Report of the Ad Hoc Experts Group Meeting on

“Industrialization for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps”

Harare, Zimbabwe
5–6 March 2013

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### Acronyms and abbreviations

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<tr>
<td>AEGM</td>
<td>Ad Hoc Experts Group Meeting</td>
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<td>AGOA</td>
<td>African Growth and Opportunity Act</td>
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<td>AIDA</td>
<td>Action Plan for the Accelerated Industrial Development of Africa</td>
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<td>AU-SARO</td>
<td>African Union, Southern Africa Regional Office</td>
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<td>COMESA</td>
<td>Common Market for Eastern and Southern Africa</td>
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<td>EAC</td>
<td>East African Community</td>
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<td>ECA</td>
<td>Economic Commission for Africa</td>
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<td>FDI</td>
<td>foreign direct investment</td>
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<td>GDP</td>
<td>gross domestic product</td>
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<td>GMO</td>
<td>genetically modified organism</td>
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<td>NEPAD</td>
<td>New Partnership for Africa’s Development</td>
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<td>R&amp;D</td>
<td>research and development</td>
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<td>SADC</td>
<td>Southern African Development Community</td>
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<td>SMEs</td>
<td>Small and medium-sized enterprises</td>
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<td>SRO-SA</td>
<td>Subregional Office for Southern Africa of the Economic Commission for Africa</td>
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<td>UNCTAD</td>
<td>United Nations Conference on Trade and Development</td>
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<td>UNDP</td>
<td>United Nations Development Programme</td>
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<td>UNIDO</td>
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Summary

This report is an account of the Ad Hoc Experts Group Meeting on “Industrialization for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps”, which took place in Harare from 5 to 6 March 2013. It was attended by experts from seven Southern African Development Community (SADC) States, international, regional and subregional organizations and representatives from the United Nations system.

The experts reviewed a draft report on industrialization in Southern Africa that was prepared by the Subregional Office for Southern Africa (SRO-SA), and participated in panel discussions on various industrialization issues and national reports on industrial development and strategies in the SADC member States. Presentations by the African Union, the New Partnership for Africa’s Development (NEPAD), the Development Bank of Southern Africa and the United Nations Industrial Development Organization (UNIDO) explored various critical areas in industrial development in Africa. Among the key observations were: the continent’s high dependence on primary products; low value addition to commodities before exports; high infrastructure deficit; high exposure to commodity price volatility; limited linkage of the commodities sector to the local economy; poor development in the private sector, which is highly undercapitalized; limited commitment to carry out industrial policies; limited investment in research and development (R&D), science, innovation and technology; low intra-Africa trade; and slow progress towards strengthening regional integration.

In the light of the above observations, experts recommended actions towards: revamping the policy framework and developing time-bound implementation plans; increasing investment in R&D, science and technology and innovation; increasing resources towards infrastructure development, including through public-private partnerships; developing a supportive policy framework for value addition and beneficiation of commodities; developing and implementing innovative mechanisms to finance industrial expansion, including tapping diaspora resources; and building the capacity of Governments and the private sector to tackle the challenges of global competitiveness. The experts underscored the importance of a regional approach to industrial development and urged SADC countries to domesticate the commitments of the subregional industrial policy so as to fully exploit the benefits of regional value chains.
Background

1. Farming remains the predominant economic sector for a majority of African countries, contributing to the lion's share to gross domestic product (GDP), employing the greatest proportion of the labour force, and generating a significant amount of foreign exchange earnings. In other African countries, mining, drilling and quarrying also constitute a key economic sector that generates a significant share of export revenue. The continent’s growth therefore remains largely based on semi-processed agricultural and mineral commodity exports. Yet these key sectors are characterized by low labour productivity, low integration into domestic economies, low output productivity, and generally low growth. Thus, in order to accelerate sustainable and inclusive growth and development, Africa needs to urgently add value to both agricultural and mineral export products.

2. Continental industrial development initiatives, such as NEPAD of 2001, the African Productive Capacity Initiative of 2004, and the Action Plan for the Accelerated Industrial Development of Africa (AIDA) of 2008, have been proposed as avenues to tackle the continent’s structural transformation challenges. At the subregional level, the Common Market for Eastern and Southern Africa (COMESA)–SADC–East African Community (EAC) tripartite arrangement through the three pillars of market integration, infrastructure and industrial development, seeks to consolidate the individual regional economic community trade and industrial development initiatives, and unlock the collective industrial and growth potential of the 26 member States of the three regional economic communities.

3. For Southern Africa, the SADC Industrial Development Policy Framework of 2012 provides for improving standards, technical regulations and quality infrastructure; promoting innovation, technology transfer, and R&D activities; and developing mechanisms for appropriate industrial financing. It also provides for integrating infrastructure and services into the regional industrialization strategy; supporting small and medium-sized enterprises (SMEs); and attracting local and foreign direct investment (FDI), South-South cooperation and the promotion of exports.

4. The slow pace of industrialization remains a concern in Southern Africa, and the recent launch of the SADC Industrial Development Policy is intended to provide impetus for accelerating industrial development and transformation in the subregion. In the light of this challenge, at the eighteenth Intergovernmental Committee of Experts Meeting of Southern Africa, which was held in Mauritius, in March 2012, the Economic Commission for Africa Subregional Office for Southern Africa (ECA SRO-SA) was directed to undertake a study to review industrial development in the subregion, identify the challenges and proffer attendants’ recommendations. The Ad Hoc Experts Group Meeting (AEGM) on Industrialization for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps, which was held in Harare on 5 and 6 March 2013, was organized to review the outcome of the study.
5. The AEGM was attended by experts from the following SADC member States: Botswana, Lesotho, Malawi, Namibia, Swaziland, Zambia and Zimbabwe. Experts from the African Union Commission Southern Africa Regional Office (AU-SARO), NEPAD, the Development Bank of Southern Africa, the World Bank, the Scientific and Industrial Research Development Centre, the United Nations Development Programme (UNDP, Zimbabwe), UNIDO (Zimbabwe and Vienna), the United Nations African Institute for Economic Development and Planning, and ECA also attended (see annex 1).

Opening session

(a) Opening of the meeting, election of the Bureau and adoption of the agenda

6. The opening session commenced with introductory remarks by the Director of ECA SRO-SA, Beatrice Kiraso, and the official opening statement by the Permanent Secretary of the Ministry of Economic Planning and Investment Promotion of Zimbabwe, Desire Mutize Sibanda.

7. In her remarks, Ms. Kiraso expressed thanks to the Government of Zimbabwe for hosting the meeting and the experts for accepting to participate. She highlighted the availability of ECA to provide technical assistance to member States and regional economic communities towards tackling development challenges in Africa. Ms. Kiraso observed the low levels of industrialization in Africa and reminded experts that industrialization plays a critical role in the development process, job creation and skills development, exports growth, deepening regional integration and the creation of forward and backward linkages. She further alluded to the underdeveloped and non-diversified production structures, primary commodity dependency in SADC and thus exposure to cyclical developments in commodity prices and the low intra-SADC trade, and emphasized the urgent need to confront these challenges.

8. Ms. Kiraso identified the challenges to industrialization to include: deficiencies in trans-border infrastructure development, severe constrained value addition, limited availability of energy for productive activities, limited investment in R&D and innovation, poor sustainability frameworks, poor business environment and competitiveness, and limited human resources capacity. In concluding, she urged experts to come up with clear and specific policy recommendations to stimulate local industries, and also to question the thematic and sectoral focuses of industrial policies, highlight successes and challenges, and to identify models for promoting competitive, sustainable and socially inclusive industrialization in the SADC region.

9. In his opening remarks, Mr. Sibanda welcomed the experts to Zimbabwe and expressed his Ministry’s honour in hosting the meeting. He also expressed thanks to the SADC member States for the high-level calibre of experts participating in the meeting. He alluded to the low productivity and low capital intensity of the continent’s productive sector, and further observed that the continent’s narrow export base dominated by unprocessed and semi-processed products due to limited value addition, denied Africa the benefits of linkages.
Mr. Sibanda bemoaned the low manufacturing value-added in Africa and the continued domination of a poorly mechanized farming sector. He decried the inability of Africa to pursue a resource-based industrialization strategy, but observed that the current buoyancy in the commodities markets has provided a window of opportunity to aggressively pursue such a strategy. Mr. Sibanda identified the key ingredients to industrialization to include: a policy framework; investment in R&D, science and technology; skills development and innovation, financial support and an environment that is conducive for private sector growth; access to energy and infrastructure; and the alignment of trade and industrial policies. He emphasized that a capable state was key to provide a supportive framework for industrial development.

Mr. Sibanda informed the meeting that policy development requires the full participation of all stakeholders for the necessary buy-in. He observed that the Industrial Policy of Zimbabwe, which envisions a vibrant industrial base to anchor national economic transformation, focuses on capacitating industry for enhanced value addition to mineral and non-mineral commodities. The policy seeks to translate the comparative advantage in resource endowments into a competitive industrial base, and quick-wins have been identified in farming, chemicals and minerals. Mr. Sibanda emphasized the critical role of an integrated and comprehensive industrial development policy and the importance of policy harmonization at national and subregional levels, and thus urged experts to examine the subregional industrialization strategy and related continental initiatives. He mentioned that there is scope for a SADC regional approach to manufacturing clusters, given the similarities of the economies where farming and minerals exploitation are key activities. Mr. Sibanda concluded by imploring experts to be candid in their review of the draft report and especially to ensure that the recommendations are succinct and provides member States with ammunition to tackle structural transformation.

Organizational matters

For the nineteenth Intergovernmental Committee of Experts, the meeting elected the following Bureau:

Chair: Zimbabwe
Vice-Chair: Namibia
Rapporteur: Zambia
The meeting adopted the following agenda:

- Opening of the meeting, election of the Bureau and adoption of the agenda;
- Overview and objectives of the meeting;
- Presentation of the draft report;
- Sharing experiences on subregional and continental approaches to industrialization;
- Panel discussion on four sub-themes on industrialization in Southern Africa;
- Presentation by member States - sharing of country experiences;
- Consideration and adoption of the report and recommendations of the meeting;
- Closing of the meeting.

**Account of proceedings**

(a)  *Overview and objectives of the meeting*

13. Chief of the Subregional Data Centre (SRO-SA), Sizo Mhlanga, presented an overview on industrialization in Africa re-emphasizing the continent’s commodity dependence, low value addition, limited linkages in the local economy, and the high proportion of semi-processed products in exports. He re-emphasized the critical importance of Africa tackling the constraints to industrialization such as finance, infrastructure and business development policy frameworks in order to provide a platform for transformation and for solving the continent’s developmental challenges.

14. Mr. Mhlanga reminded the experts that the overall objective of the meeting was to review and assess the status and nature of industrialization and economic transformation in Southern Africa, and to identify the constraining challenges and gaps with a view to recommending appropriate, effective and efficient remedial measures at national and subregional levels. He added that the meeting sought to specifically: review national, subregional and continental industrialization programmes and initiatives; assess the levels of industrialization and the impact of industrial development on economic transformation, growth and poverty reduction, trade, regional integration, and sustainable development; and identify key constraints to industrial development, offer concrete recommendations and propose a practical roadmap.

15. Mr. Mhlanga informed the experts that in addition to the draft report, the discussions would be enriched by panel discussions and country reports, and that recommendations of the AEGM would be submitted for consideration by the nineteenth Intergovernmental Committee of Experts of Southern Africa.
Rongai Chizema presented the draft report on Industrialization for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps. The report outlined the state of industrialization in Southern Africa and identified the key constraints and the attempts to solve them. He noted that the subregion has moved from an impressive industrialization performance to a period of deindustrialization following the structural adjustment programmes. Mr. Chizema indicated that the industrial sector was mainly based on the extractive sector and focused on few products in most countries. There is limited economic diversification with most of the economies still relying on primary exports and thus remaining vulnerable to global price volatility and declining terms of trade.

Mr. Chizema emphasized that the extractive industry and primary commodity-led economic growth was not translating into economic transformation for SADC countries. Member States should therefore create platforms that foster value addition to commodities before export so as to strengthen domestic linkages. He informed the meeting of the catalytic role of the State in fostering industrial development, and reminded experts that East Asian countries had industrialized on the back of significant government involvement in the industrial sector. Thus, Governments in Southern Africa should be mindful of this, and note that Governments can actively participate in the industrialization process. Mr. Chizema also urged member States to create an environment that is conducive to deal with the inconsistencies in policies in order to allow the private sector the necessary capacity to take the lead in industrial development.

Mr. Chizema stressed the important role that regional integration can play in promoting the necessary economies of scale, regional value chains development and cross-border linkages. He observed that an integrated Southern Africa can create the critical market capacity for industrial expansion through regional value chains.

Mr. Chizema also identified the lack of capacity to develop and carry out industrial policies as a major constraint in most member States. He urged countries to tackle capacity constraints in the Government, and to develop mechanisms and strategies to reinvigorate the weak and underdeveloped domestic private sector. He also underscored the need to put in place policy measures that are time bounded and create incentives for learning-by-doing while promoting local entrepreneurship.

Mr. Chizema highlighted the huge infrastructure gap in Southern Africa as a major constraint to industrial development and productivity. He urged the subregion to urgently examine the gaps in both hard and soft infrastructure, energy access, technology development, financing infrastructure and industry, and the necessary skills and human resources required in order to facilitate industrial transformation.

Discussions

In the ensuing discussions, experts lamented the loss of trust between the private and public sectors in the subregion and urged member States to embark on an inclusive policy development process that opens up policy space to the business community. The need to protect and support the local infant industries and SMEs was further highlighted as a key strategy to facilitate growth of indigenous business enterprises. The meeting noted the complementarity between FDI and local industries and encouraged policymakers to strengthen these linkages through appropriate policy mechanisms.
22. The experts concurred that Africa lags behind other developing regions in industrial development and that the continent’s exports are dominated by unfinished or semi-finished products. This denies the continent the opportunity to benefit fully from the exploitation of mineral and non-mineral commodities. They recognized the role that resource-based industrialization has played in Asia and other regions and agreed that the resources sector could be one feasible route towards the continent’s transformative process, and thus the need to accelerate efforts towards transformation through the implementation of industrial policies.

23. The experts recognized the key role of the State in providing infrastructure and public goods, and encouraged investment by the SADC member States to strategically embrace public-private partnerships in infrastructure provision. The critical role of infrastructure in industrialization was emphasized by experts, who equally stressed the need to tackle the technology, financial capital and human capacity challenges, and also the role of Governments in this endeavour. The key role of an active and developmentally focused State was re-emphasized.

24. The meeting also highlighted the need to adapt education, learning and research programmes to subregional industrialization needs, and to promote science, technology and innovations to strengthen value chains development. The experts urged member States to mainstream the regional integration agenda in the national industrialization process and domesticate subregional industrialization agreements. They affirmed that value chain development is a key component for subregional industrial competitiveness.

25. Member States were urged to own the industrialization process and put in place the necessary long-term framework with clear strategies to promote cost-effective, environment friendly and socially inclusive technologies using cautiously both tax and non-tax incentives. The meeting noted the strategic role of mobilizing domestic resources for industrialization and encouraged the subregion to promote capital accumulation through strengthening the saving culture and tapping on Diaspora resources.

26. The experts also observed that industrial development policies should be based on credible industrial statistics and thus urged member States to strengthen industrial research.

27. Given the lack of sufficient capital, experts urged member States to carry out gradual approaches to industrial development and to focus on upgrading industrial capacities as an initial step to forward its expansion.

28. The experts urged SRO-SA to ensure that the final version of the draft report on industrialization captures the key lessons from the experience of member States and provides pointers as to how these positive experiences could be replicated in other countries.

29. AU-SARO: Senior Planning and Programme Officer, African Union Southern Africa Regional Office, Tichawona Shumba, presented AIDA and reminded experts that the Action Plan is a multi-stakeholder strategic framework targeted at accelerating effective industrial development and sustainable economic transformation. He indicated that since 2008, the African Union has been working on supporting industrialization programmes under seven thematic clusters, including energy, infrastructure
and financing. These thematic areas are expected to increase the productive capacity of African industries, convert the continent’s comparative advantages in resources into a competitive advantage, and spread growth benefits to all citizens.

30. The vision of AIDA, he cited, is to foster sustainable economic growth and wealth creation through a dynamic manufacturing sector. Dr. Shumba shared the guiding principles of the Action Plan strategy, which encompass clear institutional arrangements and target groups for implementation. He highlighted the thematic areas of the Action Plan, which comprise of industrial development and institutional direction; upgrading production and trade capacity; promoting infrastructure and energy development together with the framework of the Programme for Infrastructure Development in Africa; industrial and technical skills for the continent’s development; industrial innovation systems, R&D, and technology development; financing and resource mobilization; and sustainable development. Dr. Shumba also discussed several supporting initiatives in industrialization, including the Julius Nyerere Scholarship programme; Science and Technology Consolidated Plan of Action; Regional Intellectual Property Rights programme; the Pan-African University Programme; and scientific awards and research grants.

Discussions

31. In the ensuing discussions, experts broached the context in which genetically modified organisms (GMOs) could be used at various levels of industrialization to benefit industrialization clusters, particularly the sustainable development and food security clusters. It was pointed out that the issue of GMOs was still under debate in the African Union as member States had no common position on the matter.

32. Other support mechanisms under the African Union rubric include the provision of research grants and expansion of support to R&D above 2 per cent of GDP, and providing opportunities for engaging African universities to participate in industrial development. Experts agreed on the critical need for a deliberate strategy by Governments to set aside resources to support specific areas of industrial innovation.

33. On the criteria for accessing the African Union support programmes, the meeting was informed that the advocacy strategy of the African Union is to work directly with regional economic communities and member States through the African Union Subregional Offices. A communication strategy for current scholarship and grants is through the African Union website. The African Union is also working on launching a science and technology observatory that will be used to monitor progress on indicators of industrialization, and share experiences and information on research.

34. The experts appreciated the role African Union plays in providing guidance through regional economic communities and emphasized the need for strengthened collaboration and policy harmonization in the roll-out of these initiatives to avoid costly duplication.

35. UNIDO: Country Director, United Nations Industrial Development Organization (Zimbabwe), Tichaona Mushayandebvu, shared background information on the Organization since its formation in 1961 as a United Nations Centre for Industrial Development. He presented the UNIDO programme in the subregion and explained that it has over 42 offices globally, including 19 Investment and Technology Promotion Offices, and 32 Cleaner Production Centres. He highlighted environment and energy, trade and capacity-building, and poverty reduction through productive activities as some
of the key thematic focus areas of UNIDO. Mr. Mushayandebvu emphasized that UNIDO provides a
global forum for generating knowledge in industrial development through advisory services, process
facilitation and capacity development.

36. While highlighting the results of a report on industrialization jointly commissioned by UNIDO
and United Nations Conference on Trade and Development (UNCTAD), Mr. Mushayandebvu identi-
fied several key challenges to industrial development, including policy failures in design and imple-
mentation during import substitution industrialization and structural adjustment policies, and povery
reduction strategy programmes. He also noted that structural constraints due to size of domestic
markets; ownership of industrial policy development process; the consequences of inward-looking
industrialization; technical capacities of domestic firms; linkages between industries, farming and
mining; lack of public-private dialogue in industrial policy development; political stability; and sus-
tainability and lack of industrial statistics, were handicaps to industrial development.

37. The experts appreciated the role of UNIDO in assisting member States to develop industrial
policies and emphasized that the policy frameworks have to be sensitive to the continent’s unique
challenges and aspirations. In addition to its instrumental role in the formulation of the AIDA strate-
gy, UNIDO continues to work with regional economic communities in carrying out industrialization
programmes and in marketing the programmes to donors.

38. NEPAD: Head of the Capacity Development Division, Office of the Chief Executive Officer,
NEPAD Planning and Coordinating Agency, Florence Nazare, outlined the NEPAD Agency’s approach
to supporting industrial development initiatives in Africa. She highlighted innovation based on ev-
edence, strengthening R&D and developing the domestic-private sector to ensure that profits are
retained in the countries to further develop the economies as some of the key strategies. Ms. Nazare
noted that public-private partnerships, provision of an enabling environment and peace and securi-
ty, are also fundamental ingredients for industrial development.

39. Other important elements in the NEPAD Agency’s overall approach to industrial development
include: value addition, expansion of the agro-industrial base, connecting Africa through information
and communications technology, and infrastructure and utilization of clean financing mechanisms.
She also shared the Agency’s views on the post-2015 (United Nations) development agenda, high-
lighting the convergence on key issues, in particular the need to expand livelihood opportunities,
including through industrialization and focusing on primary drivers of economic growth, and not
only focusing on the social sectors.

(d) Panel discussion on four sub-themes on industrialization in Southern Africa

40. Research and development, science, technology and innovation: The Executive Director
(technical), Scientific and Industrial Research and Development Centre, Leonard Madzingaidzo, in-
formed the meeting that his organization operates under the President Cabinet and is responsible for
most of the R&D in Zimbabwe. The Centre works with different Ministries and has developed com-
panies engaged in the production and commercialization of products from R&D. Mr. Madzingaidzo
highlighted R&D opportunities for value addition in Zimbabwe in the minerals and farming sectors
and noted that scientific research has played a critical role in the country’s socioeconomic develop-
ment. He also emphasized the role of science and technology in facilitating domestic linkages and
thus creating jobs and wealth. He encouraged member States to increase their spending on R&D as
a way of improving the quality of the subregion’s products and building competitiveness.
41. Mr. Madzingaidzo also emphasized that farming production systems need to be upgraded to increase productivity and hence competitiveness. He observed that Zimbabwe has put in place a favourable policy architecture, which includes: the industrial development policy, the new science and technology policy, and trade policy. On financing science, technology and innovation and R&D, he also encouraged member States to deal with the challenges of financing and to ensure that local knowledge, know-how and technologies are used to solve local challenges. To optimize the use of scarce financial resources, Mr. Madzingaidzo advocated an integrated R&D process where different government departments and the private sector work together to promote value addition in the subregion.

42. Investment and finance: Department of Economics, University of Zimbabwe, Honest Zhou, underscored the importance of adequate and affordable financial resources for industrial development and the equal importance of a supportive policy environment. He emphasized the need to target strategic economic sectors, especially those with the greatest impact, while promoting industrialization. Mr. Zhou urged member States to go beyond correcting market failures and to be investors in the manufacturing sector. He outlined the industrialization strategy in Zimbabwe, which is based on promoting farming, mining and manufacturing, and strengthening the linkages between the three sectors and the rest of the economy. He noted that the country has abandoned the import substitution strategy due to its failure to deliver results, and has learned from the success stories of the East Asian Tigers.

43. Zimbabwe has embarked on an aggressive strategy to attract FDI through the establishment of the Zimbabwe Investment Centre to harness opportunities in all sectors. Mr. Zhou observed that the country’s international attractiveness will depend on its ability to deal with its poor ranking in doing business through completing major reforms, reducing company registration fees, speeding up firm and tax registration, lowering corporate tax rates and strengthening the one-stop shop investment centre. He mentioned that financing industrial development in Zimbabwe is hampered by the low access to financial services, poor savings culture and poor domestic resources mobilization strategy, and the low confidence in the banking system. He also underscored the fact that Zimbabwe requires substantial finance to replace old plant machinery and technologies and revamp its infrastructure. To open up opportunities, the country was urged to improve the investment climate, examine policy inconsistency, foster public-private partnerships and strengthen the management of parastatals, enforce property rights, and fight corruption in support of its industrialization process.

44. The Director of Industry, Ministry of Commerce, Trade and Industry, Zambia, Tobias Mulimbika, underscored the critical role of the industrial sector for economic growth in Africa, and noted the sector’s huge requirements in terms of investment and financing. He highlighted the characteristics of financing in Africa, including: massive unfilled gaps especially for small enterprises; predominance of short-term finance and quasi-absence of cash flow-based financing; high cost of borrowing and low willingness of Banks to lend to SMEs due to lack of collateral; low expertise in management; and poor re-payment culture.

45. Mr. Mulimbika highlighted the different sources of financing infrastructure in Southern Africa and the related challenges. He urged countries to explore innovative ways of financing infrastructure and industrial development as lack of financial resources remains a constraint on the continent. Mr. Mulimbika also urged member States to focus on investment that yields long-term returns, attracts FDI and promotes public-private partnership ventures in infrastructure, harnesses domestic resources, and promotes sovereign wealth funds for industrialization. Countries were encouraged to develop comprehensive investment-friendly strategies and legal frameworks for industrialization and
economic policies that encourage savings, promote macroeconomic stability, and facilitate domestic resources mobilization.

46. Natural resources and value addition: Nancy Kgengwenyane underscored the fact that the subregional mining sector relies more on extraction and there is limited value addition onshore. She urged countries to promote economic diversification in their growth strategies and strengthen linkages between the mining sector and the other segments of the economies for an inclusive and broad-based growth. She lamented the failure of Africa to develop a diversified industry despite a long history of mineral extraction. Ms. Kgengwenyane urged member States to promote targeted education and ensure that the local mining sector is generating income and other tangible benefits for the local people, including communities in mining areas. Such a process, she pointed out, will require proper institutional settings and policies that promote beneficiation and sustainability. In addition to developing policy frameworks anchored on the Africa Mining Vision, member States should ensure that these policies are carried out.

47. Seedwell Hove, Economist, World Bank (Zimbabwe Office) delivered the presentation on behalf of the Senior Country Economist, World Bank, Nadia Piffaretti. The presentation on “mineral resources, economic linkages and industrialization” highlighted the high dependence of SADC on primary commodities and especially mining and farming products. He lamented the failure of African countries to harness the benefits offered by the economic transformation and diversification as most economies remain highly dependent on the primary commodity sector. He also highlighted the importance of economic linkages, noting that the mining sector can contribute to industrialization mainly through direct spin-offs (domestic linkages) and forward, backward and horizontal linkages, and urged countries to promote economic diversification and strengthen linkages between the mining sector and the other sectors for an inclusive and broad-based growth. He noted the great opportunities for job and wealth creation arising from the industrialization process and emphasized that value addition and linkages provide opportunities for such benefits. Mr. Hove noted that industrialization associated with diversification tends to be self-sustaining and induce fast growth dynamics, while resource dependent economies tend to be high cost countries with underdeveloped industrial sectors, and thus urged member States to aggressively pursue further processing.

48. Mr. Hove also identified challenges affecting industrialization in African countries that are endowed with natural resources, to include: increasing costs for non-resource traded sectors and dampening productivity, little attention given on backward and forward linkages with the resource sector, lack of domestic and regional infrastructure, and natural-resource rent spent in ways that promote entrenchment of resource dependence. He mentioned that the successes of Australia, Chile, Indonesia, Malaysia, Norway and Thailand illustrate the critical role of natural resources exploitation in promoting industrialization and structural transformation. He noted that mining for revenue is not optimal, rather African countries should aim for a developmental minerals sector. Mr. Hove urged member States to embark on reform of the regulatory frameworks to foster development partnerships and support industrialization. He underscored that natural resource capital needs to be used to develop human capital, infrastructure and an effective governance framework. Mr. Hove then encouraged countries to take advantage of the current wave of high demand for mineral resources to foster a new wave of industrialization.

49. Infrastructure: The Regional Advisor and Head of Training Division, the African Institute for Economic Development and Planning, Herbert Robinson, highlighted the strategic role of infrastructure in facilitating industrial development. He noted that infrastructure is a critical input in building competitiveness and a factor for connectivity, emphasizing the need to promote cost-effective in-
Mr. Robinson urged policymakers to recognize infrastructure as a key component of an integrated system for promoting industrial transformation. He also emphasized the instrumental role of the human capital in industrial and infrastructure development and urged African countries to invest in capacity development.

50. Mr. Robinson highlighted issues adversely affecting industrialization in Africa, including the failure of import substitution models, the burden of small and fragmented markets, low levels of intra-regional trade, and poor and inadequate infrastructure leading to high costs of doing business. He noted that Southern Africa is still affected by low stock and flow of infrastructure mainly due to budget and investment constraints, fast growing urbanization and population growth creating pressure on infrastructure, and weak institutions responsible for planning, investment and financing, and managing of infrastructure. He further urged member States to invest in infrastructure development and to use private-public partnership models to tackle the financial resource constraints from the government side. In conclusion, Mr. Robinson called on member States to strengthen value addition in mineral products, foster infrastructure development and target strategic sectors with greater impact while promoting industrialization; and further encouraged them to go beyond correcting market failures and be key investors in the manufacturing sector.

51. In his contribution, Chief Economist, Development Bank of Southern Africa, Simon Scott, underscored the role of infrastructure as an enabler and facilitator of development as it supports production, links markets and improves the living conditions of people. He urged member States to promote cost-effective infrastructure to development, and emphasized the need for coordination between the different government departments and other stakeholders in developing integrated strategic plans on infrastructure development. Member States should strengthen stakeholders buy-in and enhance infrastructure affordability, viability and accountability in financing. Mr. Scott highlighted that the Bank’s activities are aimed at supporting infrastructure development on a multilateral level under the framework of NEPAD. He underlined the importance of industrial development in promoting growth and urged member States to play a key role in promoting R&D, avoid bad policies affecting the industrialization process, and scale up success stories.

Discussions

52. The experts emphasized the need to promote public-private partnerships in financing infrastructure for industrialization in the subregion. They noted the instrumental role of capital, bond markets and stock exchanges in financing infrastructure and industrialization and urged the subregion to look into these as possible ways of dealing with the finance constraints. Member States were urged to use the public procurement systems to encourage local investors and promote partnerships between them and the FDIs.

53. The experts underscored the need to strengthen regional integration and infrastructure connectivity to support industrialization in the SADC region. They highlighted the need to provide infrastructure at competitive costs noting that infrastructure is an input towards a competitive industrial sector. The experts also noted that strengthening local human resources will lower the cost of providing and maintaining infrastructure.
54. Botswana: The Principal Industrial Officer, Ministry of Trade and Industry, Mpho Ntshese, presented the status of industrialization and industrial development in Botswana. She alluded to the country’s high dependence on mining, which contributes 40 per cent to GDP. She outlined the industrial development policies (IDP) of Botswana, which include the 1984 Government Paper #2 revised in 1998, and the 1998 policy under review to reflect the new conditions and priorities. Ms. Ntshese explained that apart from the small and medium-scale enterprise policy, which was developed to support industrialization, the country has several institutions established under the framework of IDP such as: the Botswana Bureau of Standards, Citizen Economic Empowerment Agency, Local Enterprise Agency, Botswana Investment and Trade Centre, Botswana Training Authority, Botswana Development Cooperation, and the National Productive Centre. Further, the country has a Financial Policy framework aimed at creating employment, spurring diversification and rural industrialization development, women empowerment, and tax incentives for the manufacturing sector.

55. Ms. Ntshese identified the country’s industrialization challenges to include: productive capacity constraints, mismatch of skills, infrastructure and energy supply gaps, R&D, and innovation systems. Regional integration challenges with the common external tariff arrangement within Southern Africa Customs Union and rules of origin in SADC, which affect the competitiveness of exports with imported raw materials, are also constraints to industrial development in Botswana.

56. Lesotho: The Deputy Director of Industry, Ministry of Trade and Industry, Cooperatives and Marketing, Moeketsi Khoboko, highlighted several experiences driving growth in the industrial sector from around 3 to 6 per cent between 2000 and 2010, and the African Growth and Opportunity Act (AGOA) as the main stimulant to the textiles and clothing subsector. He bemoaned the fact that growth in manufacturing has been confined to one sector, describing it as a mono-product growth that is exposing the country to export and institutional risks emanating from the expected expiry of the AGOA trade arrangement with the Government of the United States of America. While sectors such as mining, quarrying and farming are picking up, employment statistics indicate that the key sector is still textiles accounting for more than 50,000 jobs compared to about 1000 to 2000 jobs in the food and beverages, leather processing and other manufacturing sectors. Mr. Khoboko highlighted that the SME sector employs more than 200,000 people, and that in terms of strategy, Lesotho prioritized trade facilitation and regional cooperation, and is focusing on diversifying the economy from textiles manufacturing.

57. Malawi: The Chief Economist, Ministry of Economic Planning and Development, Jolam Banda, outlined the industrial development framework for Malawi since independence. He explained that prior to the 1979 national economic crisis, the country focused on import substitution with farming products as main exports, and from 1981 it adopted an export promotion strategy under the framework of structural adjustment. He further explained that since 1994 the policy thrust has been on trade liberalization.

58. Mr. Banda pointed out that policy environment deterioration in recent years has led to a number of challenges for the industrial sector, including lack of fuel and foreign exchange which have disrupted industrial production due to increased costs and difficulties in importing raw materials. Mr. Banda alluded to the fragile macroeconomic environment in Malawi, the difficulties in accessing finance and shortfalls in infrastructure, which are impacting on competitiveness. Further, the private sector’s lack of confidence in the State due to reported corruption is impacting negatively on the business environment. He mentioned, however, that the future looks good as the Government is to carry out an economic recovery plan together with a national export strategy to revive the economy.
59. Namibia: The National Development Advisor, National Planning Commission, Tobias Sisamu, outlined the elaborate and inclusive process involved in developing the country’s industrial policy. The industrial policy is anchored on the 2030 national vision that seeks to create a prosperous and industrialized country, developed by her human resources enjoying peace, harmony and political stability. Namibia aims, among other things, to change its production structure with manufacturing and services to account for 80 per cent of GDP, and to modernize its infrastructure in roads, railways, telecommunications and port facilities. A pro-development state is to drive the development agenda for the country with an industrialization strategy that defines the specific roles of other stakeholder. The industrial policy, which has a well articulated and targeted incentive regime that is time-bound, seeks to develop and promote SMEs as core components of the industrial ambitions and includes training and development programmes. The policy links skills development to the envisaged industrial structure and aspires to be innovation-driven with Government plans to spend 3 per cent of its GDP on innovation.

60. Mr. Sisamu mentioned that in order to ensure sustainability of the industrialization programme, the country is exploring several financing mechanisms both domestically and internationally. The Ministry of Trade and Industry has been put at the apex to drive the industrialization programme through setting policy direction while line ministries support the process. A monitoring and evaluation mechanism has also been put in place to provide independent assessment of the process.

61. Swaziland: The Principal Planning Officer, Ministry of Economic Planning and Development, Hezekiel Magagula, informed the meeting that the economy of Swaziland is largely dependent on farming. The sector employs about 80 per cent of the population and contributes about 15 per cent to GDP. Manufacturing and the services sector contribute 40 per cent and 45 per cent respectively. The 1990s, witnessed a significant drop in FDI, leading to a slowdown in industrial development and stagnant economic growth. The country’s development strategy is contained in the National Development Strategy and vision 2022, which, among other things, states that: (i) by the year 2022, Swaziland will be in the top 10 per cent of the medium human development group of countries founded on sustainable economic development, social justice and political stability; and (ii) the Swaziland Investment Promotion Authority will facilitate the FDI process for foreign and domestic investors. To promote the manufacturing sector, industrial areas have been designated throughout the country. The overall objective of promoting the industrial policy is, among others, to set the course for diversification and reinvigorated growth of the industrial sector of Swaziland, to achieve an industrial sector growth of at least 5 per cent per annum.

62. Mr. Magagula mentioned that several initiatives have been undertaken to support the industrialization of Swaziland and that the main actors in the development of industrial policy and FDI promotion are the Ministries of Commerce, Industry and Trade, Economic Planning and Development and Foreign Affairs and Trade, and the Swaziland Investment Promotion Authority. A number of institutions have been put in place by the Government to improve the performance of the manufacturing sector. Swaziland is upgrading various infrastructures across the country to support the industrialization programme, and the Government is also working closely with various stakeholders, including the private sector, to drive the industrialization process.

63. Zambia: The Principal Economist, Ministry of Finance, Maketo Mulele, presented the country’s industrialization experiences and highlighted the changing structure of the economy, with the secondary sector growing from 19.9 per cent during 1994 to 2000 to just over 30 per cent during 2007 and 2012. The primary sector is projected to remain the key sector, with mining production expected to double by 2016. Mr. Mulele also highlighted the share of metal exports by Zambia as consisting
mainly of copper accounting for more than 70 per cent of export earnings in 2012. In terms of FDI, he explained that Zambia received $5.4 billion pledges in 2012, with 20 per cent targeting the energy sector and most going to mining. He further indicated that the country’s industrial sector is growing, with imports now consisting of about 50 per cent intermediate and capital goods. These improvements are also evident in the fiscal balances as deficits have receded and revenue collection has risen to about 20 per cent of GDP.

64. Mr. Mulele indicated several constraints to industrial development, including poor health and low labour productivity, poor access to education beyond basic levels, scarcity of specialized skills, poor infrastructure services particularly energy and transport, coordination failures and limited access to affordable finance. While indicating that Zambia has institutional setups similar to that of Botswana, he highlighted that industrial development by the Government under the Sixth National Development Plan 2011-2015 is focusing on infrastructure and human capital development, and attracting investment in priority sectors using several initiatives, including the multi-facility economic zones, industrial parks, cluster developments and farm blocks.

65. Zimbabwe: The Acting Deputy Director, Ministry of Industry and Commerce, Dayford Nhema, informed experts that although Zimbabwe is considered to be one of the most industrialized countries outside South Africa in the subregion, it remains poor despite being endowed with natural resources. These resources are exploited and exported mainly in primary or semi-processed form. He noted that the manufacturing sector is diversified and well integrated with the rest of the economy. The manufacturing sector has strong linkages with farming, mining, construction and commerce, but infrastructure is poor, expensive and inadequate and thus a constraint to industrial development.

66. Mr. Nhema observed the major constraints to industrial development to include: energy and power shortages, skills deficiencies, old and obsolete machinery, uncompetitive product, financial constraints, shrinking demand for local products, and limited capacity for enhanced value addition. He also noted that Government, under its national Medium Term Plan (2011-2015), has put in place policy measures, such as the Industrial Development Policy (2012-2016) and the National Trade Policy (2012-2016), to spearhead the industrialization process. The strategy is anchored on resource mobilization for industrial development; policy on product and export diversification, natural resources management and development; infrastructure development; and human capital development, innovation, and science and technology, among other things.

Discussions

67. In the ensuing discussions, experts lamented the adverse impacts of some landlocked countries on industrial development and trade and thus emphasized the importance of regional integration to address the infrastructure and trade transit challenges. High transit and transport costs impact on the competitiveness of exports from and imports into landlocked countries. Thus, an efficient regional infrastructure is important in order to tackle some of the challenges faced by countries in the subregion. Malawi pointed out that connection through the Southern Africa power pool to the Carbora Balsa power plant in Mozambique is helping to solve the country’s electricity deficit. Further, Malawi is cooperating with Mozambique to build a rail network from Mozambique west through Malawi to Nacala, which is expected to benefit both countries by reducing transport costs. Zambia informed the meeting of concerted efforts to deal with the electricity deficit through a cost-reflecting tariff structure and the promotion of new power generation installations, including mini hydro-stations and upgrades on power generation plants. The critical role of the African Development Bank
in infrastructure development, including both regional road-rail networks and regional power pools, was recognized by the experts.

68. The experts commended the national visions and policies for industrialization and the efforts by member States to facilitate industrial growth. While observing the key role played by FDI in industrial development in East Asian countries, the experts emphasized the importance of tapping into the domestic capital markets for industrial development. Botswana, Malawi, Namibia and Zambia all emphasized that having conducive operating environments were key to attracting foreign capital into the mining sector. They also emphasized the importance of harmonized industrial policies across the subregion.

69. The experts concurred that an enabling policy environment outlining the incentives and regulations and aligning the country’s mineral policies to the African Union Mining Vision, were important for mineral sector-led industrialization. The stable policies should provide clarity on mineral beneficiation, the distribution of benefits and reinvestment of profits as articulated in the Vision. A framework that permits monitoring and evaluation of progress in policy implementation is crucial.

(f) Consideration and adoption of the report and recommendations of the meeting

70. The experts adopted the recommendations clustered into six thematic areas: (i) policy; (ii) R&D, science, technology and innovation; (iii) infrastructure; (iv) value addition and beneficiation; (v) investment and finance; and (vi) capacity-building. They recommended the adoption of the same by the nineteenth Intergovernmental Committee of Experts of Southern Africa.

(i) On policy, member States should:

• Develop clear national policies aligned to regional and continental frameworks to guide investment and industrial development.

• Domesticate the SADC Industrial Policy in order to strengthen a regional approach to industrial development.

• Develop industrial policies in consultation with all stakeholders and ensure that these policies are carried out.

(ii) On R&D, science and technology and innovation, member States should:

• Allocate adequate financial resources for science, technology and innovation and R&D.

(iii) On infrastructure, member States should:

• Accelerate and upscale infrastructure development and explore public-private partnership models for tackling this constraint.
(iv) On value addition and beneficiation, member States should:

- Develop and strengthen frameworks to promote domestic value addition, beneficiation and enhance local linkages.

(v) On investment and finance, member States should:

- Create an environment that is conducive for investment and for nurturing the private sector, and use instruments that facilitate industrial maturity and international competitiveness.
- Explore innovative ways of mobilizing both domestic and foreign financial resources to spur industrialization.

(vi) On capacity-building, member States should:

- Examine the human resource and skills capacity challenges at both government and private-sector levels.
- Reorient educational systems to build a critical entrepreneurial mass.

71. The experts recommended that member States should develop an action plan that indicates priorities, the support needed and the requisite monitoring and evaluation mechanisms that takes into consideration other ongoing initiatives on industrialization, including those of UNIDO, regional economic communities and the African Union Commission.

72. AEGM also recommended that the AU-SARO should increase its advocacy and popularization of African Union programmes and projects in Southern Africa member States.

73. The experts further recommended that the ECA SRO-SA should continue to provide technical support to member States and regional economic communities in dealing with development challenges.
Closing session

74. The closing session included statements by the Chair and the Director of SRO-SA.

75. The Chair, Charles Mujajati, expressed thanks on behalf of the Government of Zimbabwe, to the other members of the Bureau, Namibia and Zambia for helping to steer the proceedings; and to the SRO-SA for convening the meeting and bringing together a high calibre of experts and their participation in fruitful discussions and recommendations from the deliberations. Mr. Mujajati also expressed the hope that valuable insights from the AEGM would help in the transformation of Southern Africa, and his confidence that the meeting’s recommendations would be adopted by the nineteenth Meeting of the Intergovernmental Committee of Experts of Southern Africa.

76. In her closing remarks, Ms. Kiraso expressed thanks to Mr. Mujajati and his Bureau for steering the meeting, and to the Government of Zimbabwe for hosting the meeting and the enthusiasm shown towards the work of SRO-SA, as reflected by the presence of several government Ministries during the deliberations. The Director commended the experts for their input and the presenters and discussants for sharing their expertise and highlighting key issues in industrial development. In closing the AEGM, Ms. Kiraso emphasized that the development of action plans from the recommendations would go a long way towards promoting economic transformation in Southern Africa. She expressed confidence in the ability of Governments in the subregion to tackle the complex industrial development issues. Ms. Kiraso assured the availability of the experts of SRO-SA to provide a platform for dialogue on developmental challenges in the subregion.
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