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REPORT: UNIDO-AFRICA INVESTMENT PROMOTION AGENCY NETWORK INAUGURAL MEETING

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UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION Economy Environment Employment

THE UNIDO-AFRICA INVESTMENT PROMOTION AGENCY NETWORK

I. BACKGROUND

Many African countries have established national investment promotion agencies (IPAs) to increase the flow of investment resources into their economies. With the rapid advance of globalization, however, some of these agencies have found themselves confronted with the challenges of complex international marketing and intense competition. Limited financial resources and a lack of skilled staff contribute to the difficultly in meeting these challenges.

In response to some of these problems, UNIDO has taken the initiative to launch the UNIDO-Africa Investment Promotion Agency Network (UNIDO-Africa IPA Network). This Network functions as a working group to explore practical low-cost schemes to improve the effectiveness of its member agencies and to mobilize domestic and foreign investment. Membership to the Network is currently open to IPAs from Sub-Saharan African countries with ongoing Integrated Programmes. However, with the initiation of new integrated programmes, membership will expand. The Network also functions as a resource group to provide guidance in the design of UNIDOás country-level programmes and exists as a permanent platform for training, capacity-building and continuous linkage to UNIDOás worldwide network of Investment and Technology Promotion Offices (ITPOs).

In addition to ongoing contact, the members of this Network meet annually. Each meeting is comprised of three parts: expert group meeting (discussion of issues of common concern and recommendation of active programs for donor funding), capacity-building component (training on specific topics or skills) and an exchange component (to strengthen linkages between IPAs and ITPOs to develop integrated programmes and country-specific promotion campaigns).

II. INAUGURAL MEETING

The Network was officially launched on 20-23 November 2001 in Vienna, Austria. The meeting provided a forum for discussion on the direction for the Network, and also contained presentations on various topical areas. A summary of the meeting follows in chronological order.

A. Summary of Opening Session

Many representatives welcomed UNIDOs initiative to establish the UNIDO-Africa IPA Network and contributed ideas for the future direction and activities of this Network. One suggestion was to generate regional projects and programmes for donor funding. Sub-regional groups should be formed to concentrate on specific issues. There was discussion as to representation of the African private sector on the Advisory Panel. It was suggested that African companies should be included. In addition, banks and other financial institutions should be represented.

The content of the meeting was also discussed, with the suggestion that showcase projects be highlighted at each Network meeting. It was also suggested that in the future, some of the meetings be held in Africa.

* Countries with ongoing integrated programmes include: Burkina Faso, Cameroon, Ethiopia, Ghana, Guinea, Madagascar, Mozambique, Nigeria, Senegal, Uganda, United Republic of Tanzania

In addition, it was determined that all multilateral agencies (FIAS, UNCTAD, MIGA, UNIDO) should work together to reduce inefficiencies and more effectively coordinate their activities. This would assist in the common objective of improving foreign investorás negative perception of Africa, and assist in improving the business environment. IPAs should also look to existing foreign investors for generating new investment. A common platform should also be formed where IPAs work together to find joint solutions. Finally, ITPOs need to ensure follow-up on programmes started with delegates.

B. Expert Group Meeting

UNIDO experts Mr. Bourke and Mr. Daly, both of the Irish Development Agency (IDA) made presentations to the group. Patrick (P. J.) Daly is one of the architects of the IDA which is among those investment promotion agencies whose experiences and remarkable successes fill the literature making up the guidelines for IPAs in general. Mr. Daly was part of the original team of IDA pioneers who transformed Ireland from a largely agricultural economy to an industrial center. He has served as an Executive Director and Board Member of IDA Ireland in top management and overseas offices (Chief Executive Officer, North America, and Director, Europe).

James P. Bourke is Director of Planning, for the Irish Government Agency for the coordination of investment promotion policies. He has extensive experience in the analysis of investment promotion policies and is responsible for conducting regular surveys of investment promotion performance.

A pilot survey of existing foreign investors was developed and administered in four Sub-Saharan African countries (Tanzania, Uganda, Ethiopia and Nigeria). The objective was to test the usefulness of such surveys to gauge investor sentiment, their needs and intentions. Bourke presented the results of the survey and Daly illustrated how such empirical analysis can be used to design and conduct specific activities within an overall promotion strategy. Furthermore, the usefulness of the surveys for benchmarking and ranking of individual IPAs was emphasized. It was also apparent that such surveys could be a powerful tool for extracting forecasts of future foreign investment trends in the region and for pin-pointing the industrial sub-sectors attracting the most investor interest.

PRESENTATIONS:

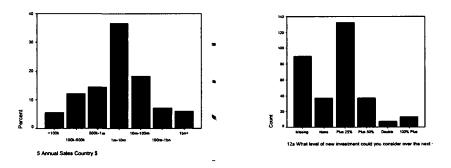
1. Jim Bourke: Initial Survey Results and Future Strategy

The pilot survey was successful in drawing information from participants. At the time of the presentation, 330 of the 500 surveys had been returned, and more were expected. It was expected that the survey was 95% representative of the industrial base and had an accuracy of approximately 95%.

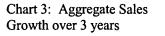
The surveys were generally completed by high-level executives, as 90%

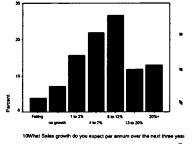
of the questionnaires were completed by Senior Managers, CEOs, Presidents, Directors or Financial Managers. The distribution of sectors was very broad, and therefore representative. In addition, the size distribution of the number of employees in the companies covered a wide range. The distribution of annual sales varied widely (chart 1). Of the companies surveyed, approximately 180 claimed that they would consider an increase of over 25% in investment over the next three years. The anticipated level of investment over the next three years is illustrated in chart 2. This has important implications on the role of an IPA. In addition, sales growth over the next three years was expected to be above 4 to 7% for the majority of companies (chart 3)

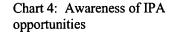
Chart 1: Aggregate Sales investment (country-specific data available) Chart 2: Level of over next 3 years

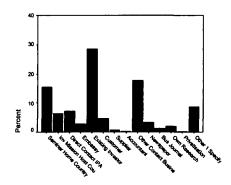


It was found that 70% of the companies were made aware of investment opportunities because of their existing relationships or business contacts. Only 7% were made aware of these opportunities by the IPA (chart 4). Furthermore, it was found that over 80% of those surveyed found the certification process "very helpfulá or of "some helpá, while over 90% rated the certification process "goodá, "very goodá or "excellentá. Ninety percent of those surveyed also rated the expertise of IPA executives as "excellentá, "very goodá, or "goodá.









Finally, 70% rated their investments as performing "well aboveá, "aboveá, or "in line withá expectations in the last three years (chart 5)

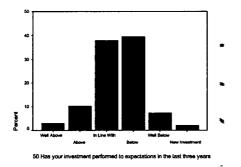


Chart 5: Performance of investments over last 3 years

The survey was considered to be of higher quality than expected in a pilot survey, because it is well represented in all regards. There was a good distribution of investment base in terms of sales, employment and investment. It indicated companiesá willingness to further invest in the four sampled countries. Lessons learned from this test of the questionnaire will lead to more refined future surveys.

These surveys will assist IPAs to develop better relationships and chart opportunities for follow-up in their respective countries. Furthermore, the surveys will assist UNIDO and donor countries to devise future technical assistance programs.

From discussions following the presentation, it was suggested that the survey move away from random sampling, and that stratification be done by sector. The issue of confidentiality was also raised, but over 66% of the companies surveyed were willing to release their identities to the IPAs. Finally, the survey should be done on a recurring basis so as to chart changes over time and determine effects of IPA actions on investor sentiment.

2. Patrick Daly and Designing Cost Efficient Investment Promotion Strategies for IPAsá

Assistance to countries on investment promotion by UNIDO multilateral agencies (MIGA and FIAS of the World Bank Group, UNCTAD, etc) have traditionally relied upon the experiences of agencies such as the IDA. Such agencies have developed proven methodologies and skills to design and execute promotion strategies. However, agencies such as these have had access to resources and staff that have enabled them to achieve their objectives and influence government policies in manners not feasible for African countries.

Mr. Patrick Daly addressed the inappropriateness of drawing too many lessons from successful European IPAs to advise African countries because of the differences in their resources. These issues were discussed in his paper *Designing Cost Efficient Investment Promotion Strategies for IPAs*. The paper addressed the following areas:

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When marketing a country, foreign direct investment is dependent on product, price and promotion. Promotion is the most important to the IPAs. The key tasks of the IPAs include maintaining marketplace presence and profile, gaining influence within the political and administrative system, developing new and extended services to meet needs of the marketplace for FDI, maintaining excellent relationship management with existing clients, and developing a strategic approach to the FDI marketplace.

It is essential that effective networks be set up by the IPAs, as proactive marketing is vital to its success. There is no substitute for physical presence in the marketplace, despite developments in information technology and transportation. Every major city in the world is the object of attention from foreign countries seeking investment. IPAs must learn to capitalize on this. IPAs also need to develop strong links with their respective governments.

IPAs must also introduce Target and Performance Measurement Systems. These act as benchmarks to determine whether projects are being won or lost and whether foreign investment is being successfully recruited. Target setting and performance management have become integral in the way IPAs manage their activities, and this trend will continue.

Several surveys have been undertaken to study the role of IPAs in developing countries. For example, the FIAS Survey reviewed the performance of IPAs in 26 countries in Central and Southeast Asia. It was found that although most countries favored the "one-stop shopá model of an IPA for attracting FDI, they failed to implement this in such a way that the agency achieved its full potential. Furthermore, many IPAs lacked strategic vision towards the marketplace, as well as low government funding. The survey also indicated that the IPAs had little contact with clients once the initial contact process was complete.

UNIDOás pilot survey in 2001 with Nigeria, Uganda, Tanzania and Ethiopia, addressed promotional issues in these countries, and found that there were positive plans for investment by a high proportion of investors in all four countries. There was little evidence to show that investors were contemplating moving to or expanding investments in rival locations. Existing investors and business contacts in each country were identified as key influences to new investors. However, there was a relatively low ranking given to IPAs as providers of initial information which led to investment. The significance of this varied considerably between the countries surveyed. Notwithstanding this finding, investors showed a high satisfaction rating in their dealings with IPAs and commented favorably on their usefulness. Investors generally wanted contact with IPAs, to share experiences and make suggestions for the future. Home country seminars and inward investment missions were an important source of awareness of investment opportunities.

Although this yearás survey was a pilot survey, it is expected that it will be performed periodically (annually) to solicit up-to-date information for the investment conditions in a given country. The survey will assist UNIDO in establishing a Global Forum to publish results of the survey as a "forwardlookingá indicator of investor perceptions in Africa. This will give investors an idea of the volume of capital flows existing investors are signaling will go into Africa. The indicators, taken collectively, will also shed light on the sectors that attract the most new investment, as well as on areas of improvement in policy and facilitation that will have the most impact in investor decisions. These indicators would be akin to the Consumer Confidence Index, Survey of Purchasing Managers, or other forward-looking indicators that are closely watched and utilized in economic reports for monetary policy in developed countries.

C. Investment and Technology Promotion Training Package

A presentation on the proposed investment and technology training package was given, with an overview of the contents of the manual. Components include:

- 1. Investment project preparation and appraisal
- 2. Investment promotion techniques and skills
- 3. Organizational and operational strategies for investment promotion agencies
- 4. Joint-venture and strategic partnership agreements
- 5. Technology-transfer operations including agreement formulation and negotiation
- 6. Technology needs assessment and benchmarking at the micro and micro levels
- 7. Integration of technology policy and investment strategies

The training manual will provide comprehensive coverage of the abovementioned topics and UNIDO methodologies developed through field experience. The manual will be used to train trainers in needs assessment and provide foresight to investment operations, technology transfer and project implementation.

D. Austroplan

Mr. Erich Krimmel, Director of Consultancy Services and Vice-President at Austroplan was on-hand as a member of the Advisory Panel to provide his insight. Austroplan is a consulting company founded forty-five years ago, and based in Vienna. It has field operations in many African countries, such as Nigeria, Kenya, Cote dálvoire, Zimbabwe and Ghana. Austroplanás competencies and technologies are primarily concerned with the following products: metallurgical industry, iron and steel, metals processing, metals manufacturing, wood processing, building materials and medical care products.

E. Wireless Internet Pilot Project Proposal (WIPP) á Ericsson EMEA Ltd.

Mr. Pekka Kokko of Ericsson EMEA Ltd (in his capacity as one of the Private Sector Advisory Panel members) made a project proposal to initiate a Wireless Internet Pilot Project (WIPP). Given the low penetration rate of internet access in Africa (approximately 3% of the total population of Africa), there is large potential for its use in the continentás development process. Under this project, UNIDO would promote and sponsor the WIPP in cooperation with other financial institutions. The project would enhance the capabilities of small and medium-scale companies and the rural population to become part of the IT world. Ericsson is willing to assist by identifying specific country operators, drawing up technical specifications, preparing business cases, and developing contents of wireless internet applications.

F. Afrique Initiative

Mr. Pierre Carpentier represented Afrique Initiative on the Advisory Panel. Afrique Initiative is a private investment company dedicated to supporting African SMEs. It works as a capital venture company to invest in risky projects. Its assets total over 2 million euro, but the funds come predominantly from French companies, though other European firms are sought. Afrique Initiative is working towards creating national investment companies dedicated towards SMEs specific to each

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country. In this capacity, Afrique Initiative is prepared to assist IPAs in building sustainable investment funds for venture capital.

G. Private Equity Finance

A brief presentation was made to introduce the subject and its relevance to the work IPAs. To finance a project, an investor needs equity plus credit. When he is unable to supply all of the needed equity, he may turn to a partner for input.

Many equity funds can provide this "missingá equity portion by taking shares in a company or project and selling them later on the open market. This, however, is difficult in developing countries, where the stock exchange is small, there is little liquidity, and service costs are high. In addition, the cost of researching and servicing a large number of small projects is prohibitive. In light of these circumstances, developing countries must look for mechanisms to provide services to managerás of equity funds to help reduce their cost structures and make it possible for them to operate in their countries.

An equity fund would assist Sub-Saharan African countries by providing independent management, attracting capital from domestic and international investors (institutional and individual). IPAs could spearhead and become part of the domestic support system for the fund.

III. CONCLUSIONS AND RECOMMENDATIONS

A. Objectives of the Network

The UNIDO-Africa IPA Network was launched with the following objectives:

- 1. To create a client feedback mechanism and to help fine-tune UNIDO programmes;
- 2. To bring permanence to the partnership between UNIDO and the IPAs in the integrated programme countries to build on the achievement of the integrated programme and institutionalize the capacity-building and training provided to these counterparts;
- 3. To strengthen the linkages between the member IPAs and the UNIDO networks such as the ITPOs, International Technology Centers and Subcontracting Exchange;
- 4. To establish a platform to discuss common concerns, and design joint / regional programmes to respond to some of those concerns and seek donor funding for implementation.

B. Common Concerns

The inaugural Network meeting revealed a number of common concerns:

There is currently a lack of commitment from governments to promote foreign investment. There is also absence of full support from governments to their IPAs in terms of empowerment and resources. There is also a generally negative perception of the international business community towards Africa, meaning that problems need to be fixed to improve these perceptions. There is also a need to educate the public about the benefits of foreign investment and the benefits of integrating the national economy with the global economy. Neutralizing public suspicion and hostility towards foreign direct investment is regarded as a first step to achieving full government commitment and support.

Promotion must also become more focused and target sectors identified and utilized. IT must become more prominent to develop skills in this area.

C. Approaches for developing programmes to address the concerns

The Heads of African Investment Promotion Agencies, together with UNIDO, reaffirmed the prominent role of attracting a greater volume of national and foreign investment in Africa and the importance of institutions such as the Investment Promotion Agencies (IPA).

The following approaches were suggested as methods to address the above-stated concerns:

1. Country-level Programmes

- The Investment Steering Committee model has proven useful in Tanzania. This assisted in garnering commitment from the government and assured cooperation between the IPA and government departments
- The result of the pilot survey from the four countries could be used to develop programmes immediately. The results allow the identification of existing investors who intend to expand investments and target them to facilitate the realization of those intentions. It would also be a low-cost activity that could yield immediate material results and become part of the IPA strategy. A draft programme proposal to develop relationship management activities in the IPAs is to be formulated
- It was generally agreed that the survey was very useful, but could be expanded. In some cases, the survey acted as a sobering experience as to determine what investorsá perceptions of the IPA were. The survey could be expanded, however, to become more systematic, periodic and eventually cover all countries in the Network. UNIDO could act as a neutral body in executing the survey but IPA staff could also use the opportunity to develop analytical skills to eventually develop their own surveys. UNIDO could then act as a central repository of data to provide analysis on an aggregate basis
- The country level data and analysis coming out of the surveys would be fed back to the country programme (integrated programme) and could be used to respond to several issues. First, it would provide an IPA with concrete evidence with which to lobby the government. A national workshop would be used to present the results of the survey and could be organized by UNIDO (accompanied by a press release) and a case made for mobilizing government support. Publicity campaigns to gain support could be designed
- Country level data would also be analyzed to identify areas of opportunity that would target sectors for promotion. This would alleviate the need to conduct

complex analyses to identify sectors with comparative advantages around which promotion strategies could be designed. For example, if the data revealed that investors in a particular sector were more likely to expand investment than the average sector, this would be identified as a "growthá sector

• Many members also requested that UNIDO introduce technology promotion programmes into their country programmes. This included both the introduction of concepts and issues for the IPA executives (perhaps at the next meeting of the Network as the training component) as well as more detailed skills development programmes for IPA staff and groups of domestic enterprises. UNIDO should prepare customized action plans for each of the member countries to start capacity building and bring IPAs into closer contact and cooperation with technology institutions in the countries

2. Global Forum

- The quantification of investor perception through the periodic surveys would function as a "forward-lookingá indicator which would act as an index of expectations regarding investment flows. This would be a valuable contribution to the donor / multilateral community for planning and programming
- Country-level data and analysis stemming from the survey would be fed to the countryás integrated programme and could be used to respond to several issues. It could also be used to lobby the government. A national workshop would be organized with UNIDO. Publicity campaigns would also be used to gain public support
- The survey would also provide the information needed by the IPAs to build up a comprehensive database of the companies in the country with foreign capital. This would be a major asset to the IPAs. The information provided by individual companies would be the raw material for targeted activities. In this respect the periodic surveys should be preceded by a full-fledged census
- Periodic survey and publication of the aggregate analysis could constitute a new regional programme and a Global Forum function for the Network. The changes observed over time would indicate the effectiveness of adopted actions and programmes and guide future programme development.

3. Partnering for Promotion

- Following the presentation of UNIDO Exchange, it was proposed that Network members should become members of Exchange. Exchange should be the medium of contact between Network members and a closed virtual community within Exchange will be created for that purpose
- Global UNIDO establishments, like the ITPOs and the Asian African Investment and Technology Promotion Center (AAITPC in Malaysia), are regarded by the member IPAs as very valuable resources that can facilitate effective low-cost promotion. The Delegate Programme, country promotion tours and missions by investor groups are especially valued. However, it is acknowledged that the ITPOs were also constrained by resources and facilities and therefore had to prioritize and focus their activities. It is therefore up to the IPAs to make themselves sufficiently attractive to the ITPOs to receive allocation of scarce resources. ITPOs will direct their attention to countries where they would expect to achieve high success rates. If the Network IPAs can provide the services,

information, contacts and organization support to enable the ITPOs greater effectiveness, they would gain greater access to ITPO facilities. Since all IPAs cannot be serviced by all IPTOs, a proposal was made to match

• ITPO-IPA Partnering Programme Proposal

A strategic paper was proposed by the ITPO Walloon Region of Belgium. This proposal focused on elaborating an action plan to reinforce the linkage between ITPOs and IPAs. The main idea was to organize a joint mission of ITPOs to selected African countries. Each ITPO would select a number of targeted countries in Africa to be the focus of their main interest for the year 2002. This would assist in project and country promotion. It was proposed that ITPOs submit their list of target countries by 15 December 2001.

IV. <u>THE FUTURE</u>

The UNIDO Africa IPA Network should be developed into an ongoing Regional Programme in order to build a dependable structure that can lead to the generation of new ideas, approaches and activities. The Network can provide a global forum function through publications of both original empirical data (providing country rankings and benchmarks) and analysis leading to specific guidelines and action plans. It can also be a tool for devising country and regional programmes for practical, results-oriented activities.

Numerous proposals have been made for future topics at the annual Network meeting. At the next Network meeting, there will be a half-day seminar for IPA executives on issues of technology transfer and innovation. Other possible topics include industrial subcontracting, supply chain management and a private equity fund to finance projects.

In order for the Network to function successfully, it is essential that the network be built as a strong foundation for the facilitation of investment into African countries. Member agencies must maintain regular contact to ensure that relationships, especially between IPAs and UNIDO ITPOs, are developed and maintained and common issues raised and dealt with.

With the dedication and innovation of all participants, the Network has the potential to assist all members involved in the facilitation of greater investment flows to developing Sub-Saharan countries.



LAUNCH OF THE UNIDO AFRICA IPA NETWORK INVESTMENT RESOURCE GROUP Vienna, Austria 20-23 November 2001

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