

Section 6: Firmographics/ Demographics

All

SINGLE RESPONSE

Q32. Please select the sector that best describes your company's main business activity?

- o [1] Agriculture, forestry, and fishery
- o [2] Mining & quarrying
(including oil and gas)
- o [3] Manufacturing
(including food & beverage, tobacco products, textiles, garments, leather, wood & wood products, paper, publishing and printing, coke and refined petroleum, chemicals, plastics and rubber, non-metallic mineral products, basic Metals, fabricated metal Products, machinery & equipment, office and computing, machinery, electronics, radio, TV and communication equipment, medical and optical instruments, watches, motor vehicles and trailers, other transport equipment, furniture, recycling, gas and water supply, construction)
- o [4] Services
(including wholesale, retail, hotel & restaurant, transport & storage, tourism, IT & telecommunications, insurance & banking, real estate, consultancy, education & health)
- o [5] Other

Section 6: Firmographics/ Demographics

All

SINGLE RESPONSE

Q33. What is the current share of foreign ownership in your company?

- o [1] None
- o [2] 1% to 10%
- o [3] 11% to 49%
- o [4] 50% or more
- o [99] Don't know

Section 6: Firmographics/ Demographics

All

SINGLE RESPONSE

Q34. Which country is your company based in?

Please select your country from the list.

- [1] Burkina Faso
- [2] Burundi
- [3] Cameroon
- [4] Cape Verde
- [5] Ethiopia
- [6] Ghana
- [7] Kenya
- [8] Lesotho
- [9] Madagascar
- [10] Malawi
- [11] Mali
- [12] Mozambique
- [13] Niger
- [14] Nigeria
- [15] Rwanda
- [16] Senegal
- [17] Tanzania
- [18] Uganda
- [19] Zambia
- [20] Other

On behalf of the UNIDO we thank you very much for you time and contribution to this evaluation survey.

Annex D: List of Persons Interviewed

Name	Job title/Position in company/organization	Name of company/organization
Mr. Mithat Kulur	Unit Chief	UNIDO Project Management Unit (PMU)
Mr. Tidiane Boye	Industrial Development Officer	
Mr. Cristof Paparella	IS Functional Team leader	
Mr. Stefan Kratzch	Project Manager	
Mr. Christof Yvetot	UNIDO Representative to the EU	UNIDO
Mrs. Ruth Nyakotey	Regional Programme Co-ordinator	UNIDO PMU
Ms. Michaela Fleischer	Intern – Interview Scheduling	UNIDO – previous member of PMU
Mr. Tillmann Guenther	Country Team Leader, Kenya	UNIDO PMU
Mrs. Felix Ugbor	Consultant to UNIDO	UNIDO
Mr. Florian Kulich	Data Analysis Team (Econometric Expert)	University of Vienna (former UNIDO)
Mr. Prof. Peter Buckley	Professor of International Business	University of Leeds
Mr. Zakaria Sbitri	Programme Manager	European Commission
Mr. John J. Kyaruzi	Director of Research & Information Systems	Tanzania Investment Centre, Tanzania
Mr. Tibenda Njoki	Manager	
Mrs. Beatrice Chonjo	Director of Administration and Finance	
Mr. Revocatus Albogast	Manager of Investment Facilitation	
Mr. Saidi Amiri	Manager for P.P.P.	
Mr. Pascal Maganga	Manager Finance & Accounts	
Mrs. Pendo Gondwe	Manager for Public Relations	Tanzania Investment Centre, Tanzania
Mr. Desiderius Narwango	Manager of Lands	
Mr. Gao Ngwirizi	Manager IT	

Mr. Dotto Stanley	Senior Officer Investment Facilitation	
Mr. Alex Mnyani	Legal Officer	
Mr. Faraja Mgwabati	UNCTAD Consultant	
Mrs. Dank el Nkya	UNCTAD Consultant	
Mr. Tillmann Guenther	Country Team Leader (Face to Face and Telephonic interview)	UNIDO
Mr. Gabriel Landa	Funds Manager	Tanzania Private Sector Foundation
Mr. Adam Zuku	Senior Chamber Development Officer	Tanzania Chamber of Commerce, Industry & Agriculture (TCCIA)
Mr. Freddy Matola	Senior Statistician	Tanzania National Bureau of Statistics
Mrs. Joy Sawe	Manager: Industrial & Construction Statistics	
Mr. Ellykedo Ngonyani	Senior Economist	Presidents Office: Planning Commission, Tanzania
Mr. George Makateto	Assistant Director of Industries	Ministry of Industrialisation, Kenya
Eng. John Mosonik	Secretary: Ministry of Industrialisation	
Ms. Caren Mutai	Aftercare Services	KenInvest
Mr. James Musau	Senior Officer: Research & Planning (e-mail interview)	
Mr. Richard Ochieng Bonyo	Director	Progeny International
Mr. Lorenzo Makonnen	Director	
Mr. Gerald Atheru	Dean: School of Business	Kenyatta University
Mr. Paul Sang	Associate Dean: School of Business	
Ms. Lucy Njuguna	Business Development Manager	African Foods & Environmental Concerns

Mr. Evans Muthemba	Head Finance & Administration	Initiatives (AFECI)
Mr. Lawrence Byensi	Executive Director	Uganda Investment Authority, Uganda
Mr. Issa Mukasa	Director IPD	
Dr. Maggie Kigozi	Former Executive Director	
Hon. Dr James Shinyabulo-Mutende	Minister of State for Industry and Technology	Ministry of Industries
Mr .Gideon Badagwa	Executive Director	Private Sector Foundation of Uganda
Ms. Robinah Namirembe	Business Skills Trainer	Private Sector Foundation of Uganda
Mr. Nicholas Okot	Statistics Department	Bank of Uganda
Mr. Male Mukasa	Executive Director	Uganda Bureau of Statistics
Mr. John Mayende	Senior Statistician	
Mr. John Musoke	Senior Statistician	
Mr. Kofi Antiri	Director of Research & Programme Focal Point Officer	Ghana Investment Promotion Centre, Ghana
Mr. Leonardo Lamptey	Country Team Leader, Ghana	UNIDO
Mrs. Evelyn Addei Sarpong	Programme Focal Point Officer	Ghana Chamber of Mines
Mr. Emmanuel Doni-Kwame	Chief Executive Officer	Ghana National Chamber of Commerce and Industry
Dr. Robert Osei	Head of Economic Division	Institute of Statistical, Social and Economic Research
Dr.Charles Ackeh	Research Fellow	
Mr .Frank Van Rompaey	Country Representative	UNIDO
Ms. Hannah Tetteh	Ministry of Trade & Industry	Ministry of Trade & Industry

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