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Final Report

MARKET SURVEY

DP/MLW/88/018

for

ICS

Industrial Consultancy Services

Contract No. 91/176 E

A MTIT, UNDP, UNIDO

Joint National Project

from the

MANAGEMENT

CENTER
(Malawi)

OF POLYTECHNIC

Presented by

Mr. J.E. Chipeta, Project Team Leader
Mr. G. Gregory, Principal Research Associate
Mr. E.J. Sankhu!ani, Research Associate

December, 1991.

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EXECUTIVE SUMMARY

The following report is being submitted to UNDP as part of an exercise on behalf of UNIDO and their ICS Unit within Malawi. The focus of this report was to investigate opportunities for the ICS Unit within Malawi, the driving forces within the consultancy and training marketplace, and the necessary marketing approach needed to become a financially viable operating unit within the marketplace.

An extensive research operation was conducted in which as consultants, we feel, will give UNDP, UNIDO, and the ICS Unit a clear picture of the industrial market and their current and on-going needs into the future. We designed the research study in such a way as to gather information from a wide array of organisations, agencies, institutions, and private entrepreneurs within Malawi. The methodology used involved a variety of data gathering techniques, so as to thoroughly investigate each and every business niche within Malawi. Personal interviews, questionnaires, informal discussions, business luncheons, telephone conversations, books, articles, journals, published material, and the like, all were used in gathering data for this report.

The findings of our study were based on a survey of 41 organisations within Malawi. The specific findings for the ICS Unit were based on 13 organisations that had used either ICS Unit consultancy and/or training services, and produced several implications in regards to what the ICS Unit is doing right, and what perhaps they need to do to improve upon their performance.

The current offerings of the ICS Unit in regards to their Industrial Engineering and Production Management are quite good by industry standards. The prices they charge were rated on average as 'adequate', and the performance of their production operations management approach appears to meet the needs of the marketplace, and does so in a manner that leaves the client satisfied. However, in terms of their advertising approach, a large number of the organisations surveyed had never even heard of the ICS Unit. Within Malawi this is fairly unusual, especially since the business community is quite small. And when a client had heard of the ICS Unit, they most likely equated it with the UNIDO name.

After reviewing our findings, we recommended various strategies for the ICS Unit to both eliminate such services as accountancy (since the current market appears to be flooded within Malawi) and to add such services as marketing management (since the current offerings within Malawi do not meet the current demand for such services). In doing so, we recommended that four additional staff be hired (two in Industrial Engineering and Production Management; and two in Market Management). These service recommendations were based on our findings in regards to the segmentation exercise we conducted. This segmentation exercise allowed us to assess the marketplace in terms of demand, and to produce an Industry/Service Classification Scheme that assigns an Industry/Service Code to the types of organisations the ICS Unit might focus on as potential clients in the future.

Additional recommendations were made in terms of pricing penetration, as an initial strategy to obtain a larger client base; marketing coverage in terms of 'who' they should focus on; and a comprehensive advertising strategy to sell the services to their desired target market. In recommending the advertising and promotional approach necessary for the ICS Unit to make the public aware that they do exist, and that they do have services for which there is viable demand, we must further emphasise the importance in implementing the recommended strategies properly.

It appears as though the success of a consultancy project or of a training programme within Malawi depends significantly on two main factors: The applicability of the work to the organisation's 'real' needs, and the ability of the consultancy or training institution to sell themselves to the potential client. The ICS Unit rates fairly well in the former, however, a sincere effort is needed to promote and advertise their services.

Based on our overall findings, we believe that the demand for consultancy and training services within Malawi is significant enough, and would justify the investment into the ICS Unit of the necessary resources to become a financially viable operating unit within Malawi.

ABBREVIATIONS

1. ABS Applied Business Systems Ltd.
2. ACCA Chartered Association of Certified Accountants
3. AGR Agriculture
4. AVE Average
5. BAS Business Advisory Services
6. BASW Business Advisory Services for Women
7. CIMA Chartered Institute of Management Accountants
8. CON Construction
9. CSM Consumer Items and Finished Goods
10. CSS Computer Sales and Services Ltd.
11. CTH Clothing and Textiles
12. DEMATT Development of Malawian Traders Trust
13. EXT Mining and Extractions
14. FFP Agricultural Farming and Food Processing
15. FPR Food Processing
16. GEO GEO Services Ltd.
17. GOM Government of Malawi
18. ICS Industrial Consultancy Services
19. IDA International Development Association
20. INTN'l International
21. ISQ Industrial Service Questionnaire
22. MACA Malawi College of Accountancy
23. MAN Manufacturing
24. MCA Management Consultancy and Agencies Ltd.
25. MCH Machinery/Tools and Industrial Components
26. MEPC Malawi Export Promotion Council
27. MIDAS Midas Consultancy Services
28. MIM Malawi Institute of Management

- 29. MIN Mining
- 30. MSE Medium Scale Enterprise Promotion Project
- 31. MTI Ministry of Trade and Industry
- 32. PAEC Public Accountants Examinations Council
- 33. POET Project Officers and Entrepreneurs Training Programme
- 34. POLY Polytechnic
- 35. SEDOM Small Enterprise Development Organisation of Malawi
- 36. SER Service
- 37. SMT Service Marketing: Wholesale/Retail
- 38. TAS Technical Advisory Services
- 39. TRA Transportation
- 40. TRN Transportation: Cargo/Hauling
- 41. UMMC University of Malawi Management Centre
- 42. UNIDO United Nations Industrial Development Organisation
- 43. UNDP United Nations Development Programme

I. INTRODUCTION

The Industrial Consultancy Services (ICS) Unit is a national project set up in 1989 under the Ministry of Trade and Industry, (MTI) funded by the United Nations Development Programme (UNDP), and executed by the United Nations Industrial Development Organisation (UNIDO). The ICS Unit has been offering consultancy and training services to Malawians in order to first improve productivity, second to reduce costs of operation and third to ensure overall better management of industrial units in Malawi.

A) Background of the Study

The ICS Unit's role is expected to be considered not only necessary in meeting current needs of small to medium industry for years to come but also to expand at a modest pace to cover needs of larger enterprises. In considering possible expansion to target larger enterprises with their consultancy and training services, a market analysis was conducted to assess the demand for such services taking into consideration ICS Unit's current internal resources and the external competitive market structure already in place within Malawi. More specifically, the purpose of this study was to investigate various factors that may affect the overall marketing strategy, and which would allow the ICS Unit to generate enough revenue to remain financially self sufficient. This would include the investigation of the following factors:

- * Perceived market demand and potential future demand for consultancy and training services;
- * Analysis of individual benefits and attributes associated with use of consultancy and/or training services;
- * Manufacturing and service organisations' perceptions in regards to consultancy and training services and the market within Malawi;
- * Organisational factors that would indicate methods to segment and/or target potential customers, as well as assist in allocating resources; and,
- * Market indicators that would assist in developing financially viable marketing strategies for the ICS unit while still maintaining their role as a key industrial development unit under UNIDO.

B) Statement of Research Objectives

In order to assess the market demand for the ICS services and make realistic projections for possible expansion of such services, the following Market Survey has been conducted. The objectives of the survey were to:

1. Review current Government of Malawi Economic Policies and various donor assisted Industrial Development Programmes to assess the degree of market penetration and overall programme adaptation within various industries.

2. Assess the demand for consultancy services in Malawi covering large, medium and small scale industries in:
 - a) industrial engineering and production management.
 - b) accountancy
 - c) marketing management
3. Assess the demand for training in production techniques, accountancy, marketing, and general management at all levels from workers to senior management, for large, medium and small scale industries.
4. Analyze past ICS clients and assess performance of services rendered.
5. Analyze organisational perceptions according to current consultancy and training services offered, ability of consultancy firms in meeting consultancy and training needs, services currently not offered for which 'real' demand exists, level of satisfaction derived from the use of consultancy and/or training services, and improvements needed in providing consultancy and training services in contributing to the industrial development of the country.
6. Develop an Industrial/Service Classification Scheme so as to segment the market according to type of industry, size of organisation, and type of consultancy services and/or training services requested.
7. Develop ICS Client Profiles based on assessment of demand for consultancy and training services. Client Profiles will be devised according to the various segments within the Industrial/Service Classification Scheme.
8. Determine the level of commitment to and value placed upon various ICS services by clientele classified according to the Industrial/Service Classification Scheme.
9. Determine the level of financial commitment various clients are willing to incur when contracting consultancy and/or training services. Financial commitment will be measured in monetary units and scaled according to the Industrial/Service Classification Scheme.
10. Advise ICS as to their available courses of action in meeting industry demand and marketing their consultancy and training services to future potential clients.
11. Recommend a viable promotional marketing strategy to increase the awareness of ICS services; focusing on promoting and publicising ICS services in terms of availability, scope, diversity, and adaptability in meeting the needs of a wide array of industrial opportunities.
12. Determine the value of future ICS consultancy services and training which would ensure a worthwhile contribution towards Malawi's industrial development as well as allow the ICS Unit to become financially self supporting.

The marketing environment for consultancy and training services in Malawi is a young and fast growing industry attracting many players. Those offering such services range from small sole proprietorships or limited companies to world-renown public accounting firms or institutions of higher learning. It is clear from our study that the intended beneficiaries for such services do not take full advantage of nor are they informed as to the services that ICS Unit offers. Within this report specific recommendations are made to the UNIDO ICS Unit to develop appropriate strategies to improve patronage of their services especially among large organisations in addition to their existing clientele.

C) Overview of Report

This report is intended to restate the methodology used in the study highlighting any adjustments that have been made in light of experience in data collection. The greater part of the report will focus on the detailed findings and conclusions including appropriate data analysis. The findings and conclusions section highlights the specific objectives of the study and the relevant findings pertaining to each objective. Also included is a suggested Industrial/Service Classification Scheme devised so that potential ICS client profiles may be identified and segmented within the marketplace.

Limitations of the study will be mentioned in addition to the specific recommendations on Services to be Offered, Pricing Strategy, Market Coverage, and Advertising and Promotional approaches most suitable for marketing ICS Unit services. Appropriate tables and appendices are referenced and listed accordingly in the end of the report.

II. METHODOLOGY

A) Data Sources

The data sources for this project included a cross section of various secondary and primary sources.

Our first phase of data collection involved the collection and analysis of data relating to the external market environment and industry structure for manufacturing firms. Both secondary and primary sources of data were collected and included:

- * Current Government of Malawi Industrial Development Programmes;
- * Donor Agency development programmes and consultancy services provided by each donor agency
- * Government of Malawi Industrial Development Policy and expenditures and efforts made towards assisting the industrial sector
- * Identification of current organisations offering consultancy and training services

From the investigation of secondary sources, key organisations in the consultancy and training service industry were identified. These industry participants were used as valuable primary data sources in completing Phase II of the Data Collection Plan. The industry participants used in our sample included a cross section of small, medium and large organisations within Malawi. The information gathered from these sources included the following:

- * Key indicators as to how to classify organisations according to size, industry, and types of services needed.
- * Indication as to the driving forces within the consultancy and training service marketplace.
- * Competitive structure of various industrial and service units.
- * Initial perceptions of consultancy and training services currently being offered in Malawi.
- * Potential problem areas within organisations that may need consultancy and/or training services.
- * Initial framework for the development of the Industrial/Service Classification Scheme.

The specific data sources that were investigated included the following:

- * Donor Agencies, business advisors, UN officials, training organisation directors and private consultants.

- * Secondary documents in Ministry of Trade and Industry, GOM Development Policy 1986-1996, industrial expenditures, donor assisted project documents and donor aid budgets.
- * Industrial organisations representing various sizes, services and industries.

After collecting and analysing data from various secondary sources, certain conclusions were drawn regarding an analysis of the industry for which ICS Unit operates. The findings from this data collection exercise can be found in Section III: Findings and Conclusions of the Study (A. Industry Assessment).

The majority of the findings for this study were gathered from the industrial organisations themselves using both questionnaires and personal interviews (Primary data sources). The findings from the primary data sources can be found in Section III: Findings and Conclusions of the Study (B. Demand Analysis for Consultancy Services through F. Potential ICS Client Profiles).

B) Sampling Design and Procedures

The population for which the sample was drawn for this study consisted of all industrial manufacturing and service organisations within Malawi. Taking into consideration the realm of this study and the limitations in surveying the entire population, certain criteria were set forth to reduce the number of organisations to be surveyed while still surveying those firms representing all various segments of the industrial sector. Therefore, the following sample population selected for this study included: Previous and Potential ICS clients from organisations of varying sizes, differing industries and geographical proximity within various regions of Malawi.

A list of ICS clients was supplied by the ICS Unit, and included those clients that have contracted ICS Unit services in the past and/or are currently using their services. This ICS client list was then modified to include only those past clients that have established themselves in business and would be considered as financially viable operations, thus lending themselves as possible future ICS clients. The group of Potential ICS Clients was compiled by using a list of firms previously used by UNIDO in their 'Survey of Present Status of Production Management in Industries in Malawi' (Menon, 1985). This list was then updated by extracting those firms which have since closed down, and randomly selecting other firms to add to the list so as to give regional geographical representation throughout Malawi. This list was also updated to include those organisations which represent various other business sectors not included in the Production Management area. The resulting sample population included various industrial units within Blantyre, Limbe, Lilongwe, Mchinji, Mzuzu, Zomba, Mulanje, and Thyolo. The sample population also represented a cross-section of organisations of small, medium and large scale in size.

The majority of the sample population (approx. 80%) was taken within the Blantyre/Limbe area because it is believed that this area alone represented the majority of all industrial activity within Malawi. The total sample size surveyed in this study was 78 (13 Previous ICS Clients and 65 Potential ICS Clients). From the 78 total sample surveyed, 41 questionnaires were returned, for a response rate of 53%. TABLE 3 includes a list of all those organisations which responded to the survey.

C) Data Collection Methods and Procedures

In gathering information from Previous and Potential ICS Clients of varying sizes, differing industries, and geographical locations, both Questionnaire and Personal Interview methods were used for data collection.

The Industrial Service Questionnaire (ISQ) listed in APPENDIX 1, was administered to all those organisations in the sample population (78 total).

Since large organisations will primarily be targeted in marketing ICS Unit service and remain a largely untapped market offering the greatest potential to pay for services, the data gathering procedures were divided into the following two sample groups:

Sample Group 1: Small and Medium-Scale Organisations; and,
Sample Group 2: Large-Scale Organisations.

Sample Group 1: Small and Medium-Scale Organisations

In administering the ISQ for Sample Group 1, our research team personally distributed a majority of the questionnaires (80%) to the various organisations classified as either small or medium in size. The remaining 20% of the questionnaires for sample group 1. were mailed to locations geographically distributed throughout the Northern, Central and Southern Regions.

Our intentions in personally delivering the questionnaires were twofold. First, we wanted to personally make contact with the 'contact person' within each organisation explaining briefly our data collection intentions. Secondly, we hoped by making an extra effort to make personal contact, that we would in turn increase our response rate. Since the questionnaire at hand is quite lengthy in nature, we believed that any extra efforts to increase our response rate were necessary.

Within the last two weeks of data collection, we personally phoned each of the contact persons within the organisations that had not yet responded, and asked if they could complete the questionnaire so that we may personally collect it within the next few days. By doing so, we followed up on the data collection exercise and in turn increased our response rate substantially. Knowing the difficulty and sensitivity in responding to technical questionnaires, our procedure of personal contact accompanied by a follow up phone call and later by personal collection, proved to be very beneficial in our data collection exercise.

Of the total sample of 78 organisations in this survey, 63 of them were classified as either small or medium in size. From the 63 small and medium size organisations, 30 organisations responded, for a response rate of 48%.

Sample Group 2: Large Scale Organisations

In administering the ISQ for Sample Group 2, our research team again personally distributed a majority of the questionnaires (80%) to the various organisations classified as Large-Scale in size. The remaining 20% of the questionnaires for sample group 2. were mailed to locations geographically distributed throughout the Northern, Central and Southern Regions.

As previously stated, our intentions in personal delivery of the questionnaires was to make personal contact with the 'contact person' within the organisation in an attempt to explain our research intentions and in turn increase our response rate.

Since large organisations require greater capital outlay and resource expenditures than either medium or small size organisations, we believe that the large scale organisations needed to be investigated in greater depth as to their exact consultancy and training policy. This extra information gave us greater insight as to how the ICS Unit can cater to the specific organisation needs of the large scale enterprises. Therefore, in addition to administering the ISQ to the large scale organisations, we also followed up the ISQ with a supplementary personal interview (APPENDIX 2). Our intention in conducting a personal interview with all large organisations was to gather pertinent information that might otherwise not be gathered using the ISQ alone.

Criteria in conducting the personal interview was that we first received a completed ISQ from the organisation, and second, that the contact person within the organisation agreed to the personal interview. We then used a set of both open-ended and close-ended questions and incorporated probing techniques where necessary in conducting our personal interviews. This technique proved to be very useful in gathering more in-depth perceptions as to large organisations' current policies when contracting consultancy and training services. Furthermore, we also incorporated questions of similar nature in both the ISQ and the Supplementary Personal Interview as a validation technique in comparing the consistency in responses from both questions.

Of the total sample of 78 organisations in this survey, 14 were classified as large in size. From the 14 large organisations, 11 organisations responded to both the ISQ and the Supplementary Personal Interview, for a response rate of 79%.

III. FINDINGS AND CONCLUSIONS

The findings of this study have been categorised according to the research objectives set forth. From the 12 research objectives listed in Section I: INTRODUCTION (B. Statement of Research Objectives), the following six sections have been compiled:

- A) INDUSTRY ASSESSMENT
- B) DEMAND ANALYSIS FOR CONSULTANCY SERVICES
- C) DEMAND ANALYSIS FOR TRAINING SERVICES
- D) ANALYSIS OF ORGANISATIONAL PERCEPTIONS AS BASIS FOR SEGMENTATION
- E) INDUSTRY/SERVICE CLASSIFICATION SCHEME
- F) POTENTIAL ICS CLIENT PROFILES

A) INDUSTRY ASSESSMENT

A Manpower Policies and Strategies

- * Manpower policy in the 1970s focused on three areas:
 - (i) improving agricultural productivity;
 - (ii) augmenting the supply of Malawian technical skills;
 - (iii) improving managerial efficiency in both public and private sectors.
- * The third area is of significant importance to this Market Survey. The allocation of significant resources to meet Malawian requirements for skilled middle - and high - level manpower has long been a policy priority. The related training programmes both domestic and foreign, were designed to meet the requirements of an expanding economy and at the same time localize the many senior positions held by expatriates. It involved considerable investment in tertiary training facilities and foreign scholarships with a heavy focus given to pre-service training. This policy met with considerable success. Some attention was also devoted to the objective of increasing management capacity in both public and private sectors.

* In the ten years (1987-1996), the policy of investing in the nation's human capital by improving the skills of Malawians is being focused in four areas:

- (i) improving some of the basic skills of the mass of the population so as to boost agricultural productivity;
- (ii) developing the in-service training capability in both public and private sectors;
- (iii) tackling a number of remaining serious manpower shortages;
- (iv) improving entrepreneurial and managerial skills in a wide range of types of enterprise and sector.

The strategies which are being employed in pursuit of these policies involve action to:

- * enhance a range of technical and entrepreneurial training programmes to prepare people for, or increase their productivity in, employment and in particular self-employment.
- * pay particular attention to the training of women, youth and the disabled, giving them a specific preference in certain areas;
- * introduce or substantially enhance the training facilities for certain types of personnel (e.g. teachers, health workers, doctors, managers).

As can be seen from the briefs under each organization which are currently offering consultancy and training services, most of these strategies are being employed by these organizations in pursuit of their set objectives.

B Current Organizations Offering Consultancy and/or Training Services

The competition for consultancy and training, has, for sometime, now been stiff as new firms enter the market to compete for the clients who are looking for such services. Below are the firms which are available to any firm operating in Malawi:

1) Malawi Institute of Management (MIM)

MIM was created by an Act of Parliament in 1989 to improve management performance in all sectors of the economy by means of training, consulting and research programmes. The outputs of the consulting and research services to clients are fed into the training programmes either directly through in-house courses or indirectly through generic training programmes.

So far, MIM has run courses in:

- * General Management
- * Human Resources Management
- * Accounting and Finance
- * Economics and Project Management
- * Management Information Systems
- * Business Topics
- * Special Seminars

2) Malawi College of Accountancy (MACA)

MACA is a parastatal body established under the Education Act. Its mission is to contribute to the socio-economic development of Malawi through the education, training and development of manpower, appropriate to the needs of the country, to be achieved through the promotion of excellence in teaching, research, publication and consulting, in accountancy and cognate disciplines.

The College offers training for Professional and Diplomate accountants. In addition, a Financial Studies Centre has been established within the College which offers courses within a strong accountancy bias.

The courses offers include:

- * Professional Accountant - ACCA
- * Management Accountant - CIMA
- * Diplomate Accountant - PAEC
- * Certified Diploma in Accounting and Finance for Managers - ACCA
- * Certificate in Accounting
- * Certificate in Business Computing
- * Certificate in Financial Management.

3) University of Malawi, Management Centre (UMMC)

The Polytechnic is a constituent College of the University of Malawi and UMMC is one of the departments within the College. The Polytechnic has been running short management courses, especially for supervisory and middle-management levels since 1968 on an adhoc basis at first, but the courses were formalised in 1978. The current Management Centre has been made to expand this service to include in-house or company based courses and consultancy services for clients throughout Malawi. In addition the Centre runs a University Diploma in Management Studies, offers tuition for The Chartered Institute of Marketing and The Institute of Commerce professional courses.

The short courses in Management which UMMC has offered include:

- * Practice of Management
- * General Management Development
- * Supervisory Management Skills
- * Principles of Marketing
- * Human Resources Management
- * Inventory Management
- * Staff Recruitment and Training
- * Performance Appraisal Systems
- * Selling and Sales Management

4) The Small Enterprise Development Organization of Malawi (SEDOM)

Established in 1982, SEDOM aims at, among other reasons firstly assisting in the creation, expansion and modernization of Malawian-owned small enterprises particularly in the area of manufacturing, processing, repairing, maintenance, mining, construction and agro-business. Secondly, promoting the development of Malawian entrepreneurs and assist in creation of a pool of skilled and semi-skilled workers.

SEDOM provides assistance to its clients in the following areas:

- * financial loans;
- * technical advice;
- * industrial premises;
- * feasibility studies;
- * product development;
- * transfer of technology to Malawian entrepreneurs;
- * marketing on behalf of entrepreneurs.

SEDOMS training activities include:

- * on-the-job training
- * in-house training
- * self-improvement training
- * short courses abroad
- * middle management training courses.

For its entrepreneurs, SEDOM organizes different types of programmes:

- * seminars
- * workshops
- * training abroad
- * study tours.

5) Development of Malawian Traders Trust (DEMATT)

DEMATT is a parastatal organization formed in 1978 under the Trust Incorporation Act of Malawi. Its main mission is to promote small and medium-scale enterprises owned and managed by Malawians through provision of Business Management and Technical Advisory Services.

- * Primarily through its consultancy and training approach, DEMATT works towards increasing and improving the general participation of local Malawians in enterprise development and management and enhance their technical capabilities for effective running of businesses.

Programmes run by DEMATT include:

- * Business Advisory Services (BAS)
- * Technical Advisory Services (TAS)
- * Business Advisory Services for Women (BASW)
- * Special Programmes
 - Medium Scale Enterprise Promotion Project (MSE)
 - IDA Project
 - Transport Project
 - Rural Housing Project

6) Project Officers and Entrepreneurs Training Programme (POET)

The objectives of the programme are to enable Project Officers and/or Entrepreneurs in the SME sector:

- * strengthen their skills and knowledge;
- * identify their roles and be able to play them effectively
- * identify and utilise available human and material resources that are essential in Business Opportunity Identification, Project Preparation, Project Appraisal, Project Implementation and Business Monitoring.

POET Programme lays particular emphasis on skill and knowledge areas which enable project officers/entrepreneurs to perform their tasks more effectively.

POET has run courses in:

- * Business Opportunity Identification;
- * Project Preparation
- * Project Appraisal
- * Project Implementation
- * Business Monitoring

Their new course, which is yet to be inaugurated in the new year, is Credit Development and Management.

The above list of organizations currently offering consultancy and/or training services may not be exhaustive as one can yet cite other firms such as Applied Business Systems Ltd (ABS), Management Consultancy and Agencies, Internal Marketing and Promotion Services, Midas Consultancy Services, Luster Consulting, Giltex Consultants, Malawi Export Promotion Council (MEPC), Market Force and so on.

Industrial Consultancy Services (ICS) has quite a big challenge ahead. Almost every possible area of operation has been taken over by some consulting and/or training firm. ICS would have to identify a segment in the market and concentrate on this potential market.

The two main activities of the project are:

- 1 to provide training to the nationals involved in industry;
- 2 to offer consultancy and advisory services in production management and allied functions of management to industrial units.

For the first activity, ICS would compete squarely with MIM, UMMC, DEMATT, SEDOM, ABS, plus a host of mushrooming training firms. Similarly, the second activity of consulting would face stiff competition from MIM, DEMATT, SEDOM, and Professional Accountancy Firms (like Deloitte).

B DEMAND ANALYSIS FOR CONSULTANCY SERVICES

The firms which form the population of this survey were broadly divided into three categories: small (9.8%), medium (63.4%) and large (26.8%) as shown in FIGURE 1. In determining whether an organization was small, medium or large, 57% of the organizations considered sales turnover as the most important determinant, followed by capital employed (22%), total assets (20%) and finally number of employees (3%) - (see FIGURE 2). Thus, the majority of organizations surveyed were in the medium category.

FIGURE 3 shows a further analysis by industry activities of all firms. 51.2% were consumer goods, followed by agricultural goods, then tools/machinery, clothing, food processing, service, transport and mining, in that order.

Taking a total population of only the manufacturing firms, and again categorising them by industry activities, the results are that 63.6% of the firms were engaged in consumer goods followed by tools/machinery, clothing, food processing and lastly construction. (See FIGURE 4). Thus, most of the demand for consultancy and/or training is by medium size firms, processing consumer goods.

An analysis of firms facing organizational problems (TABLE 1) indicate that 85% of all medium sized firms have faced problems. Of these, only 58% have used either consultancy and/or training services. Further analysis indicates that 100% of all small organizations faced problems and of these firms 75% used both consultancy and training services in order to solve the problems. Similarly for large organizations, 91% faced problems and the same percentage contracted both consultancy and training services. Overall, 19% of those who faced problems never contracted either consultancy or training services.

FINDINGS ON CONSULTANCY SERVICES

The survey showed that out of 88% of the companies who faced problems, 61% used consultancy services [TABLE 1], indicating the general awareness of the usefulness of the consultancy services.

Reasons for using consultancy services (FIGURE 5) were listed as:

- * the need to assess the market in which one is operating;
- * Improve the subordinates' performance in their assigned tasks;
- * learning new methods of operation;
- * problem identification in the organization;
- * management development for higher responsibilities;
- * utilization of resources which otherwise would be idle;
- * learning new techniques for improved productivity.

However, a supplementary interview carried out with some large organizations revealed that there were some organizations who did not know the advantages to be gained from consultancy services, (i e why they should use such services). They needed to be shown how consultancy could transform their business fortunes.

Lack of knowledge was also responsible for poor ICS performance in the survey. As TABLE 2 shows, 34% of the respondents indicated that they were familiar with ICS and 66% indicated they were not. This calls for extra marketing efforts in order to increase the awareness, to organizations, of the offerings of ICS.

Further analysis, as shown in TABLE 2, show that 93% of those who did not use consultancy services were willing to be informed of the usefulness of consultancy services and of these, 85% were willing to use such services. This would certainly mean an improvement on the current situation, as only 40% used consultancy services.

Considering those who have been informed (aware) but do not use the consultancy services, several reasons were listed (FIGURE 6):

- * high fees, which are normally charged by consultants. Being professionals in the trade, clients find it difficult to justify the price they will pay vis-a-vis the work done.
- * Consultants' lack of knowledge (or understanding) either of the organization in general or the actual problem, resulting in too theoretical ideas being recommended.
- * in some cases, the client perceives that there is no need for consultancy, as the problem can be handled without 'interference' from an outsider.
- * unfamiliarity with services on offer, and as explained above, this can be overcome by thorough advertising.
- * lack of funds to pay for such services, which might be linked to high fees.
- * no immediate benefits to be derived from consultancy - it takes time to realise the benefits. As a result clients worry about the low return on investment.
- * Consultancy services are not applicable to all organizations, such that a client will not seek for these services if he thinks that his organization will not benefit.

The market for consultancy services does exist in a lot of organizations. FIGURE 18 shows the services for which potential clients expressed interest in using consultancy services included:

- * production planning
- * feasibility studies
- * wage incentives
- * accounting
- * market survey
- * plant layout
- * marketing management
- * job evaluation
- * repair/maintenance
- * production methods
- * engineering.

All these areas can be explored further. A wide spectrum of possible activities, one would be advised to specialise in one area where the expertise exists.

C. DEMAND ANALYSIS FOR TRAINING SERVICES

The survey showed that out of 88% of the companies who faced problems, 71% used training services (TABLE 1) indicating a general awareness of the need for qualified personnel in the organization.

Reasons for using training services are listed (FIGURE 7) as:

- * need to upgrade skills of the personnel;
- * increase effectiveness of the worker in his performance on the job;
- * the need to develop new skills which would be useful on the job;
- * human resources development, which, in most cases leads to a motivated employee. It is difficult, if not an impossible task, to work with a demotivated employee.

In general, most organizations do use training services, in-house or otherwise, than they use consultancy services. However, the knowledge as from where such training services can be obtained still lacks in many organization. As stated above when reference was made about ICS's poor showing in the survey, of those firms who were familiar with ICS services, 90% used training services (as opposed to 40% who used consultancy services)

Despite this positive observation, there were other organizations which did not use training services available and among the reasons given were (FIGURE 8):

- * inexperienced people conducting the training - they need to gather the necessary business experience first.
- * a lot of training being advertised was irrelevant to the organisation's needs, a training needs assessment must be conducted before a course is organized.
- * the timing of the course - either duration (2 days is too short a time to grasp any useful concepts) or the course might run at a time when everyone in the organization has peak loads.
- * the fees charged by certain training institutions - e.g. K595 for 2 days is viewed as too high, lacking value for money. On the other hand, K595 for 1 week would be viewed as fair.
- * certain organizations will send their employees on a training course only if it is free or heavily subsidized (K50 instead of K350). This is due to lack of funds which can be set aside for training.
- * no need for training was the last reason given, it can be argued that this was a negative attitude towards training as every organization can identify a training need for its employees.

The market for training services does exist in all organizations. The survey (FIGURE 9) shows the training services for which potential clients expressed interest in using:

- * management development
- * marketing management
- * production methods
- * accountancy
- * selling techniques
- * production planning
- * computing

Which ever course an institution wants to mount, it would be advisable to carry out a training-needs assessment in order to build into the course the relevant topics which can benefit the participants.

D. ANALYSIS OF ORGANISATIONAL PERCEPTIONS AS BASIS FOR SEGMENTATION

The analysis of organisational perceptions was conducted so as to provide a basis for segmentation within the marketplace. Various indicators were looked at in an attempt to identify certain 'key indicators' and segment the market based on those indicators. From our preliminary analysis, the following indicators were investigated:

- 1) Level of Demand Expected and Services Desired
- 2) Perceptions on Usefulness of Consultancy and Training Services
- 3) Level of Satisfaction Derived
- 4) Perceptions of ICS Unit and Services Rendered

1) Level of Demand Expected and Services Desired

According to the demand analysis for consultancy services, several limiting factors seem to exist within the marketplace. First, many organisations (12% of survey) seem to be Unfamiliar with the Benefits that consultancy can offer. If firms are unfamiliar with the benefits, then chances are that they will not take the initiative to seek such services. Second, according to our findings, nearly 30% of those organisations surveyed, believed that the primary reason why they wouldn't use such services was because of the High Level of Fees charged. Even though the ICS Unit, on average, has a fairly low fee for such services, organisations still make the association of consultancy with high fees.

Furthermore, based on our supplementary interviews of large organisations, a primary concern in using consultancy services was in the applicability of such services towards the organisation's problems. This may be due to the consultant's Lack of Knowledge, or in the non-applicable approach taken. FIGURE 6 displays the primary reasons why organisations do not use consultancy services.

Generally speaking, if organisations are both unfamiliar with consultancy services and associate their use with high fees, then a consultancy firm will initially have to use a number of promotional tools to 'push' their services in order to change the current perceptions. In doing so, it is important that a consultancy firm identify the primary reasons why organisations would use consultancy services.

According to our findings, the main reason why organisations use consultancy services is to **Assess the Market**. These findings are further supported by our supplementary interviews with large organisations, in which the primary area of consultancy service demand was **Marketing Analysis**. As competitive environment within Malawi increases due to liberalisation policies, the ICS Unit could perhaps use the need for market assessment as a promotional tool in selling their services. The remaining reasons why organisations use consultancy services are displayed in **FIGURE 5**.

Our analysis of the demand for training services within Malawi indicated increasing demand for all training services across the board. The primary reason why organisations use training services is to **Upgrade Skills** (35% of sample response). Furthermore, nearly 20% of those surveyed felt that the primary reason for using training services was to **Develop Marketing Skills**. Again, these findings are consistent with the belief that the demand is highest for skills related to **Marketing**. The remaining reasons why organisations use training services are displayed in **FIGURE 7**.

In offering training services, however, it is important to be aware of the concerns of the organisations in contracting such services. The primary reason why organisations do not use training services is because of **Unskilled Trainers** (25% of response). The second primary reason was due to **Irrelevant Training** (21% of response). These findings have certain implications on the hiring of trainers and the conducting of courses.

In general organisations appear to be willing to use consultancy services when they know exactly what they are getting and exactly how it can be applied to their business. With training, organisations tend to believe that training is directly beneficial to the organisation through increased effectiveness and/or human resource development. Organisations' primary concerns lie in their belief that the consultant is simply there to reap the financial benefits of consultancy and lacks the insight to apply practical concepts in solving the organisation's problems. In terms of training, a high level of demand exists for training services within Malawi. However, the market for training institutions seems to be tightening, in that the supply of training services exceeds the funds available for training services. Given this increased competitive environment in the training market, training institutions need to be both professional and creative in the offering of such services.

2) Perceptions on Usefulness of Consultancy and Training Services

In an attempt to segment the market according to organisations' perceptions, we Cross-Tabulated the Industry Classification with their activities as our initial development of our Industry/Service Classification Scheme. Furthermore, we then Cross-Tabulated the Industry/Service Classification with the industry's perception on usefulness of both consultancy and training services.

The findings of our Cross-Tabulation exercise indicated that on average, the rating on degree of usefulness of consultancy services was fairly consistent across a wide range of industries. In other words, whether an organisation participates in manufacturing, agriculture, services, etc., they on average believe that **Consultancy Services are Useful** (SEE FIGURE 11).

The average rating on degree of usefulness of training services, however, varied by industry. That is, the industries that found training services **More Than Useful** were the **Manufacturing and Food Processing and Transportation** industries. Across all industries the average rating on degree of usefulness of training services was useful (SEE FIGURE 10).

Additional Cross-Tabulation was done to compare the ratings on usefulness in general versus the ratings of those who have actually used such services. Our Cross-Tabulations indicated that on average the ratings were much higher for those who have actually used such services. On average across all industries, the average rating on usefulness was **More than Useful** for **Consultancy** services. Again in analysing the individual industry/service classification the **Manufacturing of Machinery/Tools** and the **Transportation** industries rated consultancy services as **Very Useful** (SEE FIGURE 12).

For training services, again, the average ratings on usefulness were higher for those organisations who have actually used such services. On average across all industries, the average rating on usefulness was **More than Useful** for **Training** services. Consistent with the findings on the **Manufacturing of Machinery/Tools** and the **Transportation** industries, the ratings for training services having actually used such services were **Very Useful** (SEE FIGURE 13).

It perhaps is important to note that the **Manufacturing of Machinery/Tools** industry gave the lowest rating on both consultancy and training services in general, however, after having used such services, this industry then rated the usefulness quite high. This has certain implications on the initial perceptions of those organisations within the **Manufacturing of Machinery/Tools** Industry/Service Classification.

3) Level of Satisfaction Derived

In measuring the satisfaction derived from using consultancy and training services, several factors were taken into consideration. First, each organisation measured their level of satisfaction based on two important attributes: Satisfaction derived from use, and Level of Fees Charged for services. Second, we compiled the attribute ratings for each consultancy firm and training institution and averaged them on a scale of 1 to 5. The ratings were transposed so that a favourable rating on satisfaction corresponded to a favourable rating on fees charged.

Taking into consideration that the satisfaction derived from use is of greater importance than the level of fees charged (e.g. an organisation engages in consultancy knowing the fees ahead of time), the plotted results show the ranking of each firm based first on satisfaction their client received, then on the level of the fees charged. The ratings for each consultancy firm were then correlated and plotted in FIGURE 14 .

The results indicate that the level of satisfaction derived from using any of the consultancy firms shows little variance. That is, on average, the level of satisfaction is very similar no matter what consultancy firm they use. However, the level of fees charged varies significantly. The levels of fees from DEMATT are considered on the low side, whereas the level of fees from ICS Unit, CSS, MCA and Donor agencies are considered to be adequate. These results are consistent with the review of fees charged by each firm.

These two attributes will need to be considered when developing a marketing strategy for the ICS Unit. Market strategy adjustments may result in adjustments to these ratings, and certain tradeoffs may result in capturing additional market segments. However, when adjustments in attribute ratings take place, the addition of market segments usually results in the lose of other market segments. The results of attribute ratings for training institutions within Malawi showed a greater variance in the level of satisfaction derived. The overall levels of satisfaction derived from training services were higher than for consultancy services. This is probably due to the fact that most organisations can equate satisfaction more easily in training services than in consultancy services. Furthermore, the variances in satisfaction levels were also greater in training services than for consultancy services.

ICS fared quite well in terms of level of fees charged, and in terms of level of satisfaction their clients derived. The attribute rating of training institutions within Malawi can be seen in FIGURE 15 .

Overall, the levels of satisfaction for both consultancy and training services within Malawi are fairly high. There doesn't seem to be any significant correlation between the level of satisfaction derived and the level of fees charged. This may be a result of the duplication in efforts of services currently being offered. There are, however, certain implications in the ratings of the level of fees charged. If organisations are realising equitable satisfaction at varying levels of fees charged, certain conclusions can be drawn in regards to the availability and knowledge of services being offered. If this holds true, then the market is susceptible to advertising and promotion efforts.

4) Perceptions of ICS Unit and Services Rendered

The findings in regards to the perceptions of ICS Unit and the services rendered by their clients provided information in relation to their past performance and provided insight into their future market potential.

The findings indicated that only 34% of the respondents were familiar with ICS Unit of UNIDO. The low percentage may be due to the ICS Unit name. Data collection procedures indicated that from the respondents that were familiar with ICS Unit, that many of them referred to the ICS Unit as UNIDO. Thus, when asked about ICS Unit, many did not know it by name, but rather knew it by UNIDO. This implies that the ICS Unit name is not well known among organisations and leaves room for certain implications in regards to revised advertising and promotional strategies.

Of the 34% who were familiar with the ICS Unit, 71% have used ICS services. Again this implies that perhaps the major reason for familiarity was because the organisation used their services. The major source of information about ICS Unit came from Print (media ads)—69%, whereas word of mouth was the second major source of information—25%. Of those clients using ICS Unit services, 40% used consultancy, 90% used training, and 30% used both.

Previous clients showed a great deal of satisfaction, in that 85% said that they would use the ICS Unit services again. The findings also indicated that market potential certainly exists for future ICS services, in that 93% of all the respondents in this study indicated that they would be willing to be informed about future ICS Unit services.

Additional analysis was performed on the individual services contracted from ICS Unit. The findings showed the satisfaction ratings for ICS consultancy services and training services, by specific services rendered. ICS consultancy services had an overall rating above average, with specific ratings of Very Good: **Repair/Maintenance, Production Planning, and Quality Control.** All other consultancy services were rated average (SEE FIGURE 16). Given these results, ICS Unit should consider improving those services for which they were given an average rating, while maintaining and enhancing those services which they perform very good.

In terms of training services, ICS Unit services were a bit higher. The overall rating was Very Good, with specific ratings of Excellent in **Marketing Management.** Training services for which they were given an average rating include Management Development and production techniques (SEE FIGURE 17). These latter two services should also undergo investigation to see what can be done to improve upon them.

These results have implications in regards to the current offering of specific consultancy and training services. Possible strategies in which the ICS Unit could implement include specialising in only those services for which they perform well in, thus eliminating other services for which they are weak; or, acquiring the necessary resources to increase performance in those areas for which they are weak.

Taking this into consideration, further investigation into services for which potential clients express interest in was performed. The results indicated that the consultancy services for which potential clients expressed interest in was extremely fragmented (SEE FIGURE 18). With such a fragmented market demand, ICS Unit must consider it's market coverage very carefully. In doing so, they must consider the services which have the highest demand and focus their efforts on those areas. They must also consider what their competitors are doing so as not to duplicate certain services. From the results, the key potential areas include: **Production Planning, Marketing Management and Surveys, and Plant Layout.**

The training services for which potential clients expressed interest in included: **Marketing Management, Management Development, and Production Methods.** These three areas make up nearly 65% of the entire demand as expressed interest in the future (SEE FIGURE 9). By concentrating their efforts on similar areas in consulting as well as in training, ICS Unit will be able to utilise their resources while providing the maximum possible market coverage.

E). INDUSTRY/SERVICE CLASSIFICATION SCHEME

The **INDUSTRY/SERVICE CLASSIFICATION SCHEME** is a classification scheme designed so as to provide the ICS Unit with a system to classify organisations according to the size of the firm, industry they belong, activities they participate in, competitiveness within industry, demand rating for consultancy services, and demand rating for training services.

This classification scheme will in essence provide the ICS Unit with a system to segment the marketplace according to specific characteristics of each organisation. This scheme will in turn allow the ICS Unit to focus on those types of firms which require the specific services ICS Unit offers. The end result will be the development of customer profiles so that the ICS Unit will be able to target specific organisations and meet the unique demands characteristic of the market for which they operate.

SIZE OF THE FIRM

As previously stated, the distribution of organisations surveyed by size of organisation for this study was **Small Organisations — 10%, Medium Organisations — 63%, and Large Organisations — 27%.**

The size of the firm was determined using several factors. First, our preliminary analysis gave us an initial classification for the sample organisations. Second, we asked each organisation to list the major factor in determining it's size. The findings showed that by far, the primary determinant in determining size of an organisation was **Sales Turnover (SEE FIGURE 2)**. The organisations were also asked to rate themselves in size based on each determining factor. The results were then compared to our preliminary analysis and an overall size of an organisation was determined.

Therefore, the first letter of the classification code will represent the size of the firm (**S-small, M-medium, L-large**).

INDUSTRY CLASSIFICATION

Each organisation within the sample was asked to classify themselves based on the type of industry they belong. The findings indicated that a majority of those organisations surveyed belonged to the manufacturing industry, more specifically, the manufacturing of consumer goods, (SEE FIGURE 3).

Based on the cross-section of the types of industries surveyed, the following five major types of industries are represented, and a code assigned to each:

CODE - Type of Industry

MAN - Manufacturing

MIN - Mining

AGR - Agriculture

SER - Service

TRA - Transportation

Therefore, the second three letters will represent the industry for which an organisation belongs.

INDUSTRY ACTIVITIES

In addition to the industry for which an organisation belongs, the activities of that industry were also investigated. The findings indicated that the organisations surveyed participated in a variety of activities.

Based on the cross-section of the types of industries surveyed and the types of activities they participated in, the following nine major types of industries are represented, and a code assigned to each:

CON - Construction

CSM - Consumer Items and Finished Goods

MCH - Machinery/Tools and Industrial Components

FPR - Food Processing

CTH - Clothing and Textiles

FFP - Agricultural Farming and Food Processing

SMT - Service Marketing, Wholesaling/Retailing

TRN - Transportation: Cargo/Hauling

EXT - Mining and Extractions

Therefore, the third three letters will represent the activities for which an organisation participates.

COMPETITIVENESS WITHIN INDUSTRY

Each organisation was then asked to rate the level of competitiveness that they face within their respective industry on a scale of 1 to 5, with 1-non existent, 2-weak, 3-reasonable, 4-tough, 5-very tough.

The ratings on competitiveness were then adjusted according to the percentage market share each organisation indicated as holding within their respective industries.

Therefore, the fourth digit will represent the adjusted degree of competitiveness within the respective industry for which the organisation participates.

DEMAND RATING FOR CONSULTANCY SERVICES

In determining a demand rating for an organisation, a cross-section of responses to various 'desire to use' types of questions was performed for consultancy services. The resulting demand rating for specific organisations was then based on the following factors: interest in use, source of contracting, perception of services, usefulness of services, allocation budget, and frequency in past use of services.

A weighted factor approach was used to assign a certain weight to each type of response, giving equal proportional representation to each of the factors (i.e. a weighting factor of (.157) was assigned to each factor score).

The following scale was then formulated from 1 to 5, with 1 - little to no demand, 2 - little to fair demand, 3 - fair to moderate demand, 4 - moderate to frequent demand, 5 - frequent to heavy demand.

Therefore, the fifth digit will represent the demand rating for consultancy services for each organisation within their respective industry.

DEMAND RATING FOR TRAINING SERVICES

In determining a demand rating for an organisation, a cross-section of responses to various 'desire to use' types of questions was also performed for training services. The resulting demand rating for specific organisations was also based on the following factors: interest in use, source of contracting, perception of services, usefulness of services, allocation budget, and frequency in past use of services.

A weighted factor approach was used to assign a certain weight to each type of response, giving equal proportional representation to each of the factors (i.e. a weighting factor of (.157) was assigned to each factor score).

The following scale was then formulated from 1 to 5, with 1 - little to no demand, 2 - little to fair demand, 3 - fair to moderate demand, 4 - moderate to frequent demand, 5 - frequent to heavy demand.

Therefore, the sixth digit will represent the demand rating for training services for each organisation within their respective industry.

TABLE 3: INDUSTRY/SERVICE CLASSIFICATION SCHEME on page 61 lists the organisations in the survey and their respective Industry/Service Classification Code. The legend for the coding system, with an example on using the code are indicated within the scheme. The classification code was then used to generate the following potential client profiles for the ICS Unit.

F) POTENTIAL ICS CLIENT PROFILES

Using the Industry/Service Classification Scheme, various potential ICS client Profiles have been developed. In conjunction with the classification according to industry and activities, addition information in regards to current services used and desire for future services has been compiled to form a profile of a potential ICS client. Each client profile will list the industry for which they participate, the activities they engage, their location within Malawi, services they have used, services they are interested in, and the overall perceptions of the current offering of consultancy and training services within their activity area.

CLIENT PROFILE 1

INDUSTRY	:	Manufacturing
ACTIVITIES	:	Industrial Components: Machinery, Tools, Heavy equipment, Mining and Extractions
LOCATION	:	Urban areas: Blantyre/Limbe, Lilongwe
SERVICES USED	:	Industrial Engineering, Production Methods. Training Services: Production oriented.
SERVICES DESIRED	:	Specific services applicable to their organisation. Primarily, Production Planning, Work Method Studies, Plant Layout, and Quality Control. Training services in terms of Production Techniques and Management Development.
OVERALL PERCEPTION:		More time needs to be spent on gearing the application of services towards the specific organisation. ICS Unit has had good ratings in this regard, and perhaps should promote their services along these lines. Definite need for qualified consultants and trainers in these areas. Initial belief is that services are only contracted when a problem exists, rather than to avoid problems. Again, a large market exists yet mainly lies untapped.

CLIENT PROFILE 2

INDUSTRY : Manufacturing

ACTIVITIES : Manufacturing of finished goods, consumer items, and food processing and clothing items

LOCATION : Urban Areas: Blantyre/Limbe, Lilongwe

SERVICES USED : Various Industrial Engineering Services and Production Management techniques, Accountancy, and Marketing Management. Training emphasis in Marketing and Marketing applications.

SERVICES DESIRED : Primary need for Marketing Management in terms of consultancy and training. Market Assessment, Research, Selling Techniques, etc. Light Production Methods also needed, such as Production Planning, Quality Control, Materials Handling, and Production techniques.

OVERALL PERCEPTION: Definite need for Marketing Management skills development and to increase production efficiency. Overall demand for management development techniques, but believed that these areas are covered by other training courses through the Polytechnic and MIM. High demand for Marketing Training and selling techniques in relation to consumer goods. Again, concern that consultancy services aren't being focused specifically on the organisation. Market segmentation possible for those organisations that produce for wholesale only. In this situation, specialisation in terms of products, manufacturing processes, and retail marketing techniques.

CLIENT PROFILE 3

INDUSTRY : Agricultural

ACTIVITIES : Agricultural Farming, Production and Marketing

LOCATION : Thyolo Area

SERVICES USED : Primarily training only, in the areas of computer applications, management development, secretarial services, and marketing applications.

SERVICES DESIRED : More training courses on marketing applications and production techniques. Also need for middle and lower management training in terms of accounting systems, credits and collections, and computer applications.

OVERALL PERCEPTION: Very low demand for consultancy services since most problems are handled internally, or through agricultural associations. Moderate training needs in terms of computer applications and marketing applications. However, the Polytechnic and various accounting courses and computer consultants have filled the gap for this market. Business distribution of labour shows to be very labour intensive, therefore, demand is considered low.

CLIENT PROFILE 4

INDUSTRY : Service

ACTIVITIES : Service Marketing, Wholesale/Retail,
Transportation/Hauling

LOCATION : Urban and Semi-Urban Areas: Blantyre/Limbe,
Lilongwe and Mchinji

SERVICES USED : Mostly ad-hoc consultancy and periodic
training services. Consultancy in terms of
Marketing distribution, transportation, and
channels of distribution. Other Marketing
services used such as selling techniques, and
Marketing Management. Some training in
computer applications also used.

SERVICES DESIRED : Need for more training workshops in Marketing
Applications: Selling techniques, Marketing
Management, Promotion/Advertising, etc. Also
a significant need for distribution
strategies for transport companies.

OVERALL PERCEPTION: Overall demand light to moderate, but only in
the areas specified: Marketing, computer
applications, and some management
development. Services for consultancy rarely
used.

IV. LIMITATIONS OF STUDY

When conducting this study, certain factors hindered our collection of information, and hence, are discussed as limitations of study. The specific limitations we encountered include the following:

1. The slow response rate from the population.

This was anticipated given the length of the questionnaire. Even though the Blantyre and Lilongwe clients had their questionnaires hand delivered, with a promised date to collect, in more than 30% of the cases, the questionnaires either arrived late or were never returned.

2. Incompleted Questionnaires

Some of those who returned the questionnaire did not complete them thoroughly. Approximately 20% of the returned questionnaires were not completed thoroughly. There were some careless omissions, suggesting that perhaps they either did not read the questionnaire carefully, or did not give it the seriousness it deserved.

3. Attitudes in filling out Questionnaires

The attitudes of certain clients, even those who have used ICS services at one time or another, was very disappointing. Both their initial reaction by showing no intention in completing the questionnaire, and their reluctance in accepting it, claiming that they did not want to release confidential information. Even though we took special care in designing the questionnaire, in that we never asked for specific financial information, people still showed reluctance in completing the questionnaire.

4. Time in completing Project

The time factor in completing this project was quite short -- only three months. This was seen in the fact that during our final week of data analysis, nearly 10% of the questionnaires were returned. Furthermore, an additional seven questionnaires were returned the we submitted the draft report. This alone would have raised our response rate to 48 out of 78 (from 53% to 62%). Given the extend of this study and the nature of data collection, we believe that for a thorough analysis throughout Malawi, that an additional two months would've provided additional opportunity to conduct more personal interviews and to receive more completed questionnaires.

V. RECOMMENDATIONS FOR ICS UNIT

The recommendations for this study have been based on a thorough analysis of the marketplace for consultancy and training services within Malawi. Each recommendation will be outlined according to the proposed market strategy for the ICS Unit. That is, specific recommendations will be made for: **Services Offered, Pricing Strategy, Market Coverage, and Advertising and Promotional Approach.**

A. SERVICES OFFERED

1. The current offerings by the ICS Unit are in consultancy, training, and advisory services. Both can be conducted by the same group of people, however, it seems that the ICS Unit is currently trying to cover too much ground especially since there are only three members of staff.

Within our findings, we discovered that the ICS Unit's strength lies primarily within their industrial engineering and production management services. Furthermore, additional market assessment in terms of desired needs indicates that the services of marketing management are strongly needed. It is therefore recommended that the ICS Unit concentrate their operations in the following two areas:

- (a) Industrial Engineering and Production Management: This is consistent with the current mission of the ICS Unit so far and the expertise in this area has already been established.
- (b) Marketing Management: Since there is a clear demand for consultancy and training in the Marketing Management area, and since not many consultants have ventured to establish themselves in marketing, this area should be pursued.

We further recommend that Accountancy section be discontinued due to stiff competition from the professional institutions like Malawi College of Accountancy, Deloitte, and various other institutions and agencies who already have the right calibre of staff and the infrastructure in place.

For the implementation of this recommendation, we further recommend that new specialists be recruited to undertake the marketing management demand and to support the already existing industrial engineering and production management expertise.

2. Currently the ICS Unit has three members of staff -- The Chief Technical Adviser, and two national project coordinators: one in production management and industrial engineering; the other in cost accounting and financial management. As a follow-up to (1) above, we recommend that the staff be strengthened by increasing the number of consultants on the project by at least four; two in Industrial Engineering and Production Management, and two in Marketing Management

3. The quality of consultants and trainers has quite a bit to do with the image of the ICS Unit. The consultants should have the necessary academic qualifications, but in addition, they should have the relevant industrial experience. Practical, easy-to-implement recommendations as a consultant go a long way to enhancing the image of ICS (and thus customer loyalty and satisfaction) than a theoretical recommendation, which could be of no value and of no practical use to Malawian businesses. We therefore recommend that the new recruits be of the requisite qualifications (academic and experience) preferably having industrial experience and the local level.
4. The first three recommendations require both contraction of certain services offered, and expansion of various resources needed in meeting demand and to remain a viable operation. In meeting the financial obligations necessary to operate, the ICS Unit will need to generate enough income to become self sustaining. In doing so, we recommend that instead of marketing their services to primarily small and medium size firms as they have done in the past, that they should focus now on marketing their services towards the medium to large organisations. Our findings indicated that from all medium and large organisations, over 90% indicated that they are willing to pay for such services. According to our personal interviews with the large organisations, over 90% of them indicated that they set aside a budget for either consultancy and/or training services. Medium to large organisations not only can afford to pay for such service, but they are also the ones who can easily appreciate the benefits of trained personnel and consultancy and/or advisory services.

B. PRICING STRATEGY

1. Consultancy Services: We recommend that ICS follow the normal practice of estimating the duration and cost per day of the project, which would facilitate working out the cost of the entire project. Based on our personal interviews with large organisation, the minimum charge for a consultant per day within Malawi is K300 (three hundred kwacha - approximately \$100/day). If the ICS Unit could offer comparable rates to others who charge approximately K300/day, then they could operate profitably. In assessing the amount an organisation would be willing to pay, the analysis showed that most organisations base the fee they pay on the job that is performed. It is, however, important to note that the primary motive in paying such fees is that the organisation receive value-for-money. This should be emphasised in giving quotations for fees, and the ICS Unit should also perform a cost/benefit analysis at no charge for the prospective client. This will demonstrate good will on the part of the ICS Unit, and assure future business. Also, we recommend that the ICS Unit initially use a pricing penetration strategy to build a good image in terms of the price they charge (supporting the need for value-for-money image). That is, they should first undercut the competition in terms of fees charged, and once they have established themselves within the market, they should slowly increase their fees to a comparable level to fees charged by other consultants.

2. Training Services: We recommend that for in-house courses, that the same approach be used in determining the costs of conducting such courses (e.g. taking into account the number of days, pre-training costs, etc. when determining the price they should charge for the course). We further recommend that for generic courses, participants be charged individually. The current price for a three-day course of K500 (approx. \$175) is an acceptable minimum level according to our research findings; though there might be a need to gradually increase this charge to take into consideration the rising costs (again, a penetration pricing approach). It is important that the ICS Unit give the impression that the trainees are leaving a course with the necessary knowledge to incorporate it into their jobs. A primary reason why large organisations don't use such services is because of the theoretical nature in which some courses are presented.

C. MARKET COVERAGE

In reviewing the past strategies concerning the ICS Unit of UNIDO, it appears as though they have initially attempted to cover a broad base of the consultancy and training needs within Malawi. By doing so, they have been able to assess the market needs in terms of consultancy and training services, and in turn, have been able to analyze their own efforts to determine which services they are best suited to offer.

However, after careful review of our findings, it appears as though the ICS Unit should cut back on the types of services offered and focus their market coverage on specific areas of concentration for which they can offer the best services. This holds true for both their consultancy services as well as their training services.

Taking into consideration the focused approach recommended in our section on Services Offered, we believe that the ICS Unit should consider marketing their services towards the segments of the market with the greatest demand for their specialised services. These segments include the following:

- * Manufacturing organisations within the urban areas of Malawi;
- * Manufacturing organisations producing industrial components, machinery, tools, construction materials, etc.;
- * Manufacturing organisations producing consumer goods, finished goods, food items, clothing, etc.; and,
- * Manufacturing organisations of medium and large size.

When focusing on these specific market segments, the ICS Unit should consider the Potential Market Profile Analysis performed within our Findings section.

The specific market segments that we recommend for the ICS Unit to focus on include:

Client Profile 1, and

Client Profile 2.

Our recommendations for the types of services that ICS Unit should offer and the segments of the market to focus on, are based on the current market demand for such services. In reviewing the findings of our study, we felt that the two key areas that need attention within Malawi include:

Industrial Engineering and Production Management, and

Marketing Management

The demand for such services within the segments recommended is very high. The current offering of such services by other organisations is very limited. Therefore, as a result, the demand for such services has not been met adequately. We believe that if the ICS Unit could focus on these two key areas of services and market their services towards the segments recommended, that they could fill that gap within the marketplace that has yet to be filled by any other consultancy and/or training organisations within Malawi.

To meet the current needs within the marketplace for industrial engineering and production management, and marketing management, will require both contraction and expansion on the part of the ICS Unit.

Necessary Contraction strategies for market coverage recommended include:

- * Cutting back on the types of consultancy and training services currently being offered by the ICS Unit (these are covered in detail in the Services Offered Section);

Necessary Expansion strategies for market coverage recommended include:

- * Hiring of four additional staff (2 - Industrial engineering and production management; 2 - Marketing Management) to specialise in offering of two key service areas in covering the intended market segments;
- * Development of an Advertising/Promotional to focus on the specialised areas of service and to be geared towards the intended market to be covered (e.g. Market segments: Client Profile 1 and 2);
- * Coordination with other UNIDO and UNDP programmes so as to eliminate duplication in efforts when implementing programmes, and perhaps to utilise resources in delivering services.

D. ADVERTISING AND PROMOTIONAL APPROACH

Certainly one of the most significant findings of our study was based on the fact that so few organisations knew that the ICS Unit existed. In light of these findings, an intensive effort must take place on the part of the ICS Unit in advertising and promoting their services.

Taking into consideration the recommendations for the services they offer, pricing strategy, and market coverage, the following advertising and promotional approach is recommended.

1. Promoting general awareness that the ICS Unit exists and can provide certain services to industrial organisations is the first step the ICS should take in publicising their services. In doing so, we recommend that an all-out effort be made in developing promotional brochures, pamphlets, training course contents, and short-term and long-term schedules of training courses they plan to offer. In developing such materials, it is very important that the ICS Unit not compromise on the quality of the materials they produce. In personal interviews, various consultants commented on the standard of materials that are produced and equated them to the standard of services offered.
2. Currently, other consultants and training institutions are sending their materials to the actual organisations without the organisation's request. In our personal interviews with the large organisations, the primary reason they send an employee on a training course, or engaged in consultancy services, was because they had all the information sent to them. Otherwise, organisations have no basis for comparison when deciding to send an employee on a course. Furthermore, in some cases the organisations weren't even planning on using such services, until or course, they received such materials explaining the course content, objectives, benefits, and costs. We therefore recommend that the ICS Unit send out materials to prospective clients informing them of their services and training courses being offered.
3. In addition to the production of such materials, we recommend that the ICS Unit send their representatives to the actual businesses to meet and talk with the necessary contact person within each organisation. By doing so, when and if the contact person decides to use consultancy and/or training services, they will have remembered meeting the ICS Unit representative and will also have additional printed materials describing what the ICS Unit can offer. In setting up such appointments, it is recommended that the utmost professionalism be used in discussing such matters, and that the first impression be the best impression possible. Various large organisations indicated that they would be more than willing, and showed sincere interest to meet with new consultants with new ideas.
4. We recommend also that the ICS Unit continue to advertise their services in the paper and periodically advertise their training courses in the paper as well as other printed sources (Daily times, Moni Magazine, Quest, etc.). By doing so, the ICS Unit can expand upon the potential client list and reinforce their message of quality services at an affordable price.

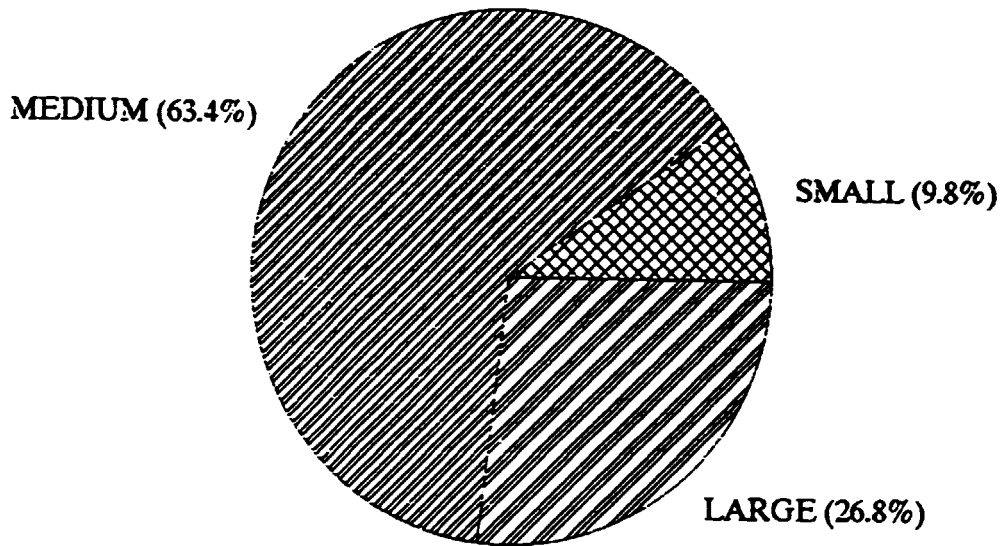
5. One primary complaint from organisations was the offering of courses during the day only. We would recommend that the ICS Unit also offer night courses to cater to the organisations concerns of releasing key resource people for a great length of time. Training institutions fail to realise that certain medium, and even large organisations lose money when they have to release a key manager for 3-5 days. This means that in addition to the fees they pay for the participant, they also give up productivity in the office. In reviewing the current night course selection at the Polytechnic, most evening classes are full, and requests sometimes can't be met. In other words, the demand for evening training is very high, and the ICS Unit should definitely consider offering evening courses. In promoting the evening courses, they should also do it well in advance, to give the organisation plenty of time to book in advance.

6. The overall message that one receives from advertising and promotion is key in deciding whether to use such services. In terms of consultancy and training, the key message that should be presented is 'professionalism' at a reasonable price. In developing printed materials, emphasis should be placed on the benefits that the organisation will receive in using such services. We also recommend that additional emphasis be placed on the 'need' to use such services. It should be presented in such a way so that organisations simply don't look at the services a luxury service, but rather as a needed service to survive in a dynamic marketplace.

FIGURES

FIGURE 1

PERCENTAGE DISTRIBUTION OF ORGANISATIONS SURVEYED
BY SIZE OF ORGANISATION



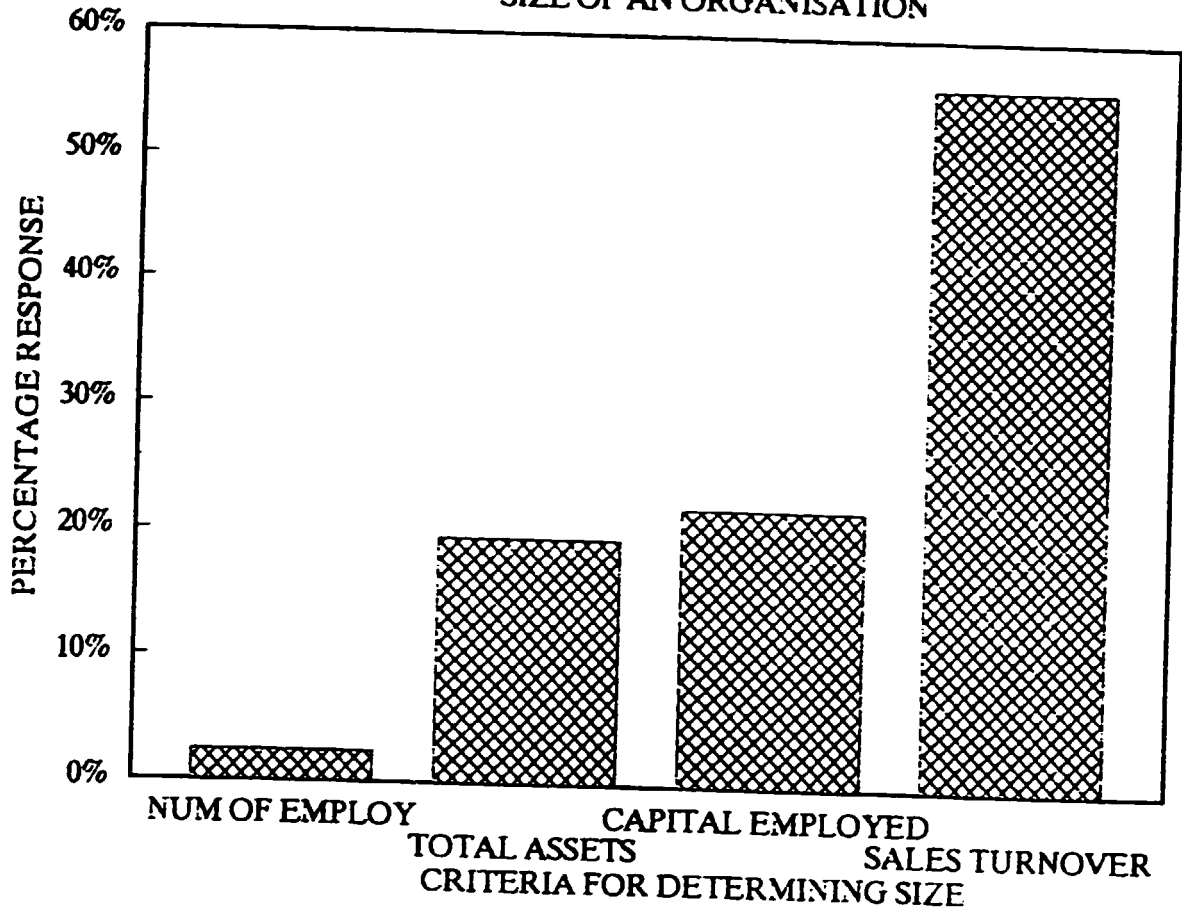
Note:

Basis of Classification

Classification of an organization as belonging to Small/Medium/Large scale was based on how the individual organization categorised themselves.

FIGURE 2

PRIMARY DETERMINANTS IN DETERMINING SIZE OF AN ORGANISATION

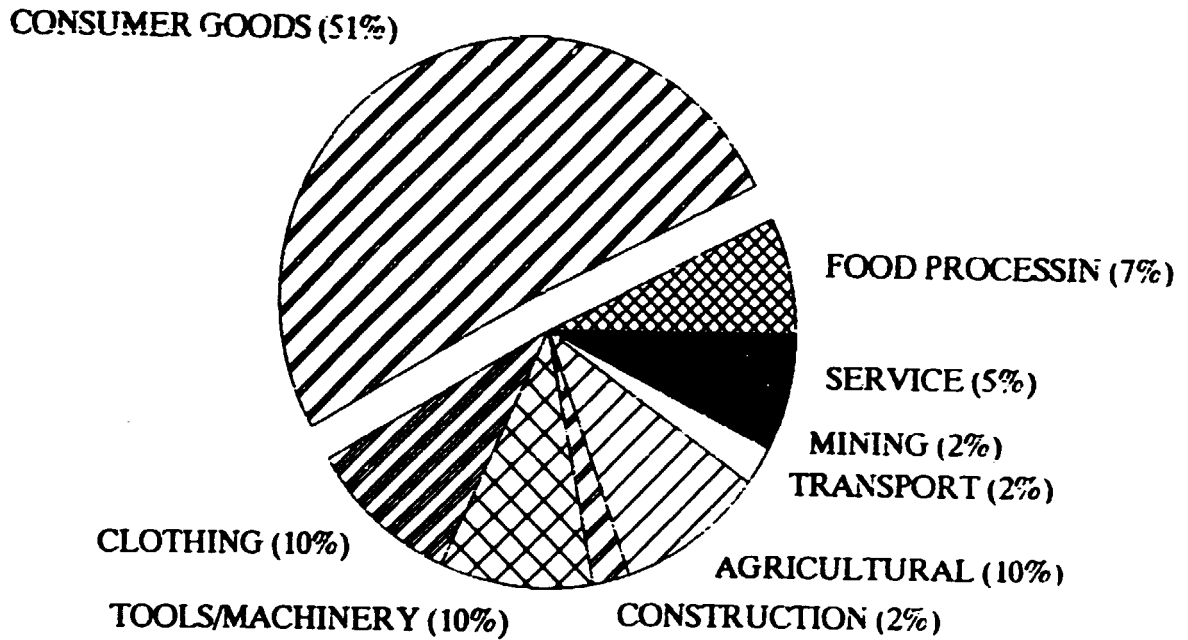
**Note:**

This graph indicates percentage of respondents who specified the various criterions for determining size of organization. (50% specified Sales Turnover).

Index:

NUM OF EMPLOY : Number of Employees

FIGURE 3
DISTRIBUTION OF ALL FIRMS
SURVEYED IN MALAWI BY INDUSTRY ACTIVITIES



Note:

Management of Trading Firms included.

FIGURE 4

DISTRIBUTION OF MANUFACTURING FIRMS SURVEYED IN MALAWI BY INDUSTRY ACTIVITIES

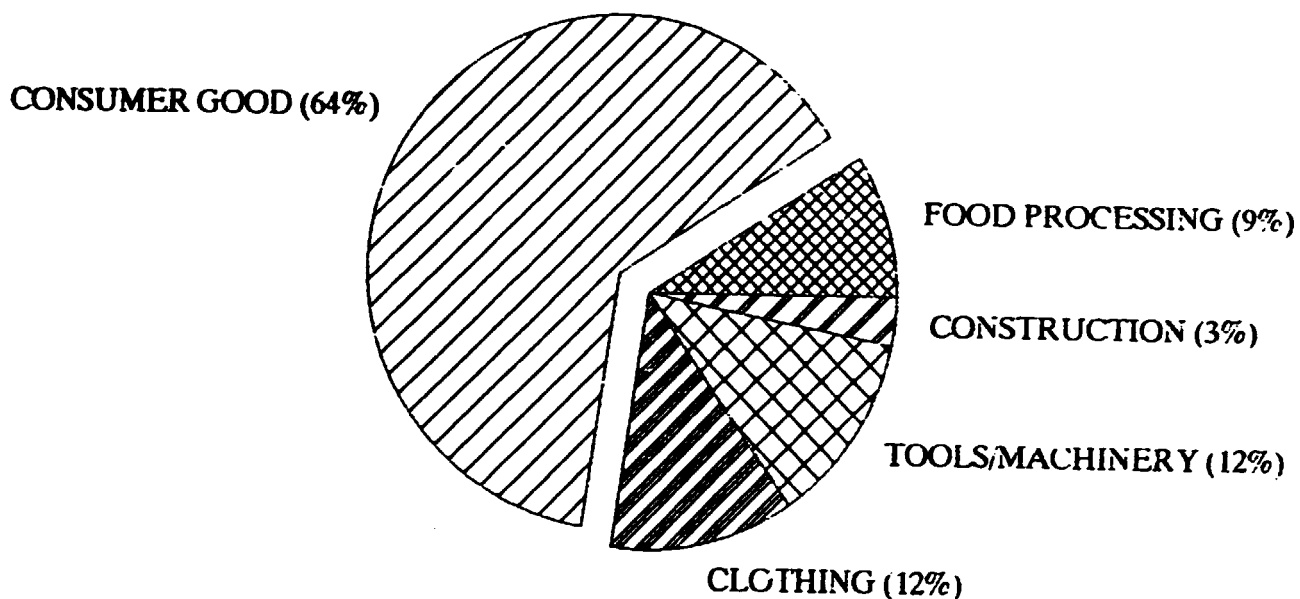
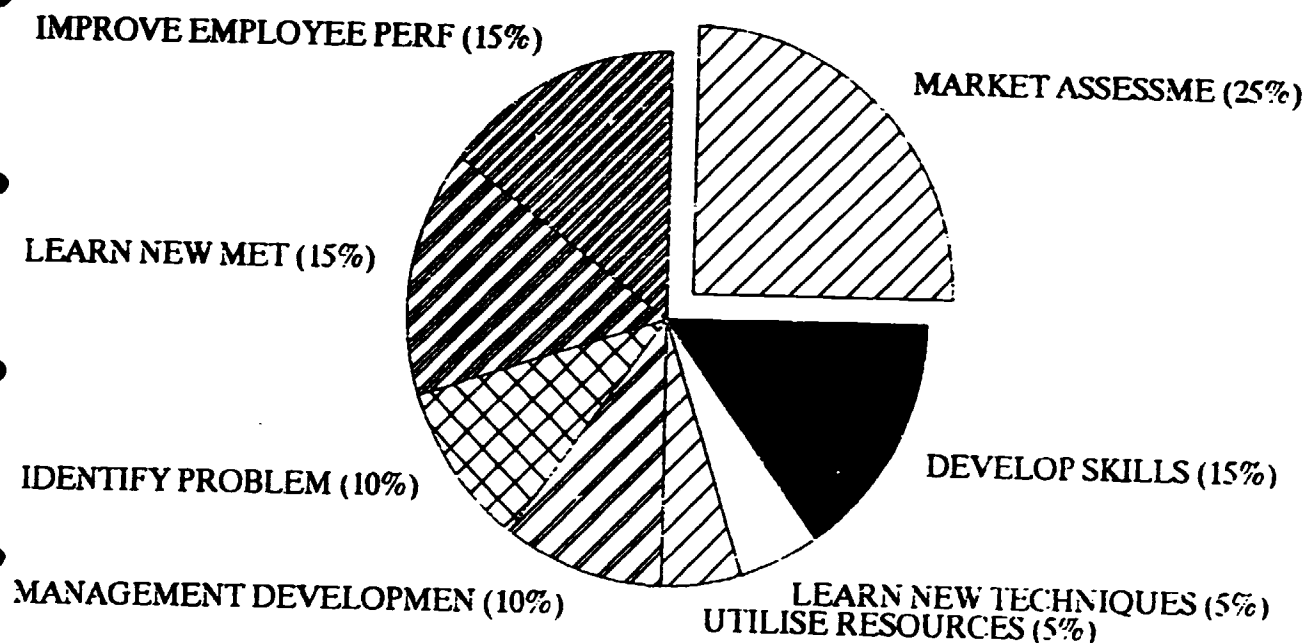


FIGURE 5
 PRIMARY REASONS WHY ORGANISATIONS USE
 CONSULTANCY SERVICES WITHIN MALAWI

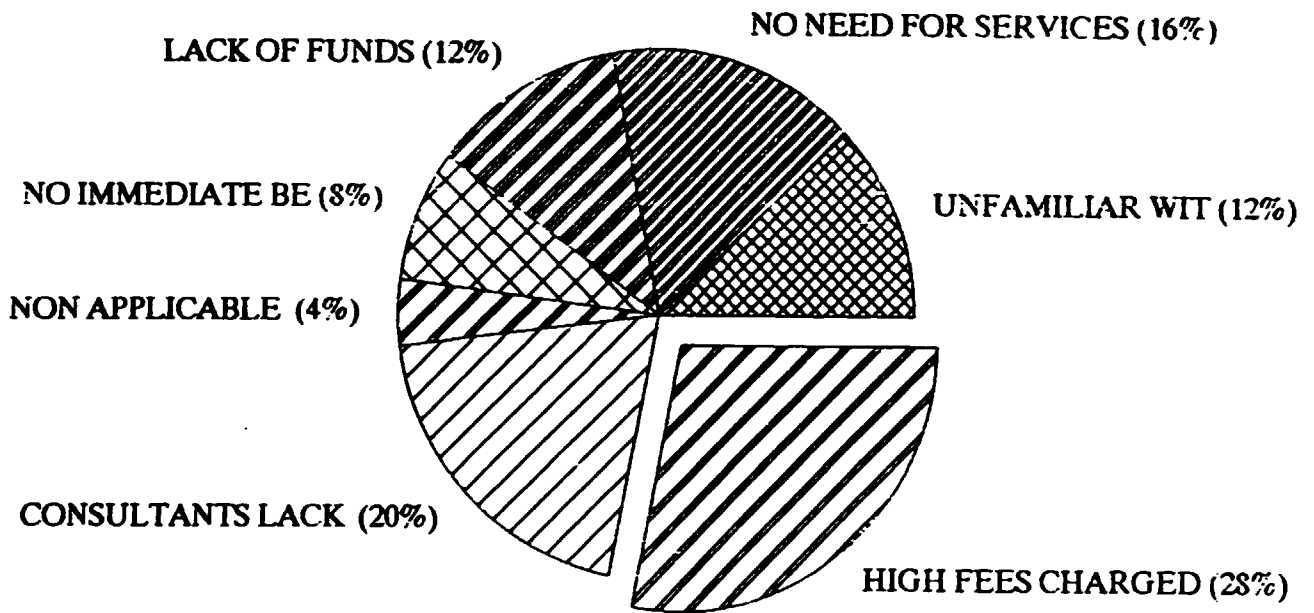


INDEX:

IMPROVE EMPLOYEE PERF	:	Improve Performance of Subordiantes
LEARN NEW MET	:	Learn New Methods of Operation
MANAGEMENT DEVELOPMEN	:	Management Development
UTILISE RESOURCES	:	Improve Resource Utilization
LEARN NEW TECHNIQUES	:	Learn New Techniques for Productivity Improvement
MARKET ASSESSME	:	Need to assess the Market in which Organi- zation is Operating

FIGURE 6

PRIMARY REASONS WHY ORGANISATIONS DO NOT USE CONSULTANCY SERVICES WITHIN MALAWI

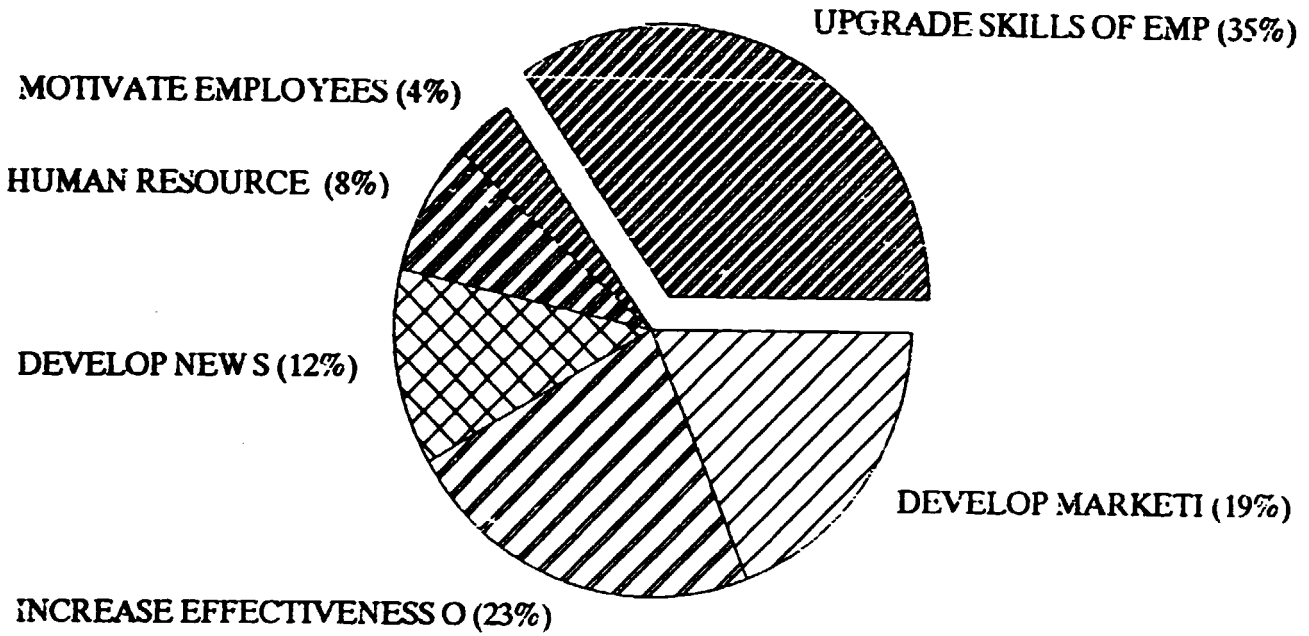


INDEX

- | | | |
|-----------------------|---|-----------------------------------------------------------|
| UNFAMILIAR WITH | : | Unaware of Benefits of Consultancy |
| NO IMMEDIATE BENEFITS | : | Perceived Low Return on Investment |
| NON APPLICABLE | : | Consultancy seen as not Applicable to Organization |
| NO NEED FOR SERVICES | : | Lack of Knowledge of the Organization by the Consultants. |

FIGURE 7

PRIMARY REASONS WHY ORGANISATIONS USE
TRAINING SERVICES WITHIN MALAWI

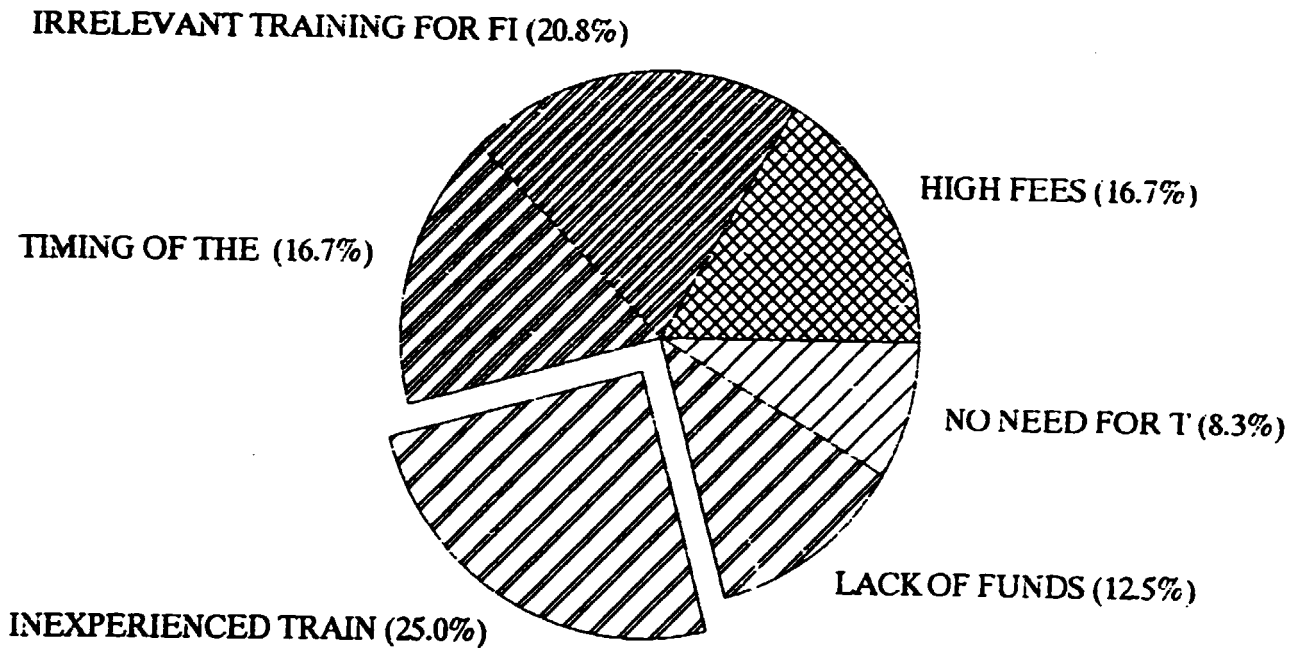


INDEX:

DEVELOP MARKETI	:	Development of Marketing Skills
DEVELOP NEW S	:	Develop New Skills
HUMAN RESOURCES	:	Human Resource Development
INCREASE EFFECTIVENESS O	:	Increase Effectiveness of Employees
UPGRADE SKILLS OF EMP	:	Upgrade Skills of Employees

FIGURE 8

PRIMARY REASONS WHY ORGANISATIONS DO NOT USE
TRAINING SERVICES WITHIN MALAWI

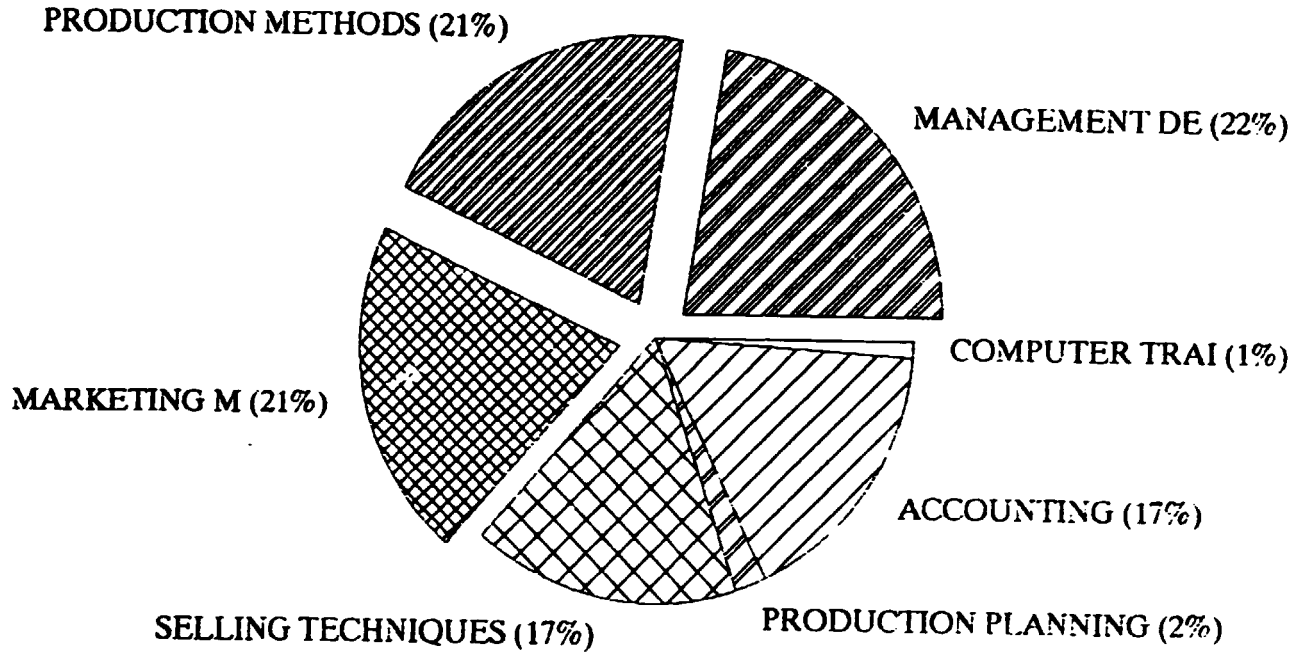


INDEX:

IRRELEVANT TRAINING FOR F1	:	Offers of Irrelevant Training for Firms
NO NEED FOR T	:	No Need for Training
LACK OF FUNDS	:	No Funds Budgeted for Training
TIMEING OF THE	:	Short Duration or Poor Timing
INEXPERIENCED TRAIN	:	Inexperienced Trainers

FIGURE 9

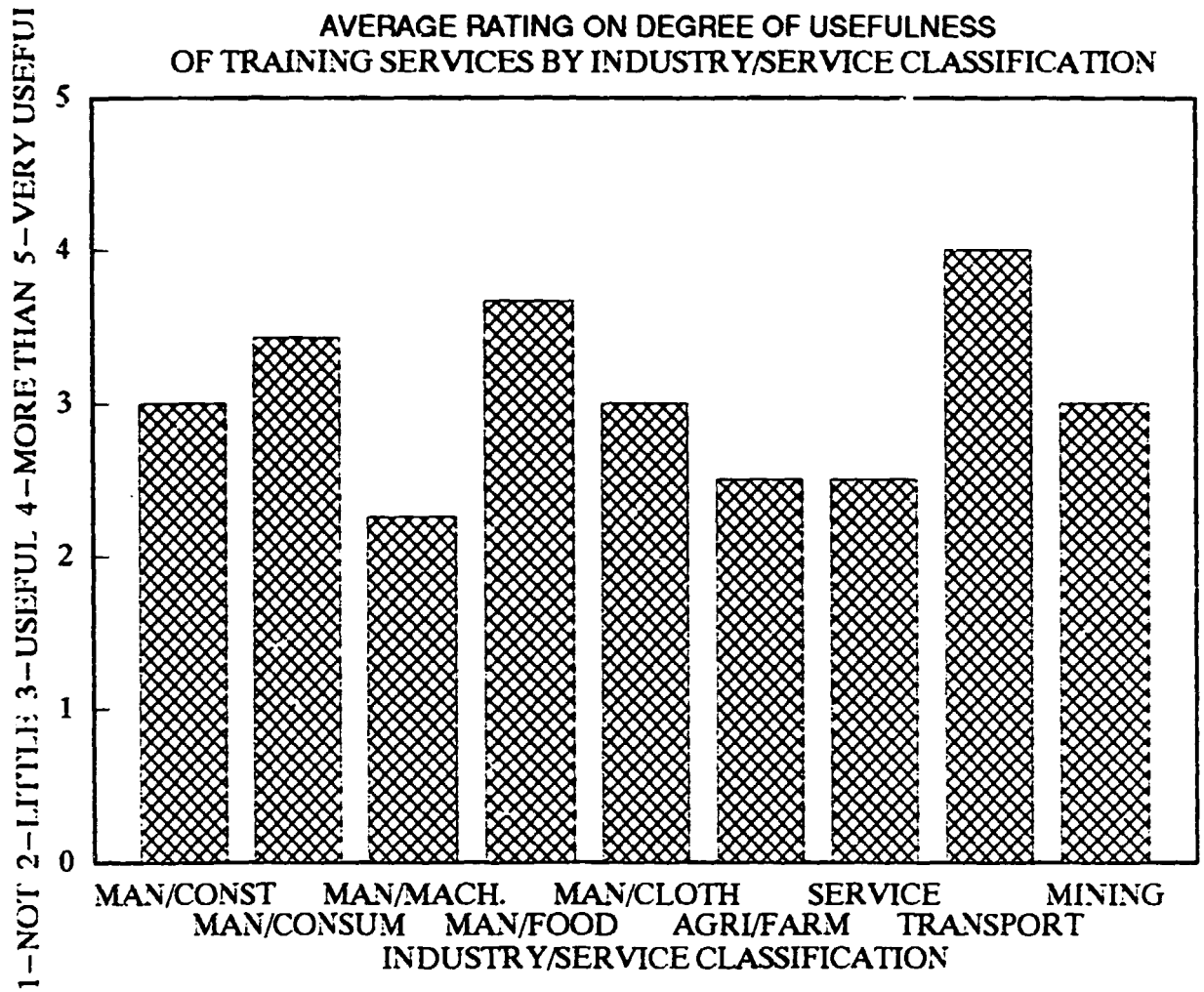
TRAINING SERVICES FOR WHICH POTENTIAL CLIENTS
EXPRESSED INTEREST IN USING



INDEX

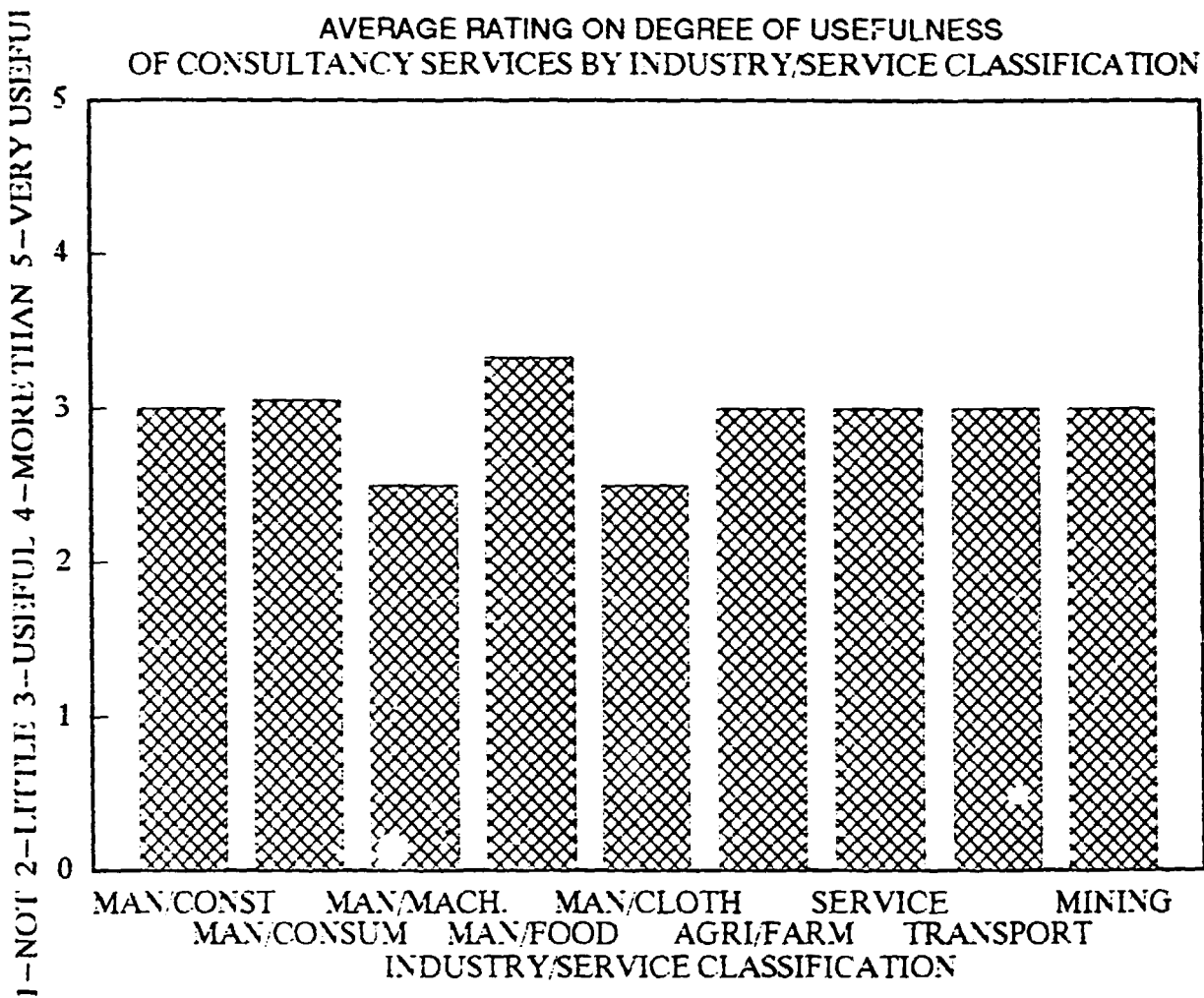
- COMPUTER TRAIN : Computer Training
- MANAGEMENT DE : Management Development
- MARKETING M : Marketing Management

FIGURE 10

**INDEX**

MAN/CONST	:	Manufacturing in the Construction Industry
MAN/MACH	:	Manufacturing of Machinery/Tools & Industrial Components
MAN/C	:	Manufacturing in the Clothing Industry
SERVICE	:	Service Industries
MINING	:	Mining Industry
TRANSPORT	:	Transportation Industry
MAN/CONSUM	:	Manufacturing in Consumer Items
MAN/FOOD	:	Manufacturing in Food Processing
AGRI/FARM	:	Agricultural Farming

FIGURE 11



INDEX:

- MAN/CONST : Manufacturing in the Construction Industry
- MAN/MACH : Manufacturing of Machinery/Tools & Industry Components
- MAN/C : Manufacturing in the Clothing Industry
- SERVICE : Service Industries
- MINING : Mining Industry
- TRANSPORT : Transportation Industry
- MAN/CONSUM : Manufacturing in Consumer Items
- MAN/FOOD : Manufacturing in Food Processing
- AGRI/FARM : Agricultural Farming

FIGURE 12

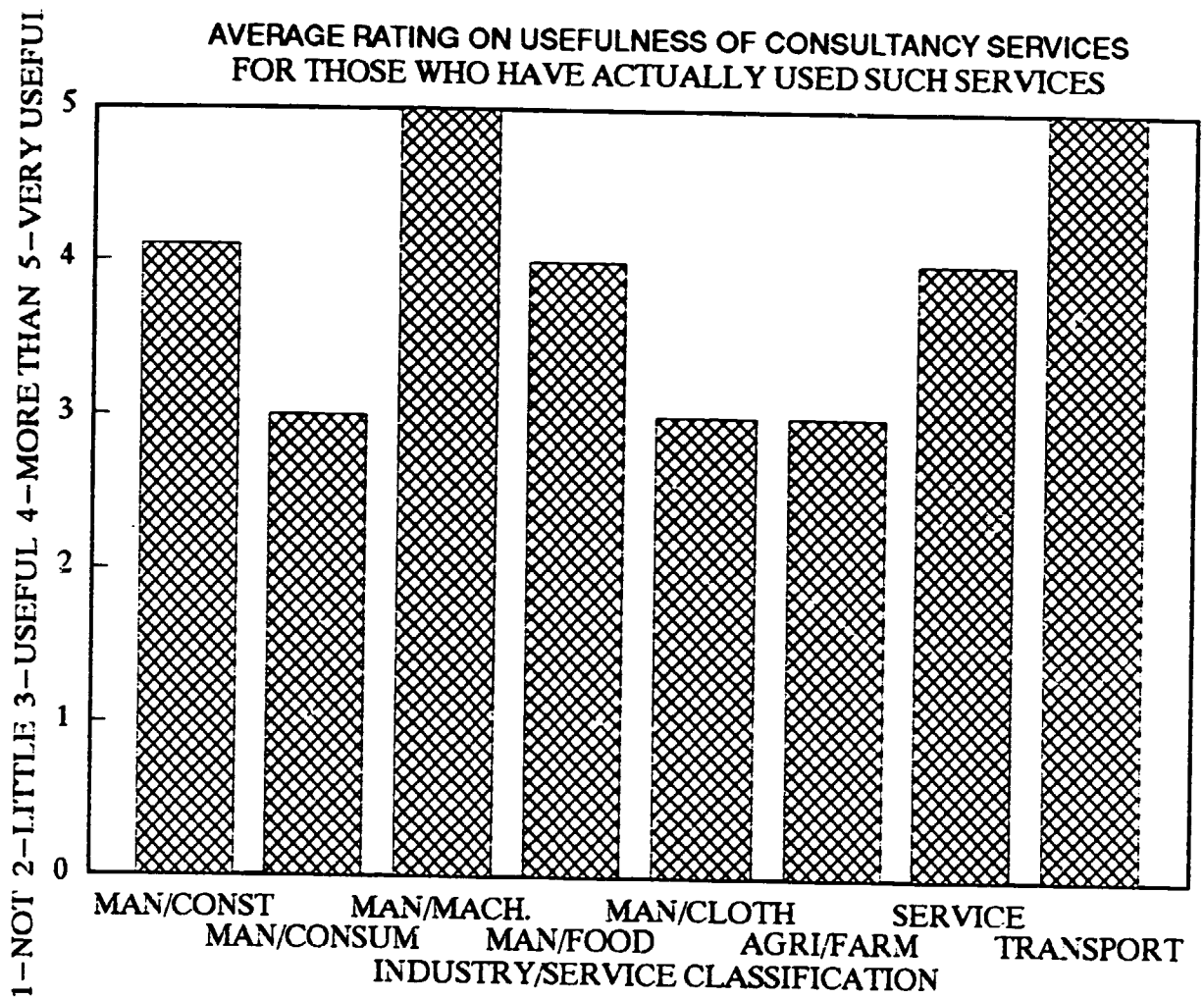


FIGURE 13

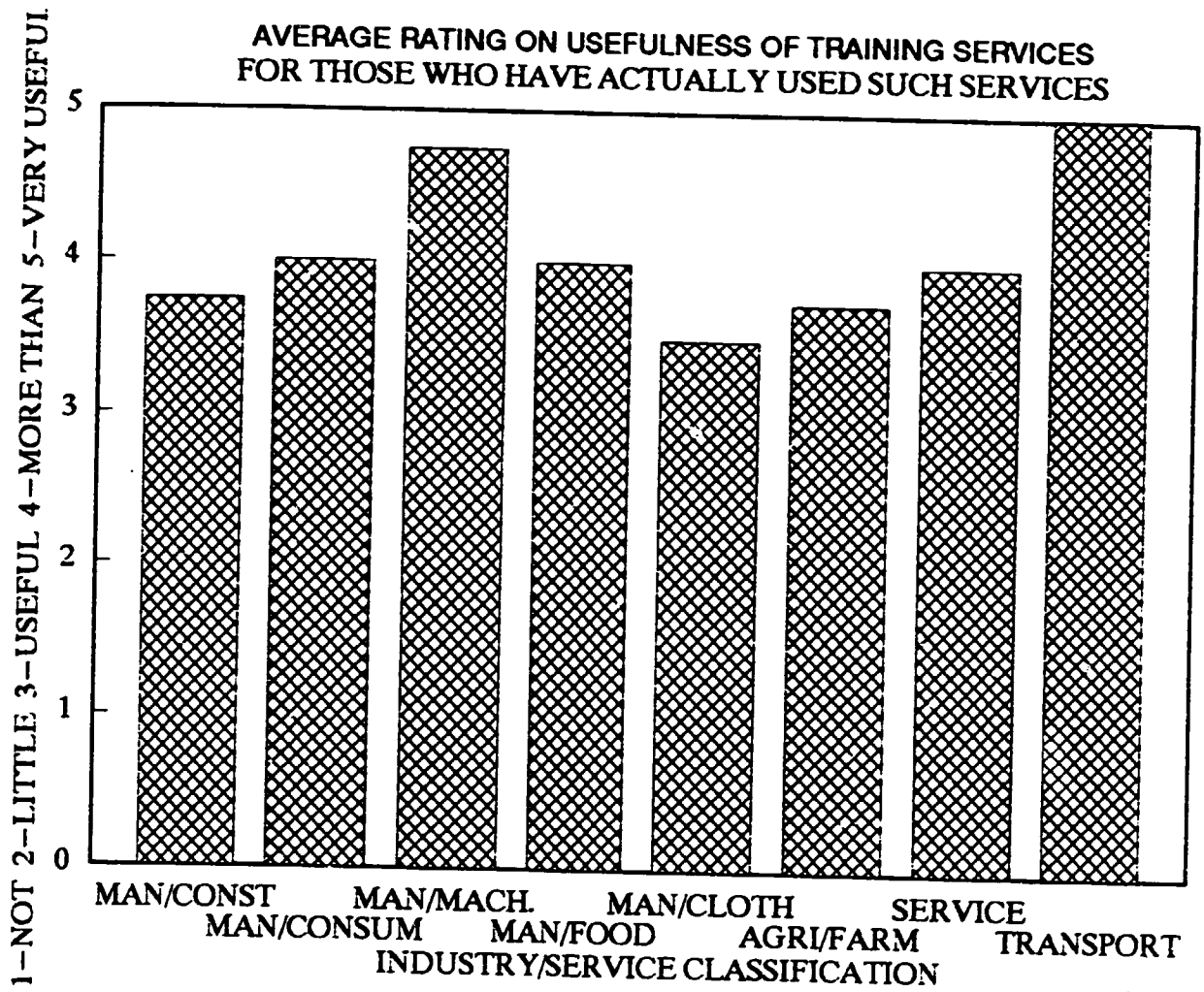
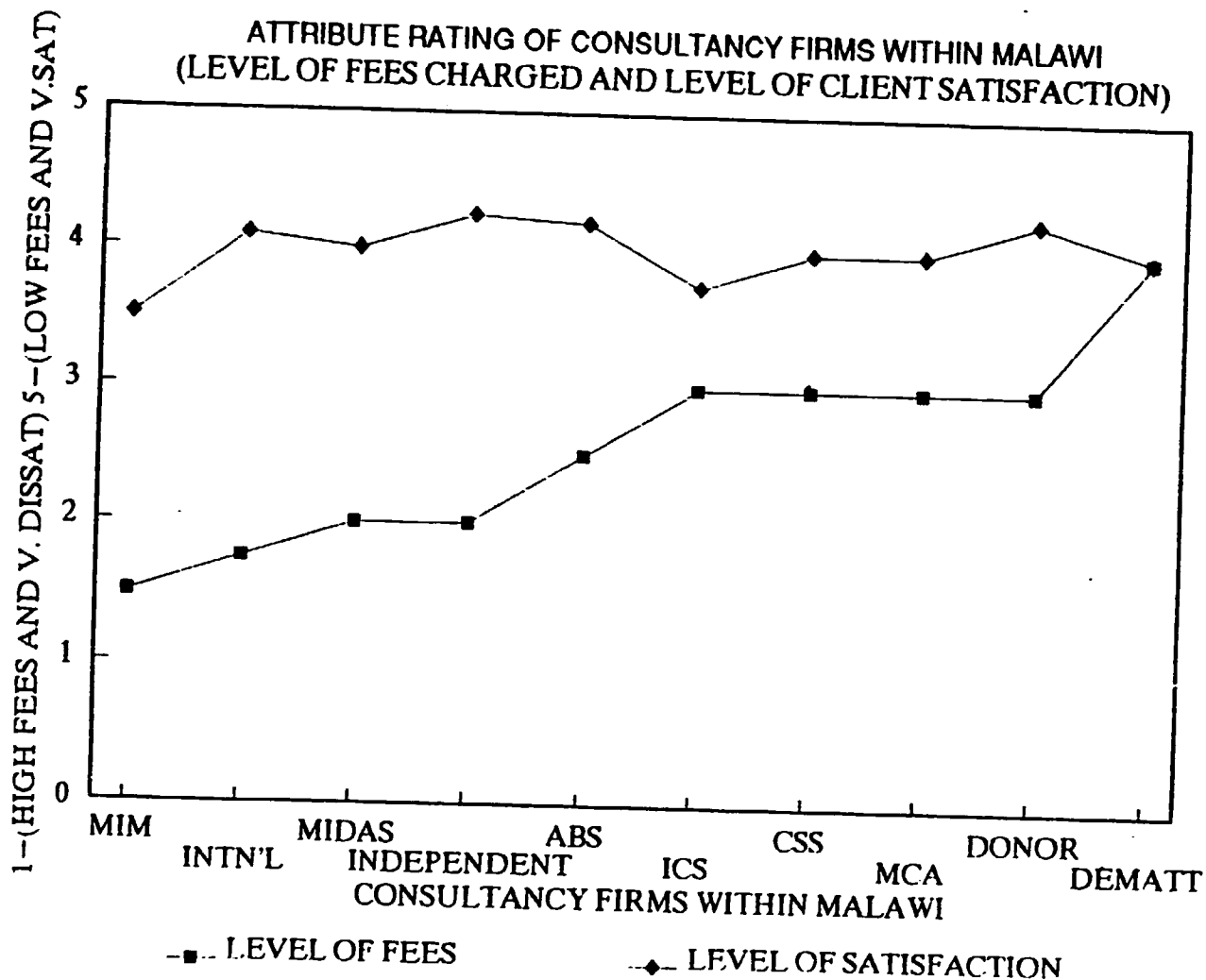


FIGURE 14

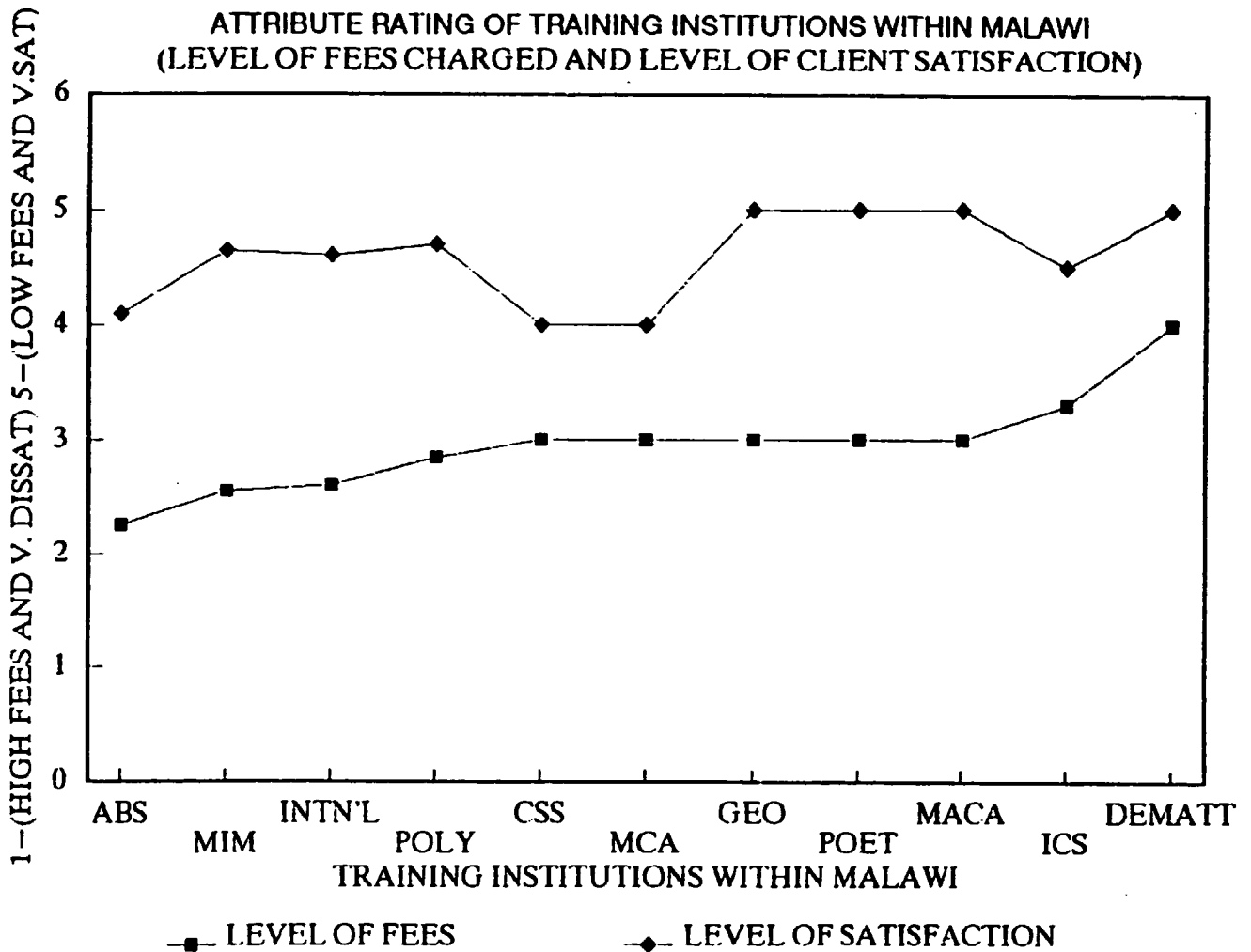


NOTE: Sample size was small, so that the above graph may not be a true representation of the survey population's level of satisfaction with consultancy and/or view of the level of fees charged.

Index:

ABS	: Applied Business Systems
CSS	: Computer Sales Services
DEMATT	: Development of Malawian Traders Trust
DONOR	
ICS	: Industrial Consultancy Services
INDEPEND	: Independent Consultants (based in Malawi)
INTN'L	: International Consultants (from outside Malawi)
MCA	: Management Consultancy and Agencies Limited
MIDAS	: Midas Consultancy Services
MIM	: Malawi Institute of Management

FIGURE 15

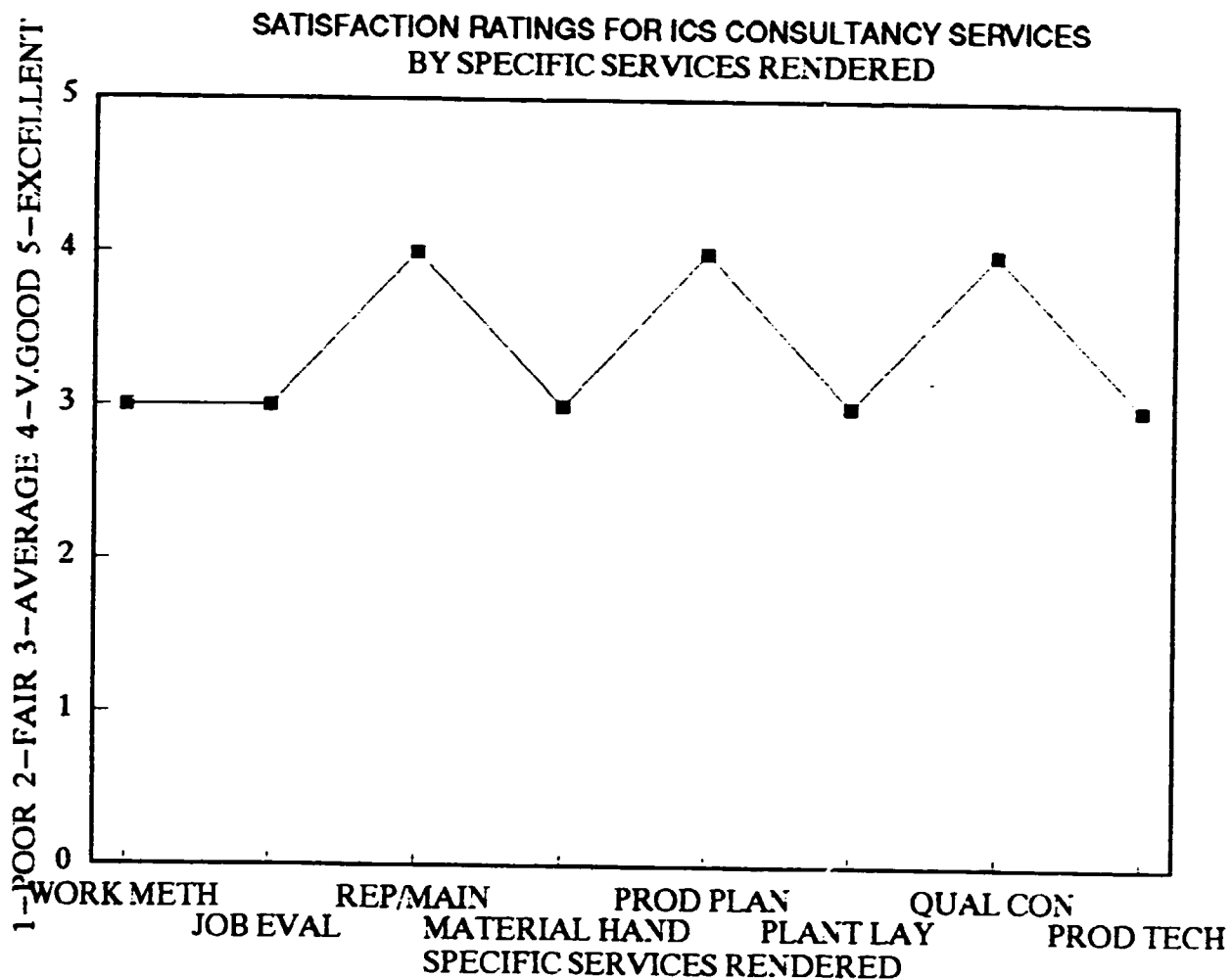


NOTE: Sample size was small, so that the above graph may not be a true representation of the survey population's level of satisfaction with training and/or view of the level of fees charged.

Index:

ABS	: Applied Business Systems
CSS	: Computer Sales & Service
DEMATT	: Development of Malawian Traders Trust
GEO	: Geo Services
ICS	: Industrial Consultancy Services
INTN'L	: International Consultancy Services
MACA	: Malawi College of Accountancy
MIM	: Malawi Institute of Management
POET	: Project Officers & Entrepreneurs Training Project
POLY	: Polytechnic (i.e. Management Centre)

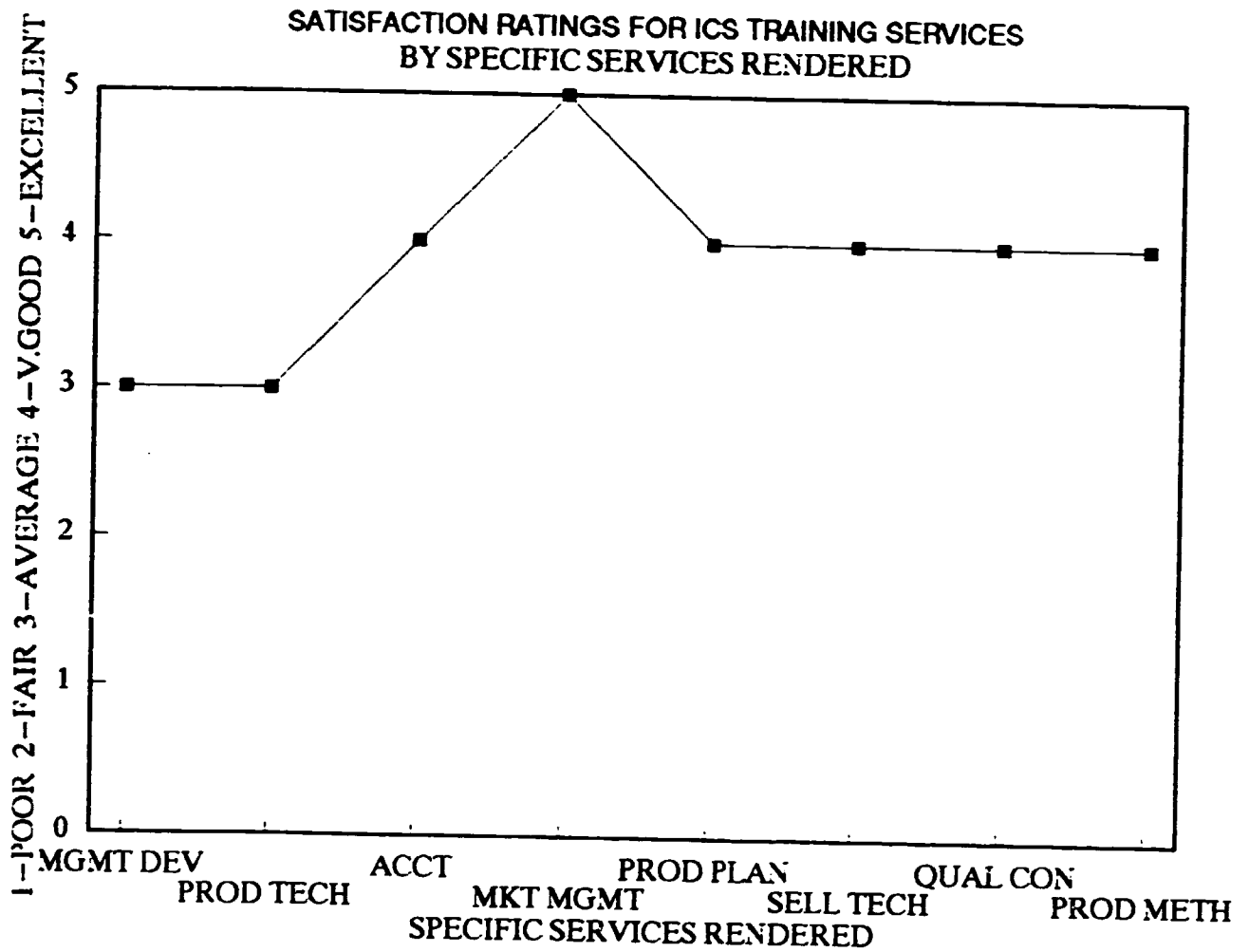
FIGURE 16



INDEX:

- | | | |
|---------------|---|------------------------|
| WORK/METH | : | Work Study Methods |
| REP/MAIN | : | Repair and Maintenance |
| PRO PLAN | : | Production Planning |
| QUALCON | : | Quality Control |
| JOB EVAL | : | Job Evaluation |
| MATERIAL HAND | : | Material Handling |
| PLANT LAY | : | Plant Layout |
| PROD TECH | : | Production Techniques |

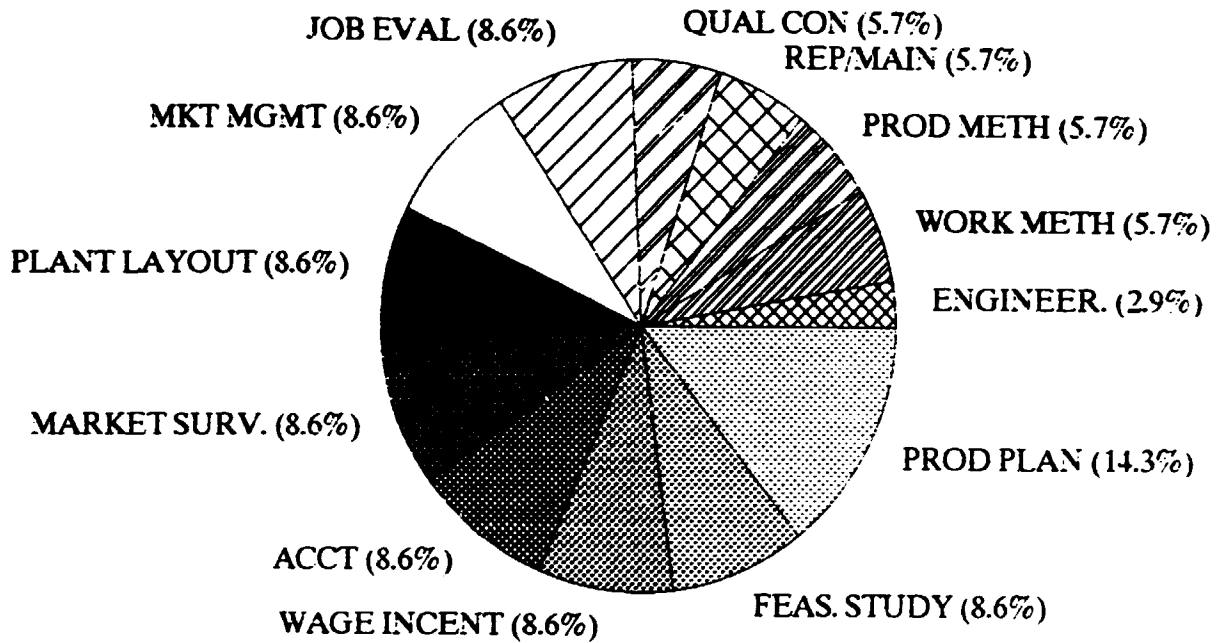
FIGURE 17

**Index:**

ACCT	: Accounting
MGMT DEV.	: Management Development
MKT MGMT	: Marketing Management
PROD METH	: Production Methods
PROD PLAN	: Production Planning
PROD TECH	: Production Techniques
QUAL CON	: Quality Control
SELL TECH	: Selling Techniques

FIGURE 18

CONSULTANCY SERVICES FOR WHICH POTENTIAL CLIENTS
EXPRESSED INTEREST IN USING



INDEX:

ACCT	:	Accountancy
ENGINEER	:	Engineering
FEAS. STUDY	:	Feasibility Study
JOB EVAL	:	Job Evaluation
MARKET SURV	:	Marketing Surveys
MKT MGMT	:	Marketing Management
PROD METH	:	Production Methods
PROD PLAN	:	Production Planning
REP/MAIN	:	Repairs and Maintenance
QUAL CON	:	Quality Control
WAGE INCENT	:	Wage Incentive
WORK METH	:	Work Study Methods

TABLES

Table 1

ANALYSIS OF FIRMS FACING PROBLEMS CROSS TABULATED WITH THE USE OF CONSULTANCY AND/OR TRAINING SERVICES		
	YES	NO
PROBLEM	88%	12%
USED CONSULTANCY SERVICES	61%	39%
USED TRAINING SERVICES	71%	29%

- 19% OF THOSE WHO HAVE FACED PROBLEMS HAVE NEVER CONTRACTED EITHER CONSULTANCY OR TRAINING SERVICES.
- 91% OF LARGE ORGANIZATIONS HAVE FACED PROBLEMS AND HAVE CONTRACTED BOTH CONSULTANCY AND TRAINING SERVICES
- 100% OF ALL SMALL ORGANIZATIONS HAVE FACED PROBLEMS. OF THESE, 75% HAVE USED BOTH CONSULTANCY AND TRAINING SERVICES.
- 85% OF ALL MEDIUM SIZED FIRMS HAVE FACED PROBLEMS. OF THESE, 23% HAVE NEVER USED EITHER CONSULTANCY OR TRAINING SERVICES AND ONLY 58% OF MEDIUM SIZED FIRMS FACING PROBLEMS HAVE USED CONSULTANCY OR TRAINING SERVICES.

Table 2

FAMILIAR WITH ICS	34%
NOT FAMILIAR WITH ICS	66%
FAMILIAR AND USED ICS SERVICES	71%
FAMILIAR AND DID NOT USE ICS SERVICES	29%
FAMILIAR WITH ICS THROUGH:	
WORD OF MOUTH	25%
PRINT (MEDIA ADVERTISEMENTS)	69%
RADIO	6%
HAVE USED SERVICES:	
CONSULTANCY SERVICES	25%
TRAINING SERVICES	90%
BOTH CONSULTANCY AND TRAINING SERVICES	30%
HAVE USED ICS SERVICES AND ARE WILLING TO DO SO AGAIN	85%
HAVE NOT USED ICS SERVICES BUT ARE WILLING TO BE INFORMED	93%

INDUSTRY/SERVICE CLASSIFICATION SCHEME

	COMPANY	CONTACT	PHONE	INDUSTRY/SERVICE CLASSIFICATION CODE
1.	Press and Shire Clothing Ltd. Murry Road P O Box 306 Lilongwe	Mr M J Chikankheni General Mgr.	720566	L-Man-CTH-5-31
2.	Pipe Extruders P O Box 30041 Lilongwe 3	Mr Sabola Personnel Mgr.	765388	L-Man-CSM-3-24
3.	Bitumen Products P O Box 30369 Lilongwe 3	Mr J Van Niekerk General Mgr.	765755	S-Man-Con-3-14
4.	Steel Works P O Box 691 Lilongwe	Dr P A Moodie Managing Director (Mr Mwale - PM).	765211/177	M-Man-Mch-4-11
5.	Malawi Pharmacies P O box 51041 Limbe	Mr M Msuku - Marketing Mgr.	640833	M-Man.CSM-4-34
6.	Textile Craft Limited P O Box 80136 Maselema Blantyre 8	Mr P Nkhwazi Personnel Officer	650770	M-Man-CTH-3-12
7.	NOIL P O Box 567 Blantyre	Mr Manjolo Personnel Manager	670155	M-Man-FPR-3-34
8.	Shell Malawi Ltd. P O Box 407 Blantyre	Mr N Dredge Financial Manager	671200	L-Ser-SMT -4-23
9.	Lever Brothers P O Box 5151 Limbe	Mr Tambula Personnel Manager	651000	L-Man-CSM-3-33

10.	Malawi Railways P O Box 5492 Limbe	Mr M J Banda Chief Personnel Manager	640844	L-TRA-TRN-4-11
11.	Montfort Press P O Box 5592 Limbe	Mr B P Bande	651131	M-Man-CSM-3-32
12.	Consolidated Textiles P O Box 5350 Limbe	Mr H Mbodole Financial Mgr.	650193	M-Man-CSM-3-12
13.	Royale Chemicals Enterprises Limited P O Box 51048 Limbe	Mr Panjwani	651299	M-Man-CSM-3-12
14.	Carlsberg (Mw) Limited P O Box 1050 Blantyre	Dr M Mumbwa Human Resources Manager	670133	L-Man-F-FPR-1-34
15.	Chillington Agrimal Ltd. P O Box 143 Blantyre	Mr D D Nyangulu Production Manager	670933	M-Man-CSM-4-21
16.	Portland Cement P O Box 523 Blantyre	Mr M S Miteche Factory Manager	671933	M-Min-EXT-2-33
17.	Plastic Products P O Box 907 Blantyre	Mr Kalulu Production Manager	670455	M-Man-CSM-4-12
18.	Bata Shoe Company P O Box 936 Blantyre	Mr Kansichi Production Manager	670511	L-Man-CTH-3-11

13.	David Whitehead & Sons Limited P O Box 2095 Blantyre	Mr Chaguluka	670644	L-Man-CSM-3-24
20.	Enterprise Containers P O box 30477 Chichiri Blantyre 3	Mr Mafubza	670894	M-Man-CSM-3-34
21.	Hardware & General Dealers P O Box 248 Blantyre	Mr G Kazombo Mwale	671138	M-Man-MCH-4-13
22.	IGL P O Box 30500 Chichiri Blantyre 3	Mr Ndenya Company Accountant	671611	M-Man-MCH-3-23
23.	Nicholas Kiwi Laboratories P O Box 709 Blantyre	Mr Mwale	671900	M-Man-CSM-3-12
24.	Cold Storage P O Box 575 Blantyre	Dr. R K D Phoya General Manager	670122	M-Man-FPR-1-12
25.	Candlex P O Box 80140 Maselema Blantyre 8	Mr Ganiza Sales Manager	650600	M-Man-CSM-3-44
26.	Leopard Match Company P O Box 30071 Chichiri Blantyre 3	Mr J Bannister General Manager	671722	M-Man-CSM-2-12
27.	Chloride Batteries P O Box 446 Blantyre	Mr Mbvundula Marketing Manager	671391	M-Man-SCM-3-23
28.	Leather & Luggage Manufacturing Ltd. P O Box 30300, Chichiri Blantyre 3	Mr Patel Managing Director	671322/ 671857	M-Man-CSM-3-21

29.	Dulux Limited P O Box 30013 Chichiri Blantyre 3	Mr K Chirwa Accountant	671522	M-Man-CSM-4-14
30.	General Tinsmiths P O Box 198 Blantyre	Mr Y Mukadam Engineer	671955	M-Man-CSM-4-21
31.	Malawi Iron & Steel Corp. P O Box 2165 Blantyre	Mr C G C Phiri	671455	S-Man-Mch-3-14
32.	Leyland DAF (M) Ltd. P O Box 581 Blantyre	Mr S Z Chikopa Director, Sales & Marketing	670777	M-Ser-SMT-3-11
33.	Madzimayera Soap Factory P O Box 154 Mchinji Malawi	W P Mwale Business Manager/ Director		S-Man-CSM-4-34
34.	Lujeri Tea Estates Limited P O box 133 Mulanje	Mr P P Walker Finance Director	462281	M-Agr-FFP-2-11
35.	I Conforzi (Tea & Tobacco) Limited P O Box 1 Thyolo	Mrs M J Booth Company Secretary	472400	L-Agr-FFP-5-12
36.	Naming'omba Tea Estates Ltd. P O Box 2 Thyolo	S Kapito Human Resources Manager	472300	L-Agr-FFP-3-12
37.	Satemwa Tea Estates Ltd. P O Box 6 Thyolo	Mr J M Williams	472233	M-Agr-FFP-4-12
38.	Malawi Distilleries P O Box 924 Blantyre	Mr Kadammanja Personnel Manager	670722	L-Man-CSM-3-24

39.	Encor Products Ltd. P O Box 425 Blantyre	Mr Chirambo Accountant	670955	M/Man/CSM-3-2 1
40.	B.A.T P O Box 28 Blantyre	Mr J Kettle General Manager	670033	L-Man-CSM-1-2 3
41.	Tawa Melamine Industries Limited P O Box 30653 Blantyre 3	Mr S S A Mgwadira Accounts/Sales Officer	671243	S-Man-CSM-1-2 2

APPENDICES

APPENDIX 1

INDUSTRIAL SERVICES QUESTIONNAIRE (ISQ)

SECTION I
GENERAL INFORMATION

1.1 NAME OF COMPANY/ORGANISATION: _____

1.2 ADDRESS: _____

Telephone: _____

Telex: _____

Fax: _____

1.3 PARTICULARS OF RESPONDENT:

Name: _____

Designation: _____

1.4 UNITS: (ie. Production, Geographical Location, Services,
Distribution, etc.)

(Please give details of your organisations different units)

Serial Number	Location	Number of Employees	Type of Activity (Please tick where Applicable)		
			Product.,	Dist.,	*other
1.	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Please Specify

1.5 OWNERSHIP: (show by %)

A. Private Sector	Malawian Owned	Foreign Owned	*Other
1.5.1 Sole Proprietorship	_____	_____	_____
1.5.2 Partnership	_____	_____	_____
1.5.3 Private Co. Ltd.	_____	_____	_____
1.5.4 Other (please specify) _____	_____	_____	_____

* Please Specify

B. Public Sector	Malawi Owned	Foreign Owned	*Other
1.5.5 Wholly owned by MG	_____	_____	_____
1.5.6 Ownership by MG through Public Corp.	_____	_____	_____
1.5.7 Parastatal Company	_____	_____	_____
1.5.8 Other (please specify) _____	_____	_____	_____

* Please Specify

1.6 Which of the following criteria would your organisation consider the MOST important in determining its size? (Please tick one)

- Sales Turnover Capital Employed Total Assets
 Number of Employees Other (Please Specify: _____)

1.7 Based on the above criteria, what would your organisation consider its size to be? (Please tick where appropriate)

	Large	Medium	Small
1.7.1 Sales Turnover:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.7.2 Capital Employed:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.7.3 Total Assets:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.7.4 Number of Employees:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.7.5 Other (Please Specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1.8 Does your organisation/company consider its overall size to be: (Please tick one)

Large
 Medium
 Small
 Other
 (Please Specify: _____)

1.9 PRODUCTS/SERVICES:

Product Type (Please Specify)

% Of Total Sales
(Please give best estimate)

Service Type (Please Specify)

% Of Total Sales
(Please give best estimate)

1.10 EMPLOYEE DISTRIBUTION:

% of Total Employees

1.10.1	Management	_____
1.10.2	Supervisory Staff	_____
1.10.3	Workers	_____
1.10.4	Others (please specify)	_____

SECTION 2
INDUSTRY/SERVICE CLASSIFICATION

TYPE OF INDUSTRY: To which industry group does your organisation/company belong?

(Please tick as appropriate)

- 2.1.1 Mining/Extractions
- 2.1.2 Manufacturing
- 2.1.3 Agriculture
- 2.1.4 Service
- 2.1.5 Other (Please Specify: _____)

ACTIVITIES: Which type of activity(s) is your organisation/company involved in?

(Please tick as appropriate)

- 2.2.1 Manufacturing of Industrial Components: Machinery, tools, etc.
- 2.2.2 Manufacturing of Finished Goods: Office Supplies, Consumer items, Toiletry items, etc.
- 2.2.3 Clothing and/or Shoe Manufacturing
- 2.2.4 Agricultural Farming and Marketing
- 2.2.5 Food processing/milling/butchery/Dairy/canning/etc.
- 2.2.6 Food processing/bakery/Confectionery
- 2.2.7 Food processing/Restaurant
- 2.2.8 Wholesale/Retail
- 2.2.9 Transportation: Cargo/hauling
- 2.2.10 Transportation: Travel/Taxi/Bus
- 2.2.11 Carpentry: Bricklaying, Construction

2.2.12 Other (Please Specify: _____)

SECTION 3
COMPETITION

3.1 Do you know of any other organisations/companies that are within the same industry as your organisation/company? (please tick one)

YES NO

3.2 Would you consider the competition your organisation/company faces as: (please tick one)

Very Tough Tough Reasonable Weak None existent

3.3 What size of the current market share (in terms of Sales) does your organisation/company control? (please tick one)

0%-25% 25%-50% 50%-75% 75% or greater

SECTION 4
CONSULTING AND TRAINING INDUSTRY

4.1 To what degree would your organization measure the usefulness of Consultancy Services in Malawi? (Please tick one)

very useful (5)	More than Useful (4)	Useful (3)	A Little Useful (2)	Not Useful at all (1)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.2 To what degree would your organization measure the usefulness of Training Services in Malawi? (Please tick one)

a) In-house:

5	4	3	2	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

b) External (Outside the organization)

5	4	3	2	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

c) Other (Please specify _____)

5	4	3	2	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.3 Are you aware of any organizations that have in the past or are currently using either Consultancy or Training Services? (Please tick one).

Yes No

4.4 If so, is your organization aware of impact that the services have had on such organizations? (Please tick one)

Yes No

4.5 If YES, please indicate to what degree of usefulness these services have had on such organizations. (Please tick one)

Very Useful (5)	More than Useful (4)	Useful (3)	A little Useful (2)	Not useful at all (1)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.6 What would be the reasons, if any, for such organizations to use:

a) Consultancy Services:

b) Training Services:

4.7 What would be the reasons, if any, for such organizations to not use:

a) Consultancy Services:

b) Training Services:

SECTION 5
 OPERATIONAL SITUATION

5.1 Has your organisation/company faced any problems since its existence? (please tick one)

YES NO

5.2 Has your organisation ever contracted any consultancy and/or training services? (please tick one)

YES NO (If NO, GO TO Section 6)

5.3 In contracting Consultancy Services, does your organization use: (Please tick where appropriate)

External
 Consultancy
 Services

Internal
 Resources

Combination
 of both
 External and
 Internal

Other
 (please
 specify)

5.4 In contracting Training Services, does your organization use: (Please tick where appropriate)

External
Consultancy
Services

Internal
Resources

Combination
of Both
External
and Internal

Other
(Please
specify)

5.5 Which organisation(s)/company(s) provided consultancy and/or training services?

Consultancy Organisation

Training Organisation

5.6 How often has your organisation/company participated in either consultancy and/or training services in the past?

Consultancy Services (Please tick where appropriate)

Consultancy Organisation Once Twice Three Four or more

<hr/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<hr/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<hr/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Training Services (Please tick where appropriate)

Training Organisation Once Twice Three Four or more

<hr/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<hr/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<hr/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.7 What type of consultancy and/or training services has your organisation/company contracted?

(Please tick from the following checklist)

Consultancy Services

A) Industrial Engineering Services & Production Management:

- Work method study & work measurement
- Plant/Factory layout
- Materials Handling
- Wage Incentive Schemes
- Job Evaluation/Wage Administration
- Production Planning & Control
- Feasibility Studies
- Quality Control
- Project Management
- Design of Machinery/Equipment, etc.
- Installation & Commissioning of Machinery
- Repairs & Maintenance Services
- Other (Please Specify: _____)

B) Accountancy:

- Design of Accounting/Internal Control Systems
- Preparation of Management Accounts
- External/Internal Audit
- Bookkeeping
- Cost Accounting/Effective Pricing
- Designing Systems for Stores Dept.
- Management of Investments
- Assistance in Borrowing Funds
- Other (Please Specify: _____)

C) Marketing Management:

- Market Surveys
- Promotion/Advertising/Publicity/Public Relations
- Selling Techniques/Sales Management
- Distribution Schemes
- New Product Development
- Product Rationalisation
- Pricing
- Marketing Management (Strategic Planning/Executive Control)
- Other (Please Specify: _____)

Training Services

- Production Techniques
- Management Development
- Marketing Management
- Selling Techniques
- Accounting
- Other (Please Specify: _____)

5.8 How satisfied were you with the Consultancy and/or Training Services you experienced?

(Please indicate the consultancy organisation contracted and tick where appropriate)

Consultancy Services

<input type="checkbox"/>	<input type="checkbox"/>	Organisation: _____	<input type="checkbox"/>	<input type="checkbox"/>
Very Satisfied	Somewhat Satisfied	Indifferent	Somewhat Dissatisfied	Very Dissatisfied

<input type="checkbox"/>	<input type="checkbox"/>	Organisation: _____	<input type="checkbox"/>	<input type="checkbox"/>
Very Satisfied	Somewhat Satisfied	Indifferent	Somewhat Dissatisfied	Very Dissatisfied

<input type="checkbox"/>	<input type="checkbox"/>	Organisation: _____	<input type="checkbox"/>	<input type="checkbox"/>
Very Satisfied	Somewhat Satisfied	Indifferent	Somewhat Dissatisfied	Very Dissatisfied

(Please indicate the training organisation contracted and tick where appropriate)

Training Services

<input type="checkbox"/>	<input type="checkbox"/>	Organisation: _____	<input type="checkbox"/>	<input type="checkbox"/>
Very Satisfied	Somewhat Satisfied	Indifferent	Somewhat Dissatisfied	Very Dissatisfied

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very Satisfied	Somewhat Satisfied	Indifferent	Somewhat Dissatisfied	Very Dissatisfied

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very Satisfied	Somewhat Satisfied	Indifferent	Somewhat Dissatisfied	Very Dissatisfied

5.9 If Somewhat Dissatisfied or Very Dissatisfied with either the consultancy and/or training services, what was the cause of your dissatisfaction?

Consultancy Services

Organisation: _____
Problem(s): _____

Organisation: _____
Problem(s): _____

Organisation: _____
Problem(s): _____

Training Services

Organisation: _____
Problem(s): _____

Organisation: _____
Problem(s): _____

Organisation: _____
Problem(s): _____

5.10 In contracting either consultancy and/or training services, did your organisation pay any fees?
(Please tick one)

YES NO (IF NO, GO TO 5.13)

5.11 When your organisation contracted either consultancy and/or training services, which payment arrangement was made?

(Please indicate the consultancy organisation contracted and tick where appropriate)

Consultancy Services

Organisation: _____

per day per week per project other
(Please Specify _____)

Organisation: _____

per day per week per project other
(Please Specify _____)

Organisation: _____

per day per week per project other
(Please Specify _____)

(Please indicate the training organisation contracted and tick where appropriate)

Training Services

Organisation: _____

per day per course per participant other
(Please Specify _____)

Organisation: _____

- per day
 per course
 per participant
 other
 (Please Specify _____)

Organisation: _____

- per day
 per course
 per participant
 other
 (Please Specify _____)

5.12 When making payment for either consultancy and/or training services, was the payment arrangement satisfactory?

(Please indicate the consultancy organisation contracted and tick where appropriate)

Consultancy Services

YES NO Organisation: _____

YES NO Organisation: _____

YES NO Organisation: _____

(Please indicate the training organisation contracted and tick where appropriate)

Training Services

YES NO Organisation: _____

YES NO Organisation: _____

YES NO Organisation: _____

5.13

How would you rate the level of fees charged?

(Please indicate the consultancy organisation contracted and tick where appropriate)

Consultancy Services

Very High
 Somewhat High
 Adequate

Organisation: _____
 Somewhat Low
 Very Low

Very High
 Somewhat High
 Adequate

Organisation: _____
 Somewhat Low
 Very Low

Very High
 Somewhat High
 Adequate

Organisation: _____
 Somewhat Low
 Very Low

(Please indicate the training organisation contracted and tick where appropriate)

Training Services

Very High
 Somewhat High
 Adequate

Organisation: _____
 Somewhat Low
 Very Low

Very High
 Somewhat High
 Adequate

Organisation: _____
 Somewhat Low
 Very Low

Very High
 Somewhat High
 Adequate

Organisation: _____
 Somewhat Low
 Very Low

5.14 If fees were charged for the consultancy and/or training services you contracted, would your organisation be willing to pay for such services?

YES NO (Please tick one)

5.15 If NO, why not?

5.16 If YES, please indicate the type of service contracted and the amount your organisation would be willing to pay:

Consultancy Services Contracted

Amount Willing To Pay

Training Services Contracted

Amount Willing To Pay

SECTION 6
INDUSTRIAL CONSULTANCY SERVICES (ICS UNIT)

6.1 Is your organisation familiar with the Industrial Consultancy Service (ICS) Unit? (Please tick one)

YES NO (IF NO, GO TO 6.12)

6.2 How did you come to know about ICS? (Please tick where applicable)

- Word of Mouth
- Print Media Ads
- Radio Ads
- Other (Please Specify: _____)

6.3 Did the knowledge about ICS initially interest your organisation?

YES NO (Please tick one)

Why, or Why Not? _____

6.4 Has your organisation ever contracted the ICS Unit to perform either consultancy and/or training services? (Please tick one)

YES NO (IF NO, GO TO 6.11)

6.5 Which ICS services has your organisation used? (List according to those given in 5.7 above):

Consultancy Services

Training Services

6.7 In contracting the ICS Unit for consultancy and/or training services, did your organisation pay fees to ICS Unit for the services rendered?

(Please tick one)

YES NO (IF NO, GO TO 6.9)

6.8 How would you rate the level of fees charged by the ICS Unit?

Consultancy Services

Very High Somewhat High Adequate Somewhat Low Very Low

Training Services

Very High Somewhat High Adequate Somewhat Low Very Low

6.9 How would your organisation rate the overall performance of the ICS Unit?

(5--Excellent, 4--Very Good, 3--Average, 2--Fair, 1--Poor)

(Please tick where appropriate)

Consultancy Services

5 4 3 2 1

Training services

5 4 3 2 1

6.10 What did your organisation Like or Dislike about the services performed by the ICS Unit?

Like: _____

Dislike: _____

6.11 Would your organisation be willing to use the services of the ICS Unit in the future?
(Please tick where applicable)

Consultancy Services

YES NO

If NO, please explain:

Training Services

YES NO

If NO, please explain:

6.12 Would your organisation like to be informed about ICS Unit services?

YES NO (Please tick one)

Why, or Why Not? _____

- 6.13 The Industrial Consultancy Unit (ICS) of UNIDO is capable of offering all services listed in 5.7 above. If you have not yet taken advantage of these services from ICS which services would be of most interest to your organisation?

Consultancy Services

Training Services

- 6.14 From the list of training services in 5.7, which type of training would your organization be most interested in participating? (Please tick where applicable)

<u>Training</u>	<u>Seminar/Workshop</u>	<u>Fellows hip</u>
Production Management	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Management	<input type="checkbox"/>	<input type="checkbox"/>
Selling Techniques/ Sales Management	<input type="checkbox"/>	<input type="checkbox"/>
Management Development	<input type="checkbox"/>	<input type="checkbox"/>
Accounting for Non- Accounting Managers	<input type="checkbox"/>	<input type="checkbox"/>
Understanding and Interpreting accounting systems	<input type="checkbox"/>	<input type="checkbox"/>
Participation at SMI Workshop	<input type="checkbox"/>	<input type="checkbox"/>
Other (Please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>

SECTION 7

From the following list of consultancy firms, which firms are you familiar with? (Please tick where applicable)

- Midas Consultancy Services
- Applied Business Systems
- Management Consultancy and Agencies
- Industrial Consultancy Services (ICS Unit)
- Internal Marketing and Promotion Services
- Other (Please Specify: _____)

Any general comments? _____

The information provided by completing the above questionnaire will only be used for the purposes of establishing needs for Consultancy and Training Services and will be treated confidentially and in no way be connected to your organization.

Thank you very much for your cooperation and for sparing the time and effort to answer the questions.

Please return this questionnaire to:

The Team Leader
ICS Market Survey
The Management Centre
P/Bag 303
Chichiri
Blantyre 3

APPENDIX 2

INTERVIEW SUPPLEMENT

1 Does your organization use Consultancy and/or Training Services outside Malawi?

Yes

No

2 If YES, please list the types of consultancy and/or training services and the source of funding (i.e Donor funded, Head Office funded, scholarship etc).

a) Consultancy

<u>Type of Service</u>	<u>Source of funding</u>
.....
.....
.....
.....

b) Training

<u>Type of Service</u>	<u>Source of funding</u>
.....
.....
.....
.....

3. Does your organization set aside funds specifically for consultancy and/or training services?

Yes

No

(Please tick one)

4. If so, how much approximately is budgeted per annum?

a. In-house

(i) Consulting

(ii) Training

b. External (Outside the organization)

(i) Consultancy

(ii) Training

c. Other (Please specify

(i) Consultancy

(ii) Training

5. How much would your organization be prepared to pay for the following services?

a. Consultancy

Per day

Industrial Engineering and
Production Management

Accountancy Services

Marketing Services

Other (Please specify)

.....

.....

b. Training

Per day

Production Techniques

Management Development

Marketing Principles and
Management

Selling Techniques

Accounting

Other (Please specify)

.....

.....

What would you say are your organization perception in regards to current Consultancy and/or Training Services within Malawi? (Please Explain)

.....
.....
.....
.....

7. What does your organization think about the advertising and promotion of Consultancy and/or Training Services within Malawi? (Please Explain).

.....
.....
.....
.....

8. Does your organization see any improvements that perhaps could be made in regards to the offering of Consultancy and/or Training Services within Malawi? (Please Explain)

.....
.....
.....
.....