



**UNITED NATIONS
ECONOMIC COMMISSION FOR AFRICA
SOUTHERN AFRICA OFFICE**

Distribution: LIMITED

ECA/SA/AEGM.Industry/2013/3
March 2013

**Report of the Ad-hoc Expert Group Meeting (AEGM) on Industrialisation 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

AEGM	Ad Hoc Expert Group Meeting
AIDA	Accelerated Industrial Development in Africa
AU	African Union
AU-SARO	African Union, Southern Africa Regional Office
COMESA	Common Market for Eastern and Southern Africa
DBSA	Development Bank of Southern Africa
EAC	East African Community
ECA SRO-SA	United Nations Economic Commission for Africa, Sub Regional Office for Southern Africa
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GMOs	Genetically Modified Organisms
IDP	Industrial Development Policy
NEPAD	New Partnership for Africa's Development
PIDA	Programme for Infrastructure Development in Africa
R&D	Research and Development
RECs	Regional Economic Communities
SADC	Southern African Development Community
SAPs	Structural Adjustment Programmes
SIPA	Swaziland Investment Promotion Agency
SMEs	Small and Medium Scale Enterprises
SIRDC	Scientific and Industrial Research Development Centre
STI	Science, Technology and Innovation
UNDP	United Nations Development Programme
UNIDEP	United Nations African Institute for Economic Development and Planning
UNIDO	United Nations Industrial Development Organisation

Summary

This report is an account of the proceedings on an Ad Hoc Experts Group Meeting on **Industrialisation for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps** organized in Harare, Zimbabwe from 5 to 6 March 2013 and attended by experts from seven SADC states, international, regional and sub regional organisations and the United Nations system. The experts reviewed a draft report on industrialization in Southern Africa prepared by SRO-SA, participated in panel discussions on various industrialization issues as well as national reports on industrial development and strategies in the SADC member States. Presentations by the African Union, NEPAD, Development Bank of Southern Africa and UNIDO explored various critical areas in industrial development in Africa.

Among the key observations on industrial development in Africa 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, poorly developed private sector which is highly undercapitalized, limited commitment to implement industrial policies, limited investment in R&D, science, innovation and technology, low intra-Africa trade and slow progress towards strengthening regional integration. In light of these 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 innovating mechanisms to finance industrial expansion including tapping on 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 sub regional industrial policy so as to fully exploit the benefits of regional value chains.

1. Background

1. Agriculture remains the predominant economic sector for a majority of African countries, contributing the lion's share to Gross Domestic Product, 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 generating a significant share of export revenues. The continent's growth therefore remains largely based on semi-processed agricultural and mineral commodity exports. Yet these key sectors are characterised by low labour productivity, low integration into domestic economies, low output productivity, and generally low growth. Thus, for accelerated 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 the New Partnership for Africa's Development (NEPAD) of 2001, the African Productive Capacity Initiative of 2004, the Plan of Action for the Accelerated Industrial Development (AIDA) of 2008 have been developed as avenues to address Africa's structural transformation. At sub regional level, the COMESA–SADC–EAC tripartite arrangement through the three pillars of market integration, infrastructure and industrial development seeks to consolidate the individual REC trade and industrial development initiatives and unlock the collective industrial and growth potential of the 26 member States of the three regional economic communities (RECs). For Southern Africa, the SADC Industrial Development Policy Framework (2012) provides for improving standards, technical regulations & quality infrastructure; promoting innovation, technology transfer, and research and development (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); attracting local and foreign direct investment (FDI), South-South cooperation and the promotion of exports.

3. The slow pace of industrialization remains a concern in Southern Africa and the recent launch of the SADC Industrial Policy is intended to provide impetus for accelerating industrial development and transformation in the sub region. In light of this challenge, the 18th Intergovernmental Committee of Experts Meeting of Southern Africa, at their meeting in Mauritius in March 2012, directed the ECA Sub Regional Office for Southern Africa (ECA SRO-SA) to undertake a study to review industrial development in the sub region, identify the challenges and proffer attendant recommendations. The Ad Hoc Experts Group Meeting (AEGM) on “Industrialisation for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps” on 5 and 6 March, 2013 in Harare, Zimbabwe was organized to review the outcome of the study.

4. Attendance

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), New Partnership for

Africa's Development (NEPAD), Development Bank of Southern Africa (DBSA), World Bank, Scientific and Industrial Research Development Centre (SIRDC); United Nations Development Programme (UNDP, Zimbabwe), the United Nations Industrial Development Organisation (UNIDO, Zimbabwe and Vienna), United Nations African Institute for Economic Development and Planning (UNIDEP), and the United Nations Economic Commission for Africa (UNECA) attended the meeting. See Annex 1: List of Experts / Participants in the AEGM.

6. Opening Session

7. The opening session was marked with introductory remarks by Director of the Economic Commission for Africa Sub Regional Office for Southern Africa, Ms. Beatrice Kiraso and the official opening statement by the Permanent Secretary in the Ministry of Economic Planning and Investment Promotion of Zimbabwe, Dr. Desire Mutize Sibanda.

8. In her remarks, Ms. Kiraso thanked the Zimbabwean government 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 addressing Africa's development challenges. The Director 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 address these challenges. Ms. Kiraso identified the challenges to industrialization to include the region's deficiencies in trans-border infrastructure development, severely 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, Ms. Kiraso urged experts to come up with clear and specific policy recommendations to stimulate local industries, and also question the thematic and sectoral focuses of industrial policies, highlight successes and challenges and identify models for promoting competitive, sustainable and socially inclusive industrialization in the SADC region.

9. The Permanent Secretary, Dr. Sibanda, in his opening remarks welcomed experts to Zimbabwe, expressed his Ministry's honour in hosting the meeting and thanked SADC member States for the high level calibre of experts participating in the meeting. Dr. Sibanda alluded to the low productivity and low capital intensity of Africa's productive sector and further observed that the continent's narrow export base dominated by un-processed and semi-processed products due to limited value-addition denied Africa the benefits of linkages. Dr. Sibanda bemoaned the low manufacturing value-added in Africa and the continued domination of a poorly mechanised agricultural sector. He decried the inability of Africa to pursue a resource-based industrialisation strategy and observed that the current buoyancy in the commodities markets provided a window of opportunity to aggressively pursue such a strategy. He identified the key ingredients to industrialisation to include: a policy framework, investment in R&D, science and technology, skills development and innovation, financial support and a conducive environment for private

sector growth, access to energy and infrastructure and the alignment of trade and industrial policies. The Permanent Secretary emphasised that a capable state was key to provide a supportive framework for industrial development.

10. Dr. Sibanda informed the meeting that policy development requires the full participation of all stakeholders for the necessary buy-in. He observed that Zimbabwe's Industrial Policy 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 agriculture, chemicals and minerals. The Permanent Secretary emphasized the critical role of an integrated and comprehensive industrial development policy for industrial development and the importance of policy harmonization at national and sub regional levels and thus urged experts to interrogate the sub regional industrialization strategy as well as related continental initiatives. He mentioned that there is scope for a SADC regional approach to manufacturing clusters, given the similarities of our economies where agriculture and minerals exploitation are key activities. Dr. 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 provide member States with ammunition to tackle structural transformation.

11. Organisational Matters

12. The experts elected Zimbabwe as Chairperson of the 19th ICE Bureau, Namibia as Vice Chairperson and Zambia as Rapporteur and adopted the following Agenda:

1. Opening of the meeting, election of bureau and adoption of work programme
2. Overview and objectives of the meeting
3. Presentation of the Report on "Industrialisation for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps"
4. Sharing experiences on sub regional and continental approaches to industrialization
5. Panel discussion on four sub-themes on industrialisation in Southern Africa
6. Sharing of country experiences
7. Consideration and adoption of the report and recommendations of the meeting
8. Closing of the Meeting

13. Account of Proceedings

(i) Overview and Objectives of the AEGM

14. Mr. Sizo Mhlanga, Chief, Sub-Regional Data Centre (SRO-SA) presented an overview on industrialization in Africa re-emphasizing the continent's commodity dependence, low value addition, limited linkages within the local economy, and the high proportion of semi processed products in exports. He re-emphasized the critical importance of Africa to address the constraints to industrialization such as finance, infrastructure and business development policy frameworks in order to provide a platform for transformation and for addressing the continent's developmental challenges. 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 identify the constraining challenges and gaps with a view to recommending appropriate, effective and efficient remedial measures at national and sub regional levels. He added that the meeting sought to specifically; review national, sub regional and continental industrialization programmes and initiatives, assess the levels of industrialisation and the impact of industrial development on economic transformation, growth and poverty reduction, trade, regional integration, and sustainable development, identify key constraints to industrial development and offer concrete recommendations and propose a practical roadmap. 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 19th Intergovernmental Committee of Experts of Southern Africa.

(ii) Presentation of the Draft Report

15. The consultant's associate, Mr. Rongai Chizema, presented the draft report on "Industrialisation for Economic Transformation and Sustainable Development in Southern Africa: Addressing the Gaps". The report outlined the state of industrialisation in Southern Africa and identified the key constraints and the attendant attempts to address them. He noted that the sub region has moved from an impressive industrialisation performance to a period of deindustrialization following the Structural Adjustment Programmes (SAPs). 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.

16. 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 which 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 and thus governments in Southern Africa have to be mindful of this. In addition to urging member States to create a conducive environment and address inconsistencies in policies to allow the private sector to take the lead in industrial development, Mr. Chizema also observed that governments can actively participate in the industrialization process.

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

18. The associate identified lack of capacity to develop and implement industrial policies as a major constraint in most member States. He urged countries to address capacity constraints within government as well as to develop mechanisms and strategies to reinvigorate the weak and

underdeveloped domestic private sector. He pointed out that a capacitated private sector is important for taking the lead in industrial development. He also underscored the need to put in place policy measures which are time bounded and create incentives for learning by doing while promoting local entrepreneurship.

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

Discussions

20. In the ensuing discussions, experts lamented the lost trust between the private and public sectors in the sub region and urged member States to embark on an inclusive policy development process which opens up policy space to the business community. The need to protect and support the local infant industries and small and medium scale enterprises (SMEs) was further highlighted as a key strategy to facilitate growth of indigenous business enterprises. The meeting noted the complementarity between foreign direct investment (FDI) and local industries and encouraged policy makers to strengthen these linkages through appropriate policy mechanisms. 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 recognised the role which resource based industrialization has played in Asia and other regions and agreed that the resources sector could be one feasible route towards Africa's transformative process and thus the need to accelerate efforts towards transformation through the implementation of industrial policies.

21. The experts recognized the key role of the State in providing infrastructure and public goods and encouraged investment by 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 address the technology, financial capital and human capacity challenges as well as the role of government in this endeavour. The key role of an active and developmentally focussed state was reemphasised.

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

23. 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 industrialisation and

encouraged the sub region to promote capital accumulation through strengthening the saving culture and tapping on Diaspora resources.

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

25. Given the lack of sufficient capital, experts urged member States to implement gradual approaches to industrial development and to focus on upgrading industrial capacities as an initial step towards industrial expansion.

26. 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.

(iii) Sharing Experiences on Sub Regional and Continental Approaches to Industrialization

27. **AU-SARO:** Dr. Tichawona Shumba, Senior Planning and Programme Officer at the African Union Sub regional Office for Southern Africa (AU-SARO) presented the Action Plan for Accelerated Industrial Development of Africa (AIDA) and reminded experts that AIDA is a multi-stakeholder strategic framework targeted at accelerating effective industrial development and sustainable economic transformation. He indicated that since 2008, the AU 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 Africa's comparative advantages in resources into competitive advantage, and spread growth benefits to all citizens. 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 AIDA strategy which encompass clear institutional arrangements and target groups for implementation. He highlighted the thematic areas of AIDA, which comprised 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 (PIDA); industrial and technical skills for Africa's development; industrial innovation systems, research and development, and technology development; financing and resource mobilization; and sustainable development. The presenter 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

28. In the ensuing discussions, experts broached the context in which genetically modified organisms (GMOs) could be used at various levels of the 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 within the AU as member States had no common position on the matter.

29. Other support mechanisms under the AU rubric include the provision of research grants and expansion of support to research and development above 2 percent 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.

30. On the criteria for accessing the AU support programmes, the meeting was informed that AU's advocacy strategy is to work directly with RECs and member States through the AU sub regional Offices. A communication strategy for current scholarship and grants is through the AU Website. The AU is also working on launching a Science and Technology Observatory which will be used to monitor progress on indicators of industrialization, sharing experiences and information on research.

31. The experts appreciated the role AU 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.

32. **UNIDO:** The UNIDO Country Director (Zimbabwe), Mr. Tichaona Mushayandebvu, presented the UNIDO program in the sub region and shared background information on the organization from its formation in 1961 as a UN Centre for Industrial Development. He explained that currently UNIDO has over 42 offices globally including 19 Investment and Technology Promotion Offices, and 32 Cleaner Production Centers. 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. The Country Director emphasized that UNIDO provides a global forum for generating knowledge in industrial development through advisory services, process facilitation and capacity development.

33. While highlighting the results of a report on industrialization jointly commissioned by UNIDO and UNCTAD, Mr. Mushayandebvu identified several key challenges to industrial development including policy failures in design and implementation during import substitution industrialization and structural adjustment policies and poverty 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 industrialisation; technical capacities of domestic firms; linkages between industries, agriculture and mining; lack of public-private dialogue in industrial policy development; political stability; sustainability and lack of industrial statistics were handicaps to industrial development.

34. The experts appreciated the role of UNIDO in assisting member States 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 strategy, UNIDO continues to work with RECs in implementing industrialization programmes and in marketing the programmes to donors.

35. **NEPAD:** Dr. Florence Nazare, the Head of the Capacity Development Division, Office of the Chief Executive Officer, NEPAD Planning and Coordinating Agency outlined NEPAD's approach to supporting industrial development initiatives in Africa. She highlighted innovation

based on evidence; strengthening research and development and developing domestic private sector to ensure that profits are retained in the countries to further develop the economies as some of the key strategies. Dr. Nazare noted that public private partnerships, provision of enabling environment, peace and security are also fundamental ingredients for industrial development. Other important elements in NEPAD's overall approach to industrial development include: value addition, expansion of the agro-industrial base, connecting Africa through ICT and infrastructure and utilization of clean financing mechanisms. She also shared the NEPAD's views on the Post-2015 development agenda, highlighting convergence on key issues, in particular, the need to expand livelihood opportunities including through industrialisation and focusing on primary drivers of economic growth, and not only focusing on the social sectors.

(iv) **Panel Discussion on Industrialization**

36. **Research and Development, science, technology and innovation (STI):** Dr. Leonard Madzingaidzo of SIRDC informed the meeting that his organization operates under the President Cabinet and is responsible for most R&D in Zimbabwe. SIRDC works with different Ministries and has developed companies engaged in production and commercialization of products from R&D. The presenter highlighted R&D opportunities for value addition in Zimbabwe in the minerals and agricultural sectors and noted that scientific research has played a critical role in the country's socioeconomic development. He emphasized the role of science and technology in promoting value addition, 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 sub region's products and building competitiveness. He also emphasized that agriculture production systems need to be upgraded to increase productivity and hence competitiveness. Dr. Madzingaidzo observed that Zimbabwe has put in place the conducive policy architecture which includes: the industrial development policy, the new science and technology policy and trade policy. On financing STI and R&D, he also encouraged member States to address challenges of financing and to ensure that local knowledge, know-how and technologies are used to solve local challenges. To optimize use of scarce financial resources, Dr. Madzingaidzo advocated an integrated R&D process where different Government departments and the private sector collaborate to promote value addition in the sub region.

37. **Investment and finance:** Dr. 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 in industrial development, especially those with greatest impact while promoting industrialization. Dr. Zhou urged member States to go beyond correcting market failures and be investors in the manufacturing sector. He outlined the industrialization strategy in Zimbabwe which is based on promoting agriculture, 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 East Asian Tigers success stories. Zimbabwe has embarked on an aggressive strategy to attract FDIs through the establishment of Zimbabwe Investment Centre to harness existing opportunities in all sectors. Dr. Zhou observed that Zimbabwe's international attractiveness will depend on its ability to address 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. The presenter underscored the fact that Zimbabwe requires substantial finance to replace old plant machinery and technologies and revamp infrastructure. To open up opportunities the country was urged to improve the investment climate, address policy inconsistency, foster Public-Private Partnerships and strengthen the management of parastatals, enforce property rights and fight corruption in support its industrialization process.

38. Mr. Tobias Mulimbika, Director of Industry, Ministry of Commerce, Trade and Industry, Zambia, 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, quasi-absence of cash flow-based financing, high cost of borrowing and low willingness of Banks to lend to the SMEs due to lack of collateral, low expertise in management and poor re-payment culture. Mr. Mulimbika highlighted 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 continent-wide. Mr. Mulimbika also urged member States to focus on investment that yields long-term returns, attract FDIs and promote Public-Private Partnership ventures in infrastructure, harness domestic resources and promote 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.

39. **Natural resources and value addition:** Ms. Nancy Kgengwenyane underscored the fact that the sub regional mining sector relies more on extraction and there is limited value addition onshore. She urged countries to promote economic diversification within 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 make sure 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 which promote beneficiation and sustainability. In addition to developing policy frameworks anchored on the Africa Mining Vision, member States should ensure that these policies are implemented.

40. Mr. Seedwell Hove, Economist, World Bank (Zimbabwe Office) delivering the Senior Country Economist, World Bank, Dr. Nadia Piffaretti's presentation on "mineral resources, economic linkages and industrialisation" highlighted SADC's high dependence on primary commodities and especially mining and agricultural 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 spinoffs (domestic linkages) - 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 industrialisation 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. He identified challenges affecting industrialization in natural resources endowed African countries including increasing costs for non-resource traded sectors and dampening productivity, little attention 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. Mr. Hove noted that the successes of Malaysia, Thailand, Chile, Indonesia, Norway and Australia 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. He 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 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.

41. Infrastructure: Professor Herbert Robinson from UNIDEP 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 infrastructure on the continent in order to reduce transit costs, for instance. He urged policy makers to recognize infrastructure as a key component of an integrated system for promoting industrial transformation. Professor Robinson also emphasized the instrumental role of the human capital in industrial and infrastructure development and urged African countries to invest in capacity development. The presenter highlighted issues adversely affecting industrialisation 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. Professor Robinson noted that the southern Africa region 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 existing infrastructure and weak institutions responsible for planning, investment/financing and managing of infrastructure. He further urged member States to invest in infrastructure development and to use private public partnerships models to address financial resources constraints from the government side. In conclusion, Professor 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.

42. In his contribution, Mr. Simon Scott, Chief Economist, Development Bank of Southern Africa underscored the role of infrastructure as an enabler and facilitator of development as it supports production, links markets and improves 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 DBSA activities aimed at supporting infrastructure development on a multilateral level within the NEPAD framework. He underlined the importance of industrial development in promoting growth and urged member States to play a key role in promoting R&D and avoid bad policies affecting industrialisation process and scale up success stories.

Discussions

43. The experts emphasized the need to promote Public-Private Partnerships in financing infrastructure for industrialization in the sub region. They noted the instrumental role of capital and bond markets and stock exchanges in financing infrastructure and industrialization and urged the sub region to look into these as possible avenues to address the finance constraint. Member States were urged to use the public procurement systems to encourage local investors and promote partnerships between them and the FDIs.

44. The experts underscored the need to strengthen regional integration and infrastructure connectivity to support industrialisation in the SADC region. They also 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.

(v) Presentations by member States

45. **Botswana:** Ms. Mpho Ntshese, Principal industrial Officer, Ministry of Trade and Industry presented the status of industrialization and industrial development in Botswana. She alluded to Botswana's high dependence on mining which currently contributes 40% 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 currently 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 within the framework of the IDP such as: the Botswana Bureau of Standards, Citizen Economic Empowerment Agency, Local Enterprise Agency, Botswana Investment and Trade Centre, the 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. She identified Botswana's industrialization challenges to include: productive capacity constraints, mismatch of skills, infrastructure and energy supply gaps, research and development and innovation systems. Regional integration challenges with the common external tariff arrangement within SACU, and rules of origin in SADC which affect competitiveness of exports with imported raw materials are also constraints to industrial development in Botswana.

46. **Lesotho:** Mr. Moeketsi Khoboko, Deputy Director of Industry, Ministry of Trade and Industry, Cooperatives and Marketing highlighted several experiences driving growth in the

industrial sector from around 3 to 6 % between 2000 and 2010, and 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 US government. While sectors such as mining, quarrying and agriculture are picking up, employment statistics indicate that the textiles sector is still key 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. He however highlighted that the SME sector employs more than 200,000 people, and that in terms of strategy, Lesotho prioritized trade facilitation, regional cooperation, and is currently focusing on diversifying the economy from textiles manufacturing.

47. **Malawi:** The Chief Economist, Ministry of Economic Planning and Development, Mr. Jolam Banda, outlined the industrial development framework for Malawi since independence. He explained that prior to the national economic crisis of 1979, the country focused on import substitution with agricultural products as main exports, while from 1981, the country adopted export promotion strategy within the framework of structural adjustment. Mr. Banda further explained that since 1994 the policy thrust has been on trade liberalization. He however 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, 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 however mentioned that the future looks good as the government is implementing an economic recovery plan together with a national export strategy to revive the economy.

48. **Namibia:** Mr. Tobias Sisamu, National Development Advisor in the National Planning Commission outlined the elaborate and inclusive process involved in developing Namibia's industrial policy. The industrial policy is anchored on the 2030 national vision which seeks to create a prosperous and industrialized Namibia, 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% of GDP and to modernize its infrastructure in roads, railways, and telecommunication 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% of its GDP on innovation.

49. 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.

50. **Swaziland:** Mr. Hezekiel Magagula, Principal Planning Officer, Ministry of Economic Planning and Development informed the meeting that Swaziland's economy is largely dependent on agriculture. The sector employs about 80% of the population and contributes about 15% to GDP. Manufacturing and the services sector contribute 40% and 45% respectively. The 1990s, witnessed a significant drop in FDIs, 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, inter alia, states that: (1) By the year 2022, the Kingdom of Swaziland will be in the top 10 percent of the medium human development group of countries founded on sustainable economic development, social justice and political stability; and (2) The Swaziland Investment Promotion Authority (SIPA) 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 other things, 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 percent per annum. He mentioned that several initiatives that 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, as well as SIPA. A number of institutions have been put in place by the Government to improve the performance of the manufacturing sector. The country is currently upgrading various infrastructures across the country to support the industrialization programme, and government is also working closely with various stakeholders including the private sector to drive the industrialization process.

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

52. 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 similar institutional setups like that of Botswana, he highlighted that industrial development by the government within the Sixth National Development Plan is focusing on infrastructure and human capital development, attracting investment in priority sectors using several initiatives including the multi-facility economic zones, industrial parks, cluster developments and farm blocks.

53. **Zimbabwe:** Mr. Dayford Nhema, Acting Deputy Director, Ministry of Industry and Commerce, informed experts that although Zimbabwe is considered to be one of the most industrialized countries outside South Africa in the sub region, 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 agriculture, mining, construction and commerce, but infrastructure is poor, expensive and inadequate and thus a constraint to industrial development. 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, i.e. 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

54. In the ensuing discussions, experts lamented the adverse impacts of the landlocked nature of some 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, efficient regional infrastructure is important in addressing some of the challenges faced by countries in the sub region. Malawi pointed out that connection through the Southern Africa power pool to the Carbora Balsa power plant in Mozambique is helping address the country's electricity deficit. Further, Malawi is cooperating with Mozambique to build a rail network from Mozambique west through Malawi to Nacala and this project is expected to benefit both countries by reducing transport costs. Zambia informed the meeting of concerted efforts to address the electricity deficit through a cost-reflecting tariff structure and the promotion of new power generation installations including mini hydro- stations and upgrades on existing 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.

55. 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. Malawi, Zambia, Botswana and Namibia all emphasized that conducive operating environments were key to attracting foreign capital into the mining sector. They also emphasized the importance of harmonized industrial policies across the sub region.

56. The experts concurred that an enabling policy environment outlining the incentives and regulations and aligning the country's mineral policies to the AU Mining Vision were important for mineral sector-led industrialization. The stable policies should provide clarity on mineral beneficiation, the distribution of benefits and re-investment of profits as articulated in the Vision. A framework which permits monitoring and evaluation of progress in policy implementation is key.

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

57. The experts adopted recommendations clustered into six thematic areas: (i) policy, (ii) R & D, science and 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 19th Intergovernmental Committee of Experts of Southern Africa.

(i) On Policy member States should:

- i. develop clear national policies aligned to regional and continental frameworks to guide investment and industrial development;
- ii. domesticate the SADC Industrial Policy in order to strengthen a regional approach to industrial development; and
- iii. develop industrial policies in consultation with all stakeholders and ensure the implementation of these policies.

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

- i. allocate adequate financial resources towards Science, Technology and Innovation (STI) and R&D.

(iii) On infrastructure, member States should:

- i. accelerate and upscale infrastructure development and explore public private partnership models for addressing this constraint.

(iv) On value addition and beneficiation, member States should:

- i. develop and/or strengthen frameworks to promote domestic value addition, beneficiation and enhancing local linkages.

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

- i. create a conducive environment for investment and for nurturing the private sector, and utilize instruments that facilitate industrial maturity and international competitiveness; and
- ii. explore innovative ways of mobilising both domestic and foreign financial resources to spur industrialisation.

(vi) On capacity building, member States should:

- i. address human resource and skills capacity challenges at both government and private sector levels, and
- ii. re-orient educational systems to build a critical entrepreneurial mass.

58. The experts recommended that member States should develop an action plan indicating priorities, the support needed and the requisite monitoring and evaluation (M&E) mechanisms taking into consideration other ongoing initiatives on industrialisation including those of UNIDO, Regional Economic Communities and the African Union Commission.

59. The AEGM also recommended that the AU-SARO should increase its advocacy and popularization of AU programmes and projects within the southern Africa region member States.

60. The experts further recommended that the ECA sub regional office for Southern Africa should continue to provide technical support to member States and RECs in addressing development challenges.

61. Closing Session

62. The closing session included statements by the Chair of the Experts Meeting and the Director of SRO-SA.

63. Mr. Charles Mujajati, the Chairperson of the Bureau, thanked the experts for fruitful discussions and recommendations from the deliberations. On behalf of the government of Zimbabwe, he thanked the other members of the Bureau, Namibia and Zambia for helping to steer the proceedings. He expressed the hope that valuable insights from the AEGM would help in Southern Africa's transformation, thanked the SRO-SA for convening the meeting and for bringing together a high caliber of experts, and further expressed confidence that meeting's recommendations would be adopted by the 19th Meeting of the Intergovernmental Committee of Experts of Southern Africa.

64. In her closing remarks Ms. Kiraso thanked Mr. Mujajati, the Chairperson of the AEGM and his bureau for steering the meeting. She thanked the Government of the Republic of Zimbabwe for hosting the meeting and for the enthusiasm they had 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 inputs 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 sub region to tackle the complex industrial development issues. Ms. Kiraso assured the experts of SRO-SA's availability to provide a platform for dialogue on developmental challenges in the sub region.

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