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IDENTIFICATION OF SUBREGIONAL AND COUNTRY PRIORITIES IN THE CONTEXT OF THE SECOND INDUSTRIAL DEVELOPMENT DECADE FOR WEST AFRICA

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PART I

INTRODUCTION

1.1. Objectives and Rationale of the Study on Subregional and Country Priorities within the Context of the Second IDDA

Following the resolution of the Conference of African Ministers of Industry (CAMI) adopted at its 10th meeting in Dakar (Senegal) in July 1991 approving the Second IDDA, the objectives and rationale of the this study on subregional and country priorities for the West African subregion are to:

(a) Make African leaders aware of the potentials of subregional economic cooperation and enable them create viable investment climate and incentives.

(b) Come-up with national and subregional priorities to be implemented during the decade (1990-2000) through pooling resources.

(c) Rationalize prioritization of national and subregional projects, and avoid duplication of projects and efforts.

(d) Assist countries in West African subregion in the implementation of their country and subregional programmes for the IDDA II.

(e) Enable Governments and subregional economic groupings in Africa to take a number of policy measures and implementation mechanisms.

(f) Recognize the major roles to be played by the private enterprises.

(g) Consolidate the existing manufacturing enterprises through rehabilitation.

In this view, Part I would briefly review the various efforts made in promoting industrial development in Africa; Part II would examine the status and problems of existing subregional and country priorities and cooperation in industrial development; Part III would review/assess the identification of national and subregional priorities in core industries; while part IV would attempt to propose some new approaches in achieving national and subregional priorities and cooperation; and Part V would give summary of conclusions and recommendations.

The report is basically a desk study supplemented by some information, views and

proposals gathered during field missions.

1.2. Genesis of Industrial Development and Subregional and Regional Cooperation in Africa from Lagos Plan of Action - LPA on ....)

Historical Retrospect

Prior to independence African leaders initiated export processing industries to increase export revenues, and diversify and expand economic production base through processing raw materials (agricultural and mineral) before export. After independence African Governments introduced import substitution policy and strategy mainly to use industrialization as a means of expanding the economic base of their countries and bringing fundamental structural changes as well as achieving a higher standard of living.

Import substitution strategy reached its limitation soon as its extension to the production of intermediate and capital goods could not be viable due to the small size of the national market vis a vis the minimum economic size of projects and incompetitiveness in export. The amount of foreign exchange required to import intermediate goods and parts grew faster than the foreign exchange available.

It was also realized that the whole socio-economic development condition of Africa were disturbing. Such situations prompted the African Heads of States and Governments to adopt the Monrovia Strategy (July 1979) - committing themselves to rapid economic and social development based on collective self-reliance and self-sustainment. This was followed by the Lagos Plan of Action and the Final Act of Lagos. The LPA - based on self-reliance and self-sustainment - is to use industrialization as an internal engine of growth by creating and developing core industries through subregional and regional cooperation.

The LPA was soon followed by the First IDDA with specific programmes at national and subregional levels with a view to formulating industrial policies and strategies, and preparing and creating core industries and supporting services.

Furthermore, African Priority Programme for Economic Recovery (APPER) (1986-1990) analyzed critically the deteriorating economic conditions of Africa, and recommended to give priority to food security (agriculture), reduce debt burdens, rehabilitate and rationalize existing industries.

Similarly IBRD - IMF advocated the Structural Adjustment Programme (SAP) - a provision of policy measures to restructure national economies, rationalization of resource allocation, liberalization of trade, prices and interest rates; reduction of deficits in the budget and balance of payments; introduction of realistic exchange rate; encouragement of private

enterprises; reform public enterprises and reduction of dirigisme.

1.3. Evolution of Africa's Industrial Development Approach. Conceptual and Implementation Issues within the Context of First IDDA

The First IDDA (1980-1990) was introduced to translate the Lagos Plan of Action into industrialization programme with the objectives of:

a. To use industrialization as a means of attaining self-reliance and self-sustainment; and as an internal engine of growth.

b. To reduce traditional dependence on forces and factors outside the continent;

c. To increase the use of domestic factor inputs;

d. To promote the establishment in Africa of core and strategic industries agro-industries, metallurgical, engineering, chemicals, and building and construction);

e. To develop critical national capabilities,

f. To promote regional and subregional cooperation.[1]

The implementation of Second IDDA, however, faced several problems of both internal and external causes. As stated in the Report on the Independent Mid-Term Evaluation of the First IDDA:[2]

(a) The formal conditions of mechanism for implementation such as incorporation of IDDA into national development plans and multinational development programmes, the mobilization of financial resources for their implementation, and the establishment and commissioning of agencies for their execution, have not been satisfactorily met.

Similarly specific recommendations like the establishment of focal points and national committees, the undertaking of feasibility studies for the core industries, and the establishment of special fund for the implementation of the recommendations were not widely adopted.

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[1]. UNECA/UNIDO. Consideration of the Draft Programme for Second IDDA Zero Draft, CAMI 10/6/ICE/1991 Vol. 1, May 22, 1991 Page 10.

[2] UNECA/UNIDO "Report on the Independent Mid-Term Evaluation of the IDDA & Proclamation of the II IDDA, "CAMI. 9/20/ICE/1989 20/ADDI 12 April 1989 Page' viii-ix.

(b) Other problems faced by First IDDA were that

(1) expectations of resource availability and cooperation were over-optimistic; (2) governments were forced to shift their focus to other more urgent national crises. (3) the overall economic declines in Africa, has been worse as was manifested by the wide spread of under-capacity utilization and chronic need for rehabilitation; (4) the poor performance has been partly attributed to managerial and entrepreneurial deficiencies; and (5) lack of adequate attention to the small scale enterprises and the informal sector,

The achievement of First IDDA has, therefore, been disappointing, and the period of 1980 - 1990 has been considered as a "lost decade" by African leaders.

The Second IDDA (1990 - 2000), like the First IDDA, reiterates its strong belief in the Lagos Plan of Action. Thus all the goals and objectives of the Second IDDA are the same as those of the First IDDA previously described. Similarly their programmes and priorities in core and strategy industries are also exactly the same. The policy strategy and implementation modality would, however, differ much as was proposed by the Independent Mid-Term Evaluation Team. Thus the Second IDDA recommendations are that programmes should:

(a) Be specific to include measurable inputs and outputs, and that have guaranteed investment protifolios;

(b) Stress on optimum use and new resource generation;

(c) Be flexible to meet the changing conditions;

(d) Be able to attract bilateral and multilateral support and

(e) Build up human, institutional and material resources capabilities including inter-country and inter-regional cooperation.

In this respect the Second IDDA's programmes appear more realistic, manageable and attainable. The programmes stress on:

(1) rehabilitation of existing enterprises; (2) maintenance and provision of spare parts; (3) agro-industrial linkages; (4) entrepreneurial development; (5) market orientation (competitiveness); (6) attraction of direct foreign investment; (7) provision of physical and institutional infrastructures; (8) development of human resources and technological capabilities; (9)development and strengthening of financial institutions and growth in subregional and regional cooperation;

Furthermore the Second IDDA programme was derived from National Programmes of Member States based on national goals, objectives, policy strategies, resources and priorities,

while the First IDDA was conceptualized and articulated centrally by the ECA, OAU and UNIDO. It is also more practically modest; and stresses on de-bottlenecking, privatization and less capital intensive technologies.

PART II

STATUS AND PROBLEMS OF EXISTING SUBREGIONAL AND COUNTRY PRIORITIES IN WEST AFRICA SINCE THE ADOPTION OF THE INITIAL INDUSTRIAL PROMOTION PROGRAMME (1983)

2.1. Overall View of the Existing Industrial Cooperation Arrangements in West African Subregion.

2.1.1. Brief Review of the Subregion

The West African subregion consists of 16 countries, namely Benin, Burkina Faso, Cape Verde, Côte d'Ivoire, the Gambia, Ghana, Guinea, Guinea Bissau, Liberia, Mali, Mauritania, the Niger, Nigeria, Senegal, Sierra Leone, and Togo. The subregion also includes five of the Sahelian countries (Burkina Faso, Mali, Mauritania, the Niger, and Senegal, three of which are land-locked countries - Burkina Faso, Mali and the Niger) as well as 12 of the 32 least developed countries in Africa (Benin, Burkina Faso, Cape Verde, the Gambia, Guinea, Guinea Bissau, Liberia, Mali, Mauritania, Niger, Sierra Leone and Togo).

The subregion comprises 20% of the area of the continent and about 33% of the population. The population of the subregion which was 141 million in 1980 grew to 191 million in 1990 and is estimated to reach 268 million in the year 2000. Its growth rate was 3.3.% during 1985-1990. About 56% (1986) of the population are in Nigeria. Of the rest only Ghana and Côte d'Ivoire have each over 10 million, five have between 5-10 million and eight less than 5 million each. The per capita income (1988) ranges from US$191 (Guinea Bissau) to US$ 1,137 (Ghana).

Thus with the exception of Nigeria and to a little extent Ghana and Côte d'Ivoire, the domestic market size and the purchasing power in of each country in the subregion are too small to justify the minimum economic sizes of core and strategic industries selected as priority during the First IDDA.

The GDP of the subregion grew by an average of -1.83% (the regional average was 0.60%) per annum during 1980-1990. Similarly the manufacturing value added (MVA) for the subregion grew at a yearly average rate of -0.14% (the regional average was 3.2%) during the same period. The share of MVA increased from 6.02% in 1983 to 11% in 1989/90 (the regional average rose from 8.28% to 11.60%). This increase was basically attributed to the fact that the rate of decline in GDP was higher than the rate of decline in the MVA - thus not due to actual increase in MVA. Generally the manufacturing sector operated at 30-40% installed capacities.

The economic structure of the subregion is still dominated by agriculture which employs 75-80 of the labour force (manufacturing employs 0.9% of the labour force only - the regional ratio is 1.8%). Manufacturing mostly consists of light industries - food and beverage industries

(30%), textiles (20%) and metal fabrication and light engineering (20%), and the rest leather, wood, chemical mixing and packing, and building materials. Many of the countries in the subregion depend on export of one or two crops (coffee, cocoa, groundnuts, palm oil, cotton, rubber and fisheries and timber) or minerals like oil (Nigeria), uranium (the Niger), iron ore (Liberia, Mauritania, Sierra Leone), bauxite (Guinea), diamond (Sierra Leone), phosphate (Senegal and Togo), etc. Although the subregion has big potentials in agricultural production and mineral deposits (oil and natural gas, iron ore, manganese, bauxite, tin, zinc, diamond, gold and phosphate), almost all of these products are exported without being processed. On the other hand, the domestic manufacturing have a high import content in terms of raw materials, intermediate inputs, capital goods, finance, technology, management know-how and entrepreneurship.

There are, therefore, structural weaknesses in the national economies in the subregion due to narrow and small economic base; and the absence of core and basic industries (metallurgical, engineering, Chemicals, agro-industries, and construction and buildings) with deeper technological production processes and operations to benefit each countries and the subregion in the development and assimilation of technology and skills; lack of production of intermediate and capital goods; no multiplier effects working within the national/subregional economies/without intra-and inter-sectoral linkages to reduce dependence on outside forces and enable the countries to make a break-through in industrialization and economic development-development take-off.

2.1.2. Subregional Organizations

The West African Subregion has over 50 economic groupings/intergovernmental organizations (IGOS) - the highest number in all the four subregions - dealing with all types of economic cooperation. List of 31 IGOS including date of their creation, total number of membership, number of membership from West Africa, and names of members are given in Annex 1. At least 14 of them deal-with industrial and energy issues. They include, among others, the Economic Community of the West African States (ECOWAS), West African Economic Community (CEAO), Mano River Union (MRU), Council of understanding, Liptako-Gourma Authority (LGA), Electricity Community of Benin (CEB- Benin and Togo), Lake Chad Basin Commission (LCBC), Niger-Nigeria Joint Commission for Cooperation (NNJCC), Organization for the Development of the Senegal River (OMVS), Organization for the Development of the Gambia River (OMVG), Niger Basin Authority, and Senegambia permanent secretariat.

As shown in Table 1, many of them operate in the same/related sectors with overlapping/duplicating activities and membership, resulting in wastage of scarce financial and manpower resources. Apart from this, "the fact that there is no over-all policy or mechanism for ensuring that their activities are harmonious and co-ordinated, prevent these organizations from re-enforcing one another or advancing the process of development and subregional

economic integration[3].

The most important of the IGOS dealing with economic integration/cooperation in West Africa are ECOWAS, CEAO and MRU.

Table 1.	Sectors in which West African IGOs have Programmes [4]
Sector	IGOs with activities in this sector
Agriculture	African Groundnut Council, OCAM, SADIAMIL, Liptako-Gourma Authority, Cocoa Producers Alliance, OCLALAV, CEBV, CEAO, ECOWAS, OICMA, CILSS, Lake Chad Basin Commission, Mano River Union, Niger-Nigeria joint Commission for Co-operation, OMVG, OMVS, Niger Basin Authority, Senegambia Permanent Secretariat, WARDA (Total = 19)
Natural Resources	OCAM, Liptako-Gourma Authority, CEAO, ECOWAS, CIEH, CILSS, Lake Chad Basin Commission, Mano River Union, Niger-Nigeria Joint Commission for Co-operation, OCLALAV, OCCGE, OICMA, OMVG, OMVS, Niger Basin Authority, Senegambia Permanent Secretariat (Total = 16)
Industry	OCAM, SADIAMIL, Council of Understanding, CEAO, ECOWAS, CEB, Lake Chad Basin Commission, Liptako-Gourma Authority, Mano River Union, Niger-Nigeria Joint Commission for Co-operation, OMVG, OMVS, Niger Basin Authority, Senegambia Permanent Secretariat (Total = 14)
Transport and Communication	ASECNA, Liptako-Gourma Authority, OCBN, CEAO, ECOWAS, Mano River Union, Lake Chad Basin Commission, Niger-Nigeria Joint Commission for Co-operation, OMVG, OMVS, Niger Basin Authority, Senegambia Permanent Secretariat. (Total = 12)
Manpower Development	CAMES, CEAO, ECOWAS, CILSS, Mano River Union, OCAM, OCCGE, WAHC, WARDA (Total = 9)
Trade Liberalization and Customs Union	CEAO, ECOWAS, Mano River Union (Total = 3)
Finance	OCAM, African Solidarity Fund, Council of Understanding, CEAO, ECOWAS, BOAD (Total = 6)
Money	BCEAO, WACH, UMOA (Total = 3)

The Economic Community of West African States (ECOWAS)

ECOWAS, comprising all the 16 countries in the subregion, was established in 1975. The main objectives of ECOWAS is to promote economic cooperation and development in all sectors of agriculture, industry, energy, transport, natural resources, commerce, monetary and financial aspects, telecommunications and social and cultural matters, to raise the standard of living of its people as well as raise and maintain economic stability, promote closer relation among its members and enhance the progress and development of the continent.

In order to attain these objectives the community is mandated to eliminate tariff and non-tariff trade barriers, establish common tariff vis-a-vis trade with non community members, enable

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3. UNECA proposals for strengthening Economic Integration in West Africa P. 21.

4 UNECA Ibid P 24-25

free movement of people, information, finance capital, goods and services among member countries, harmonize development policies, strategies and measures (fiscal and monetary), joint development and coordination on transport, communications, energy and institutional net-work.

In order to achieve cooperation in industrial development, the member States of ECOWAS should exchange information on main industrial projects as the first stage; as the second stage they should harmonize incentives on industry and industrial development plans; and as last stage they should exchange technical staff training and joint implementation of projects. ECOWAS considers all IDDA's programmes/projects of its members - agro - industries, metallurgy, engineering, chemical, wood and forestry paper and pulp, leather, fishery, building materials and packing industries - as its core priority development programme and projects.

The West African Economic Community (CEAO)

CEAO consists of six countries - Burkina Faso, Côte d'Ivoire, Mali, Mauritania, the Niger, and Senegal. It was formed in 1974 with the objective of achieving economic integration, creating a free trading zone among member states and harmonizing economic activities. It emphasizes trade and joint promotion of agricultural and industrial development, coordination of transport and communications, livestock and fishery production. To promote intra-CEAO trade in manufacturing, a regional cooperation tax (TRC) has been created to compensate less industrialized partners for loss of revenue to be paid by exporting countries. CEAO's priorities of core industries include agro-industries, fertilizers, farm implements, pumps and building materials.

The Mano River Union (MRU)

The Mano River Union, consisting of Guinea, Liberia and Sierra Leone, was established in 1973 with the objectives to intensify economic cooperation and accelerate economic development, social progress and cultural achievement; remove trade barriers to increase commerce; and create new productive capacities protected under a common tariff with a guaranteed fair distribution. The MRU makes specially efforts to establish priority union industries in pharmaceutical, pulp and paper, wood, glass works, fertilizers, food processing, animal feeds, tires and salt processing.

The existence of such a large number economic groupings/inter-governmental organizations established at the highest level covering all fields of economic activities seems to confirm the political will to cooperate. This willingness to cooperate and faith in the benefits of subregional economic integration and multinational joint ventures among member countries have also been well articulated and re-iterated by the Monrovia Declaration of Strategy and LPA in the belief of collective self-reliance - and self-sustainment.

2.1.3. Status of Subregional Project and General Problems

The subregion initially selected 35 core priority projects in metallurgical, engineering and fertilizer industries, agro-and agro-based industries and building material industries and 17 supporting projects to be implemented during First IDDA (1980-90). Later in 1985 the number of core priority projects was raised to 40 while that of supporting projects to 20. 19 of the core projects were put in the first category to be implemented in short term period, 8 projects were put in the second category to be implemented in the medium term and 13 projects in the long term.

By the end of the decade, however, nine of the 19 core projects in the first category have not made much progress, while action was suspended on two projects, that is, no action was taken on 11 projects (58%). Some had been put under national projects. Feasibility studies had been updated on two projects and one is in feasibility study stage. One project is waiting for funding. Only two projects (one rehabilitation and another new project-on a national basis) were completed.

Of the eight projects in the second category, none made any significant progress. In the case of salt and soda project, the concerned countries have tended to establish their own national projects, leaving aside the subregional programme. No substantive investment work had been done on the 13 core projects in the third category since 1985 with the exception of promotion work by the ECA up to 1988. About six projects in this category might be considered as dropped. In summary it is clear that the implementation performance of the core priority projects in the subregion during the decade is very disappointing and with poor results.

Indeed the implementation of the support projects showed better progress partly because the support projects are funded by international organizations and partly due to the efforts made by IGOS. Of 20 support projects only 6 failed to show tangible results.

The lack of progress and poor results in the implementation of priority projects in the subregion are basically attributed, among others, to unwillingness of political leaders and Governments to implement promises and commitment made at the highest levels and lack of vehicles for implementation of decision. In other words, the expressed good- wills, commitments and resolutions made at the highest levels in the Monrovia Declaration and Lagos Plan of Action have failed to materialize because they are not being pushed to the implementation level or no implementing mechanisms/agencies have been created. "There is also evidence that the lack of progress is due .....more to..... insufficient political will and inadequate vehicles for implementing decisions"[5]. "Part of the problem is due to the fact that countries accord priorities to the implementation of their national development projects and their

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[5] UNECA/UNIDO/OAU "Revised Integrated Industrial Promotion Programme for The West African Subregion" ID/WG.435/3/Rev.1 7 Feb 1986 P.9-10.

autonomous development. It seems that 30 years after political independence, African countries have not understood the validity of regional cooperation and that Governments did not necessarily feel bound by decisions made within the frame work of such cooperation"[6]. Such attitudes and inherent problems at implementation levels/stages, are also caused, inter alia, by conflict of interests and fears on imbalance of benefits, loss in employment and revenue, mistrust, lack of perception of future benefits, etc.

Apart from this, under capacity utilization of existing enterprises, the need for rehabilitation, natural calamities, political instabilities and exogenous factors, like deterioration in the terms of trade, balance of payment difficulties, debt crises, shortage of foreign exchange, IMF-IBRD structural adjustment programmes drew the attentions of Governments in the subregion to immediate national issues and problems.

The subregional institutions have neither the mandate and nor structure to implement projects. They also do not have resources, staffing and finance to undertake feasibility studies. On the other hand they depend on external technical assistance for their existence and routine activities. As explained under 2.1.2 above, there was little coordination among subregional projects. The subregional intergovernmental organizations have not also been effective in catalyzing subregional cooperation and development as was intended because they have overlapping/duplicating functions and activities; and part of their problems are attributed to the complexity in coordinating and implementing complementarities and decisions among 16 countries in the subregion.

There have also been failure of attendance of important meetings by Member States to discuss and appraise studies on subregional projects unless attendance at the meetings is funded fully by the sponsoring IGOS. But the sponsoring IGOS could not have adequate funds for such purposes, nor the donor agencies are willing to pay for official trips. As a result many CEAO project studies have remained on the shelves without being examined/commented on let alone being promoted.

There is also lack of communications/appropriate dialogue between subregional institutions/IGOS and member countries and clear and timely responses. Generally consultations are limited to between Ministries and IGOS without involving operating enterprises /implementation agencies. Similarly, problems of communication and coordination also exist among Government Ministries and implementing agencies in individual countries, as there is no definition of functions, responsibilities, accountabilities and delegation. That is, the modus operandi at the national level has not been well defined before conceiving subregional cooperation. In the absence of such clear mechanisms of consultations and coordinations the

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[6] ECA/MULPOC "Report to the Council of Ministers of the Niamey Based MULPOC on the Mechanisms for Enhancing Industrial Integration and cooperation within the subregion" ECA/MULPOC/NIA/90/XII/17 ECA/IHSD/POL/010/90 Dec. 1990 P.25.

required project activities and adequate preliminary arrangements like feasibility studies, financing arrangements, engineering specification, mineral survey, location and supply of inputs, training labour, marketing studies, etc. are not well attended on time.

2.2. Other Specific Constraints to the Implementation of Subregional Industrial Cooperation Programmes and Projects

2.2.1. Problems Associated with the Choice and Implementation of Subregional and Country Priorities

As already explained under subsection 2.1.1. above, most of the manufacturing enterprises in subregion consists of light industries. These enterprises have been duplicated in almost all the countries in the subregion as they have been designed to supply domestic markets which are limited in size, and in purchasing power (Nigeria could be exception). Thus, they have no such larger capacities to export to the subregion in terms of production, standards and quality of products, marketing organizations and competitiveness in prices.

The other problem is the subregional core priority projects were not well prepared before submission as they were "submitted on the spur of moment with little consideration given to implications and problems of implementation. As a result, many of the projects lacked the necessary data or supporting studies. The selection and location of projects were governed by subjective consideration other than economic. .....political considerations and the desire to accommodate the wishes of all member countries seemed take precedence over the selection criteria. The commission identified certain major short-comings in the programme, viz, inadequacy of the project definition and selection criteria, lack of basic data in respect of projects, inadequacy of distribution of projects among Member States"[7]

The host countries, after successfully passing their subregional projects through the selection commission, have not made the required efforts to promote the projects in terms of carrying out the feasibility studies, looking for partners, finance and organizing implementing mechanism on time. On the other hand, they have wrongly assumed that, as it appears, the subregional projects would bring extra fund over and above what these countries could raise through bilateral and multilateral sources and the subregional and regional institutions would be responsible for raising the fund, promoting and implementing the projects.

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[7] UNECA/UNIDO/OAU "Revised Integrated Industrial promotion programme for West African Subregion" ID/WG.455/3/Rev/Ibid P. 16 and 17.

2.2.2. Problems and Constraints in the Production and Supply of Raw Materials, Intermediate Inputs, Equipment, Tools, Parts and Implements

One of the major problems and constraints associated with the production and supply of raw materials, intermediate inputs and capital goods are basically relate to:

a. the structural weaknesses of the economies of the countries in the subregion. The structural weaknesses are mostly attributed to:

(1) Lack of inter-and intra-sectoral linkages and complementarities;

(2) Low industrial base;

(3) Concentration on easy import-substitution industries with high import contents;

(4) Absence of integrated basic metallurgical, engineering and chemical industries; with deeper/sophisticated technological processes;

(5) Inadequate agricultural production base and diversification;

(6) Weakness in physical and institutional infrastructure,

(7) Inadequate, inefficient and ineffective industrial plans, policies and strategies;

(8) Lack of innovation and motivation for identifying the uses of local raw materials and intermediate goods/by products. e.g. molasses, husks, kernels pomis, alum (by a products in fertilizer production) for water treatment, etc, are wasted;

(9) Lack of sensitization of the market through effective promotional activities for import substitution using TV, news papers, posters and product differentiation to capture and manipulate the imagination and taste of the consumers like importers. That is, local goods are not well advertised;

(10) Lack of forced circumstances to develop the use of local materials e.g. the case of China and India;

b. The other main problems and constraints are:

(1) lack of adequate/incompleteness in mineral survey/resource inventory for ready exploitation and development; e.g. iron ores, manganese, phosphate, power, oil and natural gas, fishery and forestry.

(2) Lack of exchange of information among countries of the subregion on availability of the required raw materials, intermediate inputs, equipment, tools, parts and subregional markets/demand. e.g. cotton fabrics, mineral water, iron ore, fertilizers, processed wood products, etc.

(3) Foreign owned enterprises in the subregion usually prefer to export to or import from Europe/Japan rather than to/from the neighbouring countries due to historical/ownership ties, perhaps for transferring prices and at non-arms length deals. The cases of clinker supply from CIMAO and fertilizer supply from ICS are some of the examples. The subregional markets for certain products like cement and clinker are controlled by monopolists/oligopolist.

(4) Government interference in sanctioning of export/import destination/sources to/from subregional markets/sources is not applied even if equity ownership in the plant and mandatory agreements do exist. The refusal/reluctance to purchase phosphate fertilizer from the Industries Chimiques du Senegal (ICS) by Cameroon, Côte d'Ivoire and Nigeria is a bad example.

(5) Quality, prices, terms and conditions of delivery have been often considered less acceptable and competitive than those to/from Europe and Japan. These issues have been some of the major factors why the clinker from CIMAO, and sugar from SSS could not be marketed in the subregion.

(6) Transport and communication facilities have been considered much easier and more reliable to/from Europe and Japan than from within the subregion.

(7) Again, lack of involvement by private enterprises from the beginning and or their failure to recognize the benefits of it coupled with the inefficiency and structural weaknesses of public enterprises. (See also sub section 2.2.4.3.)

2.2.3. Problems and Constraints in Development of Manpower and Technological Capabilities

The shortage of trained industrial man-power and lack of entrepreneurs, managerial and technical capabilities, including of repair and maintenance, invariably prevail in all the countries in the subregion. Even those with higher university degrees and relevant academic qualifications lack adequate experience, operational skills and practical technical capabilities in planning, analyzing, and operating priority projects at the national and subregional levels. A few of those who have been exposed to long experience and relevant skills are not fully utilized/placed well and as a result, they aspire to emigrate abroad, thus leading to a "brain drain".

Thus, most of the work for project cycle from identification and feasibility study, engineering design and specifications, tender preparation and selection, contract negotiation, up

to plant commission is handled by foreign firms/consultants/with expatriate advisors. Even if there are capable and well organized subregional firms/consultants the key personnel/specialists in core strategic industries are brought temporarily from abroad. These foreign consultants/advisors would not, however, quickly understand and properly diagnose the local and subregional socio-economic conditions, and the need for inter-and intra sectoral and subregional linkages and priorities. They usually make their conclusions, recommendations and design on what they already know in their own countries.

There is also lack/weaknesses in arranging advance training of nationals during acquisition and installation of plants, as well as their involvement at planning, designing, installation and commission stages. On the-job and in-service training are not widely practised while the Japanese approach of "teaching company" is rare. More care for the delicacy of machines and equipment is stressed than for nationals to acquire capabilities to operate the machines and equipment.

Furthermore, there is a high turn-over of skilled personnel due to low pay, lack of fair treatment, nepotism and low morale, (particularly in the public enterprises). Thus, skilled and experienced engineers join administrative and marketing activities usually with TNCS engaged in export-import businesses.

Talented entrepreneurs usually being found in small scale enterprises/factories and the informal sector are discouraged by government policy measures towards nationals. Such discouragement include harassment by all sorts of taxes, dues, fees, rates, permits and licenses, as well as delay in issuing land/premises, inability to get bank credits, and lack of extension to give them training in bookkeeping, marketing, purchasing inputs and stocking, etc.

There is also lack of practical link between the need of industries for skills and the curriculum in the higher education. All such problems together with the absence/weakness in R and D to allow nationals to adopt and assimilate imported technology are major impediments to make a breakthrough in managerial and technological capabilities.

2.2.4. Problems and Constraints in the Development of Physical and Institutional Infrastructure and Services

2.2.4.1. Physical Infrastructure

There are shortages and critical bottlenecks in road transport, railways, port facilities, storage and ware houses, communications, power and water supplies both at the national and subregional levels. Most of existing transport facilities like roads and railways have been built to connect the mining and plantation enclaves and/or major urban centres/capital cities to ports for export-import. Thus there are shortages of secondary and feeder roads to connect the major

urban commercial and industrial centres to the rural hinterland to collect agricultural products and distribute manufactured goods. Similarly all neighbouring countries having long borders are not well connected by all weather roads. Probably there is only one or two crossing points with all weather roads through out the long border lines.

Shortages and bottlenecks in power supplies have been critical forcing enterprises work under capacities or build their own expensive thermal power plants and water wells including the stand-bys. The shortage in the commercial warehouses have also forced additional investments on manufacturing, while bottlenecks at port facilities have caused delays and inconvenience in export and import, and particularly the absence of coastal shipping hinders trade within the subregion.

Communications (telephones, telexes, faxes, and postal services) and air transport services both within individual countries and subregion are not easy and regular (on a daily basis). The services are very expensive and connection might be through Europe. Bottlenecks in the existing infrastructure are common due to lack/delays in repair and maintenance usually attributed to lack of foreign exchange to import spare parts and components. Thus most of the physical infrastructure work under capacities; and when they operate they are forced to work over capacities again forcing delays in maintenance and repairs and thus accelerating their wear and tears.

2.2.4.2. Public Institutions

Problems and constraints in institutional infrastructure include weak organizational set-up; weak/lack of proper definition of functions, responsibilities, accountabilities, authorities/autonomies/ delegation to board/management of public enterprises in planning purchase, production, distribution and expansion; pressures, nepotism and political consideration in selection, appointment and promotion of managers and senior officials of the institution; under pricing of products, power, water and transport tariffs and rates and other service changes, fees and levies rendered by public enterprises usually as social functions/subsidies to the consumers; inadequate depreciation allowance/ reserves; large subsidies to parastatals to cover their cash deficits for loan and interest payments, repair and maintenance, replacement and expansion, and even to cover regular expenses like salaries; and the delays in disbursement of the Government budget. Furthermore, public institutions invariably face like private manufacturing sector, shortage of skills, and experienced manpower. Indeed the level of inefficiency in management is worse than in the Private Sector. (please see also sub sections 3.1.1. and 3.1.2.)

2.2.4.3. Private enterprises

Generally the role of private sector in manufacturing, particularly in the small scale enterprises and informal sector is very much neglected. The private sector is not closely

involved/regularly consulted in the setting-up of industrial goals, objectives, strategies and policy measures as well as in subregional cooperation and agreements. National objectives, policies, strategies and policy measures are usually kept away as secret from the private sector until they are officially announced. This might also apply even in the case where the Government policy measures involve investment incentives like tax holidays and concessions to private enterprises. Similarly the private sector is not being involved on a priori basis on subregional negotiation and agreement. Sometimes they might come to know about the agreement on the mass media, without further detailed briefings through meetings/seminars regarding the role they should play, the benefits to be derived from such-subregional cooperation, the assistance and incentives they would be provided for their participation, and their comments and views if there are needs for improvements in the agreements and creation of implementation mechanism and follow-up. Thus they tend to be reluctant/suspicious to the agreement/cooperative project without understanding the its benefits.

There is lack of constitutional protection/guarantees against expropriation/confiscation of properties/industries. Industrialists are usually building monuments to be left as heritages bearing their names to their grand children like Lockfeller, Ford, Vanderbilt, etc. But a frequent nationalization and confiscations of industries with every change in Governments in Africa have discouraged such monumental dreams and ventures. Instead both foreign and indigenous entrepreneurs have tended to invest in liquid assets and foreign exchanges abroad.

Similarly the involvement of direct foreign private investors also are neglected. The participation of foreign private investors, if any, is usually much limited to carrying out the feasibility studies, supplying the equipment and machinery, contracting the construction, supervision and management without involving risks on their capital investment. Thus most of the time their fees/gains are front - ended so that they go out without any responsibility and losses if something goes wrong any time. The case of CIMAO a cement plant in Togo, and The Société Sucrière de Savé (SSS-Benin) are good examples.

2.2.5. Financing Problems

The problems of finance in the manufacturing sector is very widespread both at the national and subregional levels, particularly the shortage of foreign exchange is critical. The shortages of finance are mainly attributed to

a. The declining export earning due to the fall of prices of primary export commodities,

b. rising prices of (manufactured) imports,

c. low rate of return in the private manufacturing sector,

d. prevailing loss and absence of adequate depreciation reserves in the public enterprises,

e. low/negative interest rates discouraging saving

f. high rate of inflation encouraging speculation in land, buildings and commodity hoarding,

g. fear of instabilities (economic, political and currencies) leading capital flights,

h. deficits both in Government budgets and balance of payments,

i. high mounting debt burdens and external loan servicing,

j. decline in the direct foreign private capital inflows,

k. decline/inadequacy in bilateral and multilateral official aid and loans.

l. decline in the commercial external loans/suppliers credits due the mounting debt in the subregion,

m. absence of domestic/subregion capital markets.

PART III

IDENTIFICATION OF SUBREGIONAL AND COUNTRY PRIORITIES WITHIN THE CONTEXT OF THE DECADE

3.1. Programmes of Consolidation

Programmes of consolidation involves rehabilitation (including repairs and maintenance) of existing public and private industrial enterprises; and revitalization of public enterprises. Rehabilitation and revitalization have been given top priority both by the Mid-Term Evaluation Team of First IDDA and all the National Programmes prepared for the Second IDDA by the 16 countries in the subregion. Such increase would change the losing enterprises into profitable concerns. Furthermore rehabilitation and revitalization would induce improvement in all the managerial and technical effectiveness and efficiency of existing enterprises.

Rehabilitation and revitalization would be cheaper than constructing new similar industries because investment requirements for rehabilitation and revitalization is marginal as there are already basic machinery, equipment, installations, physical infrastructures and organizational set-up including staffing. It would also avoid of creating bad political and psychological impressions/images of establishing new industries while existing ones are badly run/abandoned.

The rehabilitation and revitalization priority basically also lies in the big potentials of increasing production in national industrial outputs in the subregion through bringing to fuller capacity utilization of existing plants and factories which presently operate on the average at 30-40% of their installed capacities. For instance, increasing the average capacity utilization to 70% alone would double the industrial outputs in one shift. Assuming other things are equal, this would double manufacturing value added (MVA), and employment (wages and salaries), profits savings and government revenues in the industrial sector. In many industries it would be even be possible to triple the output by introducing second and third shifts if provisions of spare parts, power, water and other inputs are assured.

At the moment there are critical shortages of consumers goods (food, textiles, leather, building and construction materials, chemicals and pharmaceutical products, and durable and non-durable household items) which are being imported using scarce foreign exchange, while domestic industries with the potentials of producing the same/similar products are working under capacities or even remain closed. For example, the iron and steel plants in the subregion operate at 10-25% of their installed capacities while iron and steel products are being imported from Brazil and the Far East to satisfy the subregional market. Similarly large quantities of cement, clinker, sugar and fertilizers are being imported while the West African Cement Plant (CIMAO) and Save Sugar Company (SSS) remain closed, and the fertilizer plant in Senegal (ICS) and the cement plant in Benin face financial and market crises. Such increase in the national/subregional production of industrial outputs through rehabilitation and revitalization would, therefore, increase foreign exchange earnings through saving in import-substitution and/or export earning

by exporting industrial goods to the subregion/outside the subregion. Furthermore, the increase in production would expand subregional trade and promote economic cooperation and interdependence within the subregion, and thus reduce dependence on outside the subregion/region.

The increase in industrial production would also increase the development and production of abundant national/subregional natural resources as raw materials and/intermediate inputs. For instance, the rehabilitation of Save Sugar Co. in Benin and Sugar industries in Côte d' Ivoire would increase sugar cane cultivation, sugar refineries, confectionery industries and thus reduce sugar imports to the subregion, the rehabilitation of CIMAO and SCO (Cement Company of Onigbolo) would enable the subregion to develop local clinker and reduce dependence on imported clinker; Similarly the rehabilitation and revitalization of food, textile and leather industries would save the subregion large amounts of foreign exchanges and reduce their dependence on imports of such light consumers' goods as well as enable them develop their own abundant raw materials and intermediate inputs.

Such expansion in industrial outputs through rehabilitation and revitalization, would inevitably have further impacts on the overall national economies in the subregion by further expanding the other sectors like agriculture, transport, energy, trade and services. For instance, the increase in industrial outputs would create more demand for agricultural raw materials (cereals, fruits and vegetables, oil seeds, hides and skins, wood and lumber, fisheries, cotton, etc to be processed), and at the same time would create further demand for industrial outputs (processed food; clothing, fertilizers, farm implements, tools, pesticides, clothing, shoes, etc) resulting in further increases in GDP, employment, savings and investments and probably subregional trade and cooperation.

3.1.1. Rehabilitation and Maintenance

The low capacity utilization, low productivity, sub optimality in input-output ratios, and sub standards in consumption co-efficient of existing plants were reported by the Mid-Term Evaluation Team and confirmed by the National Programmes for the Second IDDA. The main causes of these problems include, among others, (already well elaborated under part II)

(1) Wrong investment decisions made usually without proper feasibility studies, poor project designs and plant layouts, wrong/unworkable technologies to local circumstances or obsolete equipment/prototype machines without spare parts through suppliers' credits;

(2) high down times by machine breaks;

(3) power cuts/shortages;

(4) lack of repair and maintenance

(5) shortage of raw materials and intermediate inputs;

(6) market constraints (small domestic markets and in-competitiveness in quality, prices and terms of delivery in the export markets);

(7) labour conflicts;

(8) shortages of skills and management deficiencies in planning purchase, production and marketing and control over budgets, costs and inventories;

(9) shortage of finance;

(10) shortage of foreign exchange to import spare parts, raw materials and intermediate inputs;

(11) lack of inter-and intra-sectoral linkages; and

(12) wrong macro-economic policies (pricing products, subsidies, interest rates, taxation, etc.).

3.1.1.1. Identification and Assessment of National Priority Programmes/Projects for Rehabilitation

Almost the 16 countries in the subregion have already identified/listed their priority projects for rehabilitation in each of their National Programmes See Annex 2 prepared for the Second IDDA, and it would thus be unnecessary to repeat them here. A brief assessment would, however, be made regarding their impacts/roles and complimentarities in the subregional cooperation.

Most of the countries have prioritized rehabilitation of agro-industries like fruits and vegetable processing, cereal processing and bakeries and oil mills, (Senegal, Mali, Côte d' Ivoire, Liberia, Guinea, Niger, Nigeria, Sierra Leone, Togo, the Gambia and Benin) and textiles and leather industries (Mali, Senegal, Côte d' Ivoire, Niger, Nigeria, Ghana, Benin, Togo, and Burkina Faso,). This might appear duplication of efforts. On the other hand, there are still sufficient demand for the products of these industries in the subregion, presently being imported both at national and subregional levels. If the products are competitive in prices and qualities increase in these products will enhance subregional trades. The other advantages to be derived from these similarities are joint marketing and promotion efforts through product differentiation, specialization and division of labour and joint production of spare parts and components for their plants, joint efforts in transferring, adapting and assimilating of technologies, joint training

facilities, and joint designs and research.

The other national priorities are the rehabilitation of fishery industries and fishery equipment (Senegal, Ghana, Cape Verde, Mauritania, Guinea Bisau, Guinea, Togo, Sierra Leone, and Nigeria). The production, processing and marketing fishery products as well as repair and maintenance of equipment and boats could create subregional cooperation. Similarly, the production of forestry products (Côte d' Ivoire, Ghana, Liberia, Sierra Leone, Guinea and Nigeria) could bring cooperation in specialization, division of labour and joint marketing and joint design of furniture industries for export markets outside subregion. Other national priorities identified for rehabilitation are enterprises producing farm implements, tools and equipment, spare parts and components and foundries (Ghana, Côte d' Ivoire, Guinea, Mali, Burkina Faso, the Gambia, Nigeria, Senegal and Liberia). As all the intermediate inputs for these industries are being imported and their rehabilitation and expansion would create sustainable demand for the establishment of an integrated large scale steel mills including production of metallic alloys, on a subregional/regional basis and thus increase subregional cooperation and reduce dependence on imports.

Other national rehabilitation projects having subregional complimentarities are rehabilitation of manganese mines in Ghana; rehabilitation of glass factory in Liberia to supply members of the MRU, oil refinery in Sierra Leone, pharmaceutical in Ghana, Burkina Faso, Niger, Senegal, Liberia and Sirea Leone, Guinea.

National Rehabilitation projects having impacts on subregional trades and cooperation include sugar (Benin and Côte d' Ivoire), leather (Niger, Mali and Burkina Faso), meat (Niger, Mali, Burkina Faso). The other priority area invariably emphasized in all the National Programmes is rehabilitation and revitalization of industries which could improve and strengthen the linkage between agriculture and industry. This is in view of the fact that agriculture could use industrial products as inputs (fertilizers, pesticides, farm implements, tools and equipment); and supply inputs to industry (oil seeds, grains for milling, cotton fibre, hides and skins, lumber, fishery, fruits and vegetables); foreign exchange earning from export of agricultural products; and markets for consumers manufactured goods. Such improvement and strengthening the linkages between agriculture and industry would have positive impacts on stimulating internal engines of growth both at national and subregional level.

3.1.1.2. Identification and Assessment of Subregional Priority Projects for Rehabilitation

The subregional projects requiring immediate rehabilitation are (1) CIMAO clinker plant in Togo; (2) ICS fertilizer plant in Senegal, (3) SSS integrated Sugar Mill in Benin, (4) Onigbolo clinker/cement plant in Benin and (5) VRA-Volta hydro-electric power generating plant in Ghana. (1) CIMAO - Ciments de l'Afrique de l'ouest Company was initially established in 1968; and commenced production in 1980 with a total investment cost of US $316.7 million as a joint venture between Togo, Côte d'Ivoire and Ghana with an annual production capacity of

1.2 million tons of clinker to be marketed to the cement grinding mills in the three countries. The plant built in Tablighbo 70 kms from Lome has a railway connection to ports, port storage and loading facilities; operator's village, power and water lines with possibility to expand to 1.8 million tons capacity per year. The plant stopped operation, however, in 1987 due to, among others, lack of competitiveness in the price of clinker, weak management, absence of owner operator, poor marketing strategy, weak international demand for cement and decline in the demand in the member countries. CIMAO is the first of its kind both as multinational industrial corporation and clinker plant in the West African subregion. It thus requires rehabilitation to remove the existing retribution, mistrust and recrimination; and make use of the existing investment facilities rather building a new one. The demand for clinker for the three Member States has now exceeded the capacity of CIMAO (1.2 mtpy). The subregional demand for clinker has been more than 10 times that of CIMAO.

ICS-Industries Chimiques du Sénégal was established in 1980 in Senegal with a total investment of FCFA 21.3 billion - a joint venture between Senegal, Nigeria, Cameroon, Côte d' Ivoire and India with production capacities of 627,000 tons of sulfuric acid, 476,000 tons of phosphoric acid and 250,000 of phosphate fertilizers to be marketed in the subscribers' countries. These nominal capacities were later reduced to 337,000 tpy phosphoric acid and 120,000 tpy fertilizers. The fertilizer plant is still working under capacity and has been in financial crisis due to shortage of markets, high production costs, and international depression of fertilizers. It has recently carried out technical rehabilitation and the financial restructuring is under way.

(3) SSS-Societé Sucriere de Save is an integrated sugar cane refinery in Benin established as a joint venture between Benin and Nigeria in 1980 with a total investment of US$ 248 million with an annual production capacity of 40,000 tons of refined sugar. The plant was closed due to weakness in management, high cost of production, incompetitivenes in prices, lack of finance, other technical problems, etc. It is being offered for privatization. The Nigerian import of sugar alone amounts to about 1 million tons per year.

(4) SCO-Société Ciments Onigbolo clinker and cement plant in Benin was established as a joint venture between Benin and Nigeria in 1979 with an annual production capacity of 500,000 tpy of clinker and cement. The plant was operating at below 30% of its capacity. The company faced high production cost and selling cement at much lower prices than production cost due to international competition. Presently Benin imports most of its clinker requirements while this plant operates under capacity. Similarly Nigeria also imports over 1 million tons of clinker and cements.

(5) VRA and expansion of Volta Hydro - electric Power. The plant, located in Ghana is supplying electricity to Ghana, Togo, Côte d' Ivoire and Benin with the possibility to extend to Burkina Fasso. The project including refitting and modernizing the Akosombo generating plant, construction of 161 KV grid to upper western Ghana and connection to Burkina Faso requires a total cost of Cedis 457,302 million during (1990-1994). There are critical shortages

of power in the subregion; and the power rates are high outside Ghana due to the taxation on power.

3.1.1.3. Rehabilitation Measures

The first action required for rehabilitation is to make diagnostic studies for ailing industrial enterprises for each plant in each country as each plant may need specific remedial measures. Some countries have already carried out such diagnostic studies and analyses for rehabilitation. From these studies and analyze the required remedial measures would be generalized as follows:

(1) To carry out thorough repairs and maintenance the plants; (2) provision of spare parts and replacement of old and obsolete components, equipment and machines; (3) provision of the required raw materials and intermediate inputs; (4) improve availability of foreign exchange for importation of inputs and parts; (5) eliminate power cuts; (6) improve productivity of labour including managerial and technological capabilities through intensive training of workers as well as middle and senior managerial and technical personnel in production, management, budgeting, accounting, marketing, cost and quality controls, personnel management, and maintenance; (7) introduce preventive maintenance and to this effect enterprises should be required to produce maintenance plans/programmes whenever they ask loans, tax concessions, foreign exchange permits, etc. There should also be well organized publicity campaign, and awarding systems for rehabilitation, repair and maintenance and training achievements including tax credits for training. (8) improve marketing strategies (competitiveness; reduce monopolistic approach and reliance on protection, particularly regarding prices and quality); (9) provision of finance; (10) improve subregional economic cooperation to enable those oversized enterprises in smaller sized national markets operate at full capacities through export; (11) improve inter-and intra-sectoral linkages, particularly the linkage between agriculture and industry, rehabilitation should also include all the macro-economic aspects, - restructuring the macro-economic policy measures like rationalizing prices, wages, interest rate, foreign exchange rates, taxation and removal of subsidies/ cross-subsidies through underpricing power, water and transport rates, charges, tariffs and dues. Rehabilitation, therefore, should be carried out in an integrated form. Rehabilitation should include all physical infrastructure like road, air, sea, river and railway transport, power and water plants, communication equipment and installations, port, storage and distribution facilities as well as institutional set-ups in terms of definition of functions and accountabilities. That is, de-bottlenecking the physical and institutional constraints.

3.1.2. Revitalization of Public Enterprises

The genesis of Government investment and ownership in industries is not necessarily

based on ideology. Governments in the subregion entered industrial investment mainly because of (1) the absence of domestic entrepreneurs and reluctance of TNCS, (2) private enterprises have been reluctant to make investment due to the heavy nature of the investment and low return expected from the investment (power, water, strategic projects like cement, oil refineries, ports, railways, etc), (3) some foreign private owners abandoned their plants after independence) and (4) nationalization on ideological ground.

Generally public enterprises in the sub region are in a very weak situation. Their problems are worse than those of private enterprises; and their performance in terms of productivity, capacity utilization, management, maintenance and repair, cost and price controls, profitability, etc, is much poorer than of that of private enterprises. The cause of their poorer performance must not, however, be attributed just merely to the principle of the state ownership because there are state owned enterprises in Latin America, Asia, developed north, and even in Africa (Ethiopia Airlines, Air Malawi, power and water corporation in Botswana and Ethiopia) operating efficiently with surpluses. Thus inefficiency and poorer performance of public enterprises are caused by structural problems, wrong macro-economic management and policy measures. These include, among others (please see subsection 2.2.4.2.), redundant labour; weak/lack of definitions in responsibilities, accountabilities and performance criteria and evaluation; and low pay to management and thus low morale; etc.

3.1.3. The Remedial Measures

(1) Define clearly the functions, responsibilities and accountabilities with proper autonomies regarding authorities of management of public enterprises and performance contract based on rate of return on investment; (2) intensive training in technical, and managerial skills; (3) rationalize pricing to include depreciation charge on re-valued assets basis, market interest rates,transport, water and power tariffs and land and building rates; (4) to make selection, appointment and promotion of management on the basis of qualification, experience and competence and divorced from political consideration and nepotism; (5) remove redundance of labour; eliminate social functions from the public enterprises (including cross-subsidizing consumers, construction and operation of schools and hospitals, housing, etc). If public enterprises are required to fulfil such social functions proper accounting must be made so as to be refunded by Government; (6) there should be a legal limitation on the supervising Ministries/Departments regarding their supervisory authority/roles. Public enterprises should earn adequate rate of return on their invested capital and contribute to the budget rather than draining it. If necessary restructuring debt equity ratios should be carried out. Indeed privatization should be carried in the long run particularly divestiture of losing enterprises. But privatization by itself can not make the enterprises profitable with out revitalization and financial restructuring. In other words, the most important issue is not privatization but revitalization and financial restructuring in an integrated packed described above; and the issue of privatization should be taken as an entity by itself or if privatization is taken it

should integrate revitalization an financial restructuring.

3.2 Programmes of Expansion and New Industries

3.2.1. Assessment National Programmes of Expansion and New Industries

As in the case of rehabilitation, all the 16 countries in the subregion have each identified their national priorities of expansion and new industries, among others, in (a) metallurgy (b) engineering, (c) chemicals, (d) agro-industries, and (e) construction and building industries. (Please see Annex II).

(a) Metallurgy: National priority projects identified in metallurgy include rehabilitation, modernization, diversification and expansion of the (1) existing integrated iron and steel plant (Nigeria); (2) national steel rolling mills (Ghana, Togo, Liberia, Guinea, Sierra Leone, Mauritania, Côte d' Ivoire); (3) new projects in several countries for production of sponge iron based on direct reduction process; and (4) establishing some new aluminum metals (Ghana Nigeria and Guinea).

(b) Engineering: National priority projects in engineering also include (1) agricultural machinery, tools, equipment and implements (Ghana, Nigeria, Senegal, Burkina Faso, Guinea, etc); (2) foundries, machine tools and spare parts (Nigeria, Ghana, Burkina Faso, Mali, etc); (3) mechanical and electrical equipment (Ghana, Nigeria, Guinea); (4) irrigation and water pumps (Senegal and Burkina Faso; (5) assembly of household goods and vehicles (Nigeria); (6) solar energy equipment (Senegal, Mali and Burkina Faso). (7) farm tractors (Nigeria and Senegal); and Motor cycles (Togo).

(c) Chemical: National priority projects in chemicals are (1) enrichment of phosphate fertilizers (Senegal, Burkina Faso, Niger, Mali, Togo, Mauritania, etc), (2) dia amonia (Nigeria and Côte d' Ivoire), (3) mixing fertilizer (Ghana, the Gambia,Guinea, etc); (4) pharmaceutical from local traditional plants (Senegal, Guinea, Niger etc); (5) petro-chemicals (Côte d' Ivoire, Ghana and Nigeria); (6) soap and detergents (the Gambia, Ghana, Liberia, Guinea, Nigeria etc); and (7) pesticides (Senegal, Ghana and Nigeria).

(d) Agro-Industries: The national priorities in agro-industries are numerous and practically all the 16 countries in the subregion have at least 3-4 projects. They include (1) grain milling, bakeries and pastries; (2) fruit, vegetable, meat and dairy processing and preservation; (3) edible oil mills, (4) textiles and garments; (5) leather and leather goods; (6) wood processing, pulp and paper mills; (7) fishery; and (8) beverage and tobacco processing.

(e) Construction and building industries: National priority projects in construction and building industries are cement, bricks, lime, ceramic tiles; fabrication of metal hinges, window and door frames; wooden panels, doors and window, steel rods; and metal sheets for roofing. (Togo, Benin, Ghana, Côte D' Ivoire, Nigeria, Senegal, etc)

Like in the case of rehabilitation, expansions and new industries in core and strategic sub-sectors would have positive impacts on subregional economic cooperation and integration if they are properly coordinated through exchange of information on and synchronization of investment, purchase of inputs, marketing outputs, training, design and transfer and adaptation of technologies, and production of spare parts, components and maintenance services through sub contracting and complentarities.

On the other hand, independent increase in the national production in core industries through expansion and new industries without subregional coordination and consultation would create duplication of projects and excess capacities in some sub-sectors and shortages and bottlenecks in others, and thus fail to benefit from subregional economic cooperation and complementarites. This might strengthen the existing nationalistic and protective attitudes towards domestic industries and thus retard progress made on sub regional economic cooperation (see also next section)

There are already some of duplications on the new national projects which may lead to competition and excess capacity utilization. In order to avoid such duplications the Subregional Industrial Master Plan (SIMP) presently under preparation by ECOWAs, should urgently be introduced. The SIMP should assist in guiding allocation of new industrial projects among Member States based on comparative advantages (availabilities of abundant raw materials, labour, infrastructures and markets). The SIMP should also make efforts to make national industries to re-enforce each other at the subregional level through specialization, division of labour and complementarities, like sub contracting/joint production and marketing certain items of mass production and or requiring special skills and technologies.

3.2.2. Assessment of Subregional Priority Programmes in Expansion and New Industries

As has already discussed under sections 1.3 and 2.1, a number of sub-sectoral programmes had been identified, within the frame work of the First IDDA's programme, for industrial cooperation in the West African subregion. Indeed the implementation of the First IDDA programmes was a failure for many reasons already explained. The objectives of IDDA I and the criteria (see Annex 4) of selecting its programmes in specific core and strategic projects have, however, been still valid. But the absence of availability of promoters in the criteria remained a big draw back. Although the availability of promoters has been assumed to be included under the Second IDDA, most of the priority projects in Annex 3, do not have still committed promoted. Thus the specific projects identified as priorities under the IDDA I in the

sub - sectors of (a) metallurgy, (b) engineering, (c) chemicals, (d) agro-industries and (e) construction and building industries have been retained as on-going to be implemented under IDDA II. The number of these core projects under IDDA II, is 43 while the number of supporting projects is 17. The list and phasing of these 43 core projects is given in Annex 3.

Assessing the current status of each of the 43 projects in the list would be very difficult because there have not been any regular monitoring, follow-ups and progress reports on them. Furthermore, the projects are scattered between ministries and departments even at the national levels. That is, no central coordination in the host countries. Most of the projects are also located in Guinea, Nigeria and Senegal, creating further pressures on implementation capacities, without identifying private promoters.

These projects have been promoted since 1983. As already explained under sub section 2.1.2, two of the 24 projects in the first category (Glass Container in Liberia and Mobile Mini Oil Mill Production in Guinea/MRU) have been completed while one (the Diesel Engine Plant for trucks in Nigeria) seems near completion. Seven of them are ready and waiting for financial arrangements. The rest 14 have not made much progress beyond pre-feasibility and feasibility studies. Of the nine medium term projects a feasibility study is made only for one, and the rest are at conceptual or preliminary stage. All the ten long term project have failed to move beyond conceptual stage still.

It also appears that some of them have been kept in the list for formalities while in practice they have been abandoned or put off by the host countries. The Ammonia and Urea Plant in Côte d' Ivoire and the cement factory in Liptako Gourma, for instance, seem to be abandoned while the phosphate plant in Togo is put off until the international market for phosphate fertilizers would be improved and the ceramic project in Togo is laid-off due to lack of promoters. Indeed interests for some of the projects have changed.from subregion to national. This includes the Liptako-Gourma subregional phosphate fertilizer project which appears to be recently suspended as the member states have preferred to have their own independent enriched phosphate plants. Other information also indicate a few new priority projects outside the list have already been implemented/near competition on a national basis. The integrated steel mill and the Ammonia and Ureas Plant in Nigeria are good examples. These projects have been envisaged quite in advance at the national level since the Nigerian market by itself could be as large as a subregion. But due to the general recession in Nigeria because of the decline in oil prices, the domestic market might not absorb all the outputs. Thus it would be better to make these two plants through rehabilitating, consolidating, expanding and diversifying their products lines subregional ones than building new ones on similar lines.

Other new subregional projects (outside the list) include the manufacture of railway wagons (based in Burkina Faso), the electrical and telephone cable wire, leather and shoes, and meat canning industries. The railway wagon project, being promoted by the national railway companies of CEAO, interested private companies and a Belgian technical partner is a matured project with a feasibility study and financing arrangements with the ADB, BOAD and the Islamic

Development. Implementation is suspended due to failure of agreement between the promoters and the national railway of Burkina Faso, whose premises the project is expected to use. The electrical and cable wire project has also been a matured project with a complete feasibility study, and financing arrangements. The promoters were the Indian Metha Group (51%) based in Cameroon and the national electricity and telephone companies (49%) in CEAO. The project is put off because the national electricity and telephone companies failed to raise their equity shares and the Metha Group is reluctant to go alone. Other projects like meat and fruit canning, animal feeds and leather and shoes projects have been identified to be undertaken by the members of the Liptako Gourma Integrated Development Authority (LGA). But all of them remain suspended due to the strong tendencies of Member States to have their own national projects.

There also seems some duplications in the subregional projects. The expansion in ICS's Phosphate Fertilizer Plant in Senegal, new Phosphate Fertilizer Plant in Togo, Phosphate Fertilizer Plant in Nigeria, and Phosphate fertilizers in Liptako-Gourma are good examples. Similar duplications have tended to appear in food processing and development of pharmaceutical projects.

The other problem that could be easily noticed is that the list (43) is too long taking into account the experience from the First IDDA, the financial, technical and managerial capacities of the national Governments and the subregional Inter-Governmental organizations (IGOS). It is, therefore, recommended to select three-five core projects and intensify the efforts of IGOS over the next 2-3 years on the five thus selected. Based on such experience and results other short list may also prepared. This does not mean, however, that individual member countries would be stopped to promote the remaining subregional projects if they wish they could do so. Thus the following five projects are suggested based on the simple criteria of the short term stages they are put and adequate preparation already made like feasibility study, readily availability of promoters existing infrastructures and organizations since some of them are expansion and diversifications of existing plants.

1. The expansion and diversification of the Ajoukuta Integrated Steel Mill in Nigeria.

2. The manufacture of Diesel Engines for irrigation pumps and generators, Guinea.

3. Expansion of Phosphoric Acid and Fertilizers of ICS, Senegal

4. Rehabilitation and Expansion of Mamou Agro-Industrial Company (fruits and vegetable processing) SAIG-Guinea.

5. The Onigbolo Clinker/Cement in Benin.

The Ajoukuta Integrated Steel Mill (AISM) should be promoted as a subregional project rather than having a new one through expanding and diversifying its product lines into metal

sheets, metal squares for window and door frames, metal pipes, different alloys and quality steel for the manufacture of further engineering production in the subregion. Diesel engines for irrigation pumps and generators would have ready markets in the subregion like along the Senegal and Niger Rivers for irrigation and drawing well water in the Sahelian region including smaller thermal electricity generation in the rural areas in the whole subregion. Whether to expand the ICS or building a new one in Togo to produce Phosphoric acid and phosphate fertilizers could be debatable. But to keep the argument short, it would better in the short run to rehabilitate and use the existing facilities/expansion on a marginal basis before trying to build new ones. Even if we prefer to build the new one in Togo, we do not know when the international market for fertilizers would recover and the time would be lost. Thus it would be better to concentrate our efforts on putting in order the existing ones from which we would also gain experiences.

The rehabilitation and Expansion of Mamou Agro-Industrial Project (SAIG) would expand and diversify its products through making its machines and equipment versatile/flexible to process different fruits (mangoes, papayas, pine apples, guavas, passion fruits, avocadoes, etc) and vegetables (tomatoes, carrots, legumes, spinaches, etc) maturing at different seasons of the year. The quantity of tomato, pastes imported into the subregion alone is enormous.

The shortage of limestone (suitable for cement) in the subregion and the continuous import of clinker into the subregion from Europe despite the closure of the clinker plant in Togo has been disappointing. We have already suggested under 3.1.1. to make another effort to rehabilitate and open the clinker plant in Togo. As the demand for clinker in the subregion is so large, the expansion of the existing clinker/cement mill in Benin should be given equal priority. That is, the subregional demand for clinker and cement is more than 10 times larger than the installed capacities of both CIMAO and Cement Company of Onigbolo (SCO).

In brief, the strategy should, therefore, be to select a very few, say 3-5 key projects, and intensify efforts to promote them. In this respect it would be advisable to make the Ajoukuta Integrated Steel a centre of focus for the development of steel mill with backward linkages to the development of mines and metallurgical industries (iron, manganese, coke coal and non-ferrous metals) and forward linkages for the development of engineering industries. Thus Ajoukuta Steel Mill should diversify its product lines to supply inputs to two or three selected engineering industries (like the manufacture of railway wagons, wires and cables for electricity and telephones, and diesel engines for irrigation pumps and power generators at subregional level. The Ajoukuta Steel Mill could also produce inputs for the national rolling mills, and engineering industries like farm implements, tools and equipment) all of which are presented imported.

With regard to fertilizers the strategy should focus on the development and expansion of ICS to supply the sub-region with fertilizers as well as to become the centre of fertilizer technology for the subregion. Thus concentration on the development and expansion of one integrated steel mill, two or three engineering industries and one fertilizer plant at subregional level would be realistic within the decade given the complexities of such industries and the

implementation capabilities of Member States.

The successful implementation of these industrial projects on subregional basis, will assist the subregion to bring positive structural changes industrial production, and reduce their dependence. That is, it will enable the subregion to produce its own intermediate and capital goods presently imported. Such production of intermediate and capital goods will create inter- and intra-sectoral linkages of industries within the economies and make the multiplier effects work internally, and thus to bring a break-through in industrialization.

PART IV

APPROACHES FOR ACHIEVING COUNTRY AND SUBREGIONAL PRIORITIES IN WEST AFRICAN SUBREGION

4.1. New Modalities for More Effective Subregional Industrial Cooperation

The problems and constraints of subregional industrial cooperation, particularly those which have impeded the implementation of the First IDDA have been adequately discussed in Part II of this report. In order to avoid similar problems and constraints, there is an urgent need for restructuring and re-orienting the operational modalities and strategies of the subregional cooperation and groupings for more project implementation capacity.

In the first instance, the West African subregion "having the highest number of sectoral and multi sectoral IGOS", needs to remove the existing duplicating and overlapping functions and responsibilities among these sub-regional organizations. Many of the organizations are competing for the same funds and yet have duplicating functions despite the shortage of funds and staffing. They should therefore coordinate and harmonize their functions. Since ECOWAS is the only subregional IGOS to which all the 16 countries are members, it should take the lead role in harmonizing their activities. The IGOS in the West African subregion should also learn from Maghreb subregion and SADCC experiences. "Both SADCC and Maghreb approaches have avoided using cumbersome secretariats and hence the inherent delays in such arrangements. Early attention is also paid to the actual implementation agency, be it the Government itself, a Government enterprise or a local or foreign partner. Early attention is also paid to the important question of financing, whether this is at the study stage or the financing actually needed to get the project implemented".[8]

Subregional cooperation should be based on common genuine interests and benefits on a voluntary basis with in - built mechanisms to withdraw for any members or for any new one to join later with all the terms and conditions set up/well defined in advance. For instance, Nigeria and Ghana may join with Guinea to exploit the iron ore deposit in Nimba Mountain. The iron ore would be converted to steel in a plant located in Nigeria, in which both Guinea and Ghana have options to invest in, probably Côte d'Ivoire would also join the steel plant, while Ghana may decide to withdraw from the Nimba Mountain Mines but would increase its share in the Nigerian steel mill. Guinea is interested to join the steel mill to secure a market for its present and future export of iron ore as well as steel for its rolling mills on a long term basis, while Nigeria in securing raw materials for its steel mills. Similarly Ghana and Côte d' Ivoire are interested to secure steel inputs for their domestic constructing and engineering industries on a long run basis at reasonable prices.

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[8] UNECA/UNIDO "Report on the Independent Mid-Term Evaluation-of IDDA and proclamation of the II IDDA" Ibid p-85.

Subregional cooperation would be based on a desire to diversify investment location/supply of raw materials, probably to take into advantage the availabilities of cheap labour, power and abundance of natural resources, For instance, Nigeria may join the MRU (Guinea, Liberia and Sierra Leone) in a multipurpose liver basin development for integrated agro-based industries, the products of which could be marketed in Nigeria at reasonable prices.

Cooperation would also be for the need to expand and grow to keep up with oligopolistic foreign competitors. Expansion and growth in establishing petro-chemical industries (fertilizers, pesticides, and plastic goods like pipes, artificial fibre, etc) among Nigeria, Senegal, Côte d' Ivoire, Ghana, Sierra Leone, etc would be initiated. Similarly joint pioneering would be made in converting bauxite into alumina and aluminum metals to marketed subregionally.

Joint-Pioneering in using materials and development of abundant local materials has big potentials in West Africa. For instance, production of powder milk, cacao, coffee could be jointly developed and marketed through joint promotion and sales power. Similarly joint pioneering could be made in the use and development of molasses for starch, yeast, alcohol, and animal feed. Crop waste, fruit husks, kernels and oil cakes could be mixed to get animal feeds; and alum waste from fertilizer manufacture could be used for water treatment plant, etc.

Once general agreement is made on subregional cooperation, detailed negotiations on terms and conditions of agreements should be passed to national interested cooperating companies. The national interested cooperating companies could be parastatals and/or private enterprises (domestic/foreign) which could be able to negotiate details on cooperations, like equities, loans, purchases of inputs, sales of outputs, qualities, quantities, standards, prices, marketing strategies, appointment of board members and management, plant design and capacities, training workers, bidding procedures, etc. What is important here is all the terms and conditions of the cooperative agreement would be handled on a purely economic and business manner, without any political implications. Exclusion of politicians and ministers in the board of such joint ventures/cooperative plants would be better because even if some political misunderstandings come up later at government levels the plants would continue their normal businesses irrespective what the politicians feel.

Similarly appointment of project management, recruitment of senior managerial and technical staff should be divorced from political consideration. It is usually better if private enterprises in the cooperating countries are included and the management is delegated/left to them. That is, ensure that there is owner-operators. Generally the private enterprises as owner operators, assuming other things being equal, know much better and sense and examine more efficiently the viability of commercial projects than civil servants working on a part-time. They make adequate attention to control investment costs, arrange markets and financing. But one must also be careful that the owner-operator should have a substantial share in the plant to be really involved in the risk and successes of the plant. The management fees should also be based on the profit not on gross cost or revenue. Such approach could avoid the mistake made in the case of CIMAO and SSS. That is, management fees should be based profitability

performance/rate of return achieved on capital.

In order to avoid dispute on location of plant, disaggregation of investment and production should be considered. This is usually possible in the case of engineering plants. That is, production of components in different countries which would specialize, say, in engine, axles, tires, crumshaft, piston and cylinder, etc. Indeed benefits should not usually be associated exclusively to location, as stable supplies of inputs/consumers goods over a long run could equally be beneficial.

One of the most important strategies or considerations in the subregional cooperation is to assume full costing and prices for all the inputs (raw materials, power, water, land, etc) including, deprecation charges, interest, expenses, plus adequate rate of return on capital from the start, and keep this concept all the way through. In this view management must know marketability of the products in member states would depend on international competitiveness of the products (both in prices and qualities), not on the existing agreement alone. In this respect the joint venture plant should continuously monitor the evolution of its markets and products and accordingly adjust its competitive market strategies including fighting back transferring prices/dumping both through legal and economic means like discounting, rebating and marginal costing. etc. One of the problems in the subregional trading is the problem foreign exchange shortage and confidence of local banks to extend credits/discount export bills on exports to the subregion. The subregional central and commercial banks should reach some agreements not only to guarantee honoring such payment but also to give priority in allocation of foreign exchange to imports from the subregion.

Other modalities of subregional cooperation should include the formation of inter-corporation councils, like West African Sugar Council, West African Iron and Steel Council, West African Fertilizers' Council, West African Council for Petroleum Refineries, West African Grain Milling Council, West African Electricity Council, West African Railway Council , etc, where member corporations meet regularly to exchange of ideas, experience and information; and may agree to share joint training, repair and maintenance facilities; make joint purchase and marketing strategies; exchange experts; make joint research and effort to transfer, adapt and assimilate technology and designs; and agree on common standardization to suit their common purchases, repair and maintenance, and exchange parts/and components.

Similarly national corporation operating on the same lines would exchange members of board of directors (like the USA Commercial Banks and Oil Companies do); or make cross-purchases of nominal shares and joint production of new components (like the practices of international electrical companies); joint formation of consultancy services in their lines of industrial activities; and joint development in forward and backward linkage industries; and inter-agency appointment in each others' countries and market each others products on nominal basis/as occasional surpluses/shortages, arise; and agree to specialize in producing different parts on different lines of production within the same industries.

It would also be appropriate to recognize, legalize and encourage the existing across the border trades in the subregion. Despite various tariff and non-tariff barriers border trades have been going-on between neighboring countries in the West African Subregion. These trades have been based on the needs of the people, shortages/surpluses of goods to be traded, the price differentials including the foreign exchange parities, etc. The purchase of fuel in Nigeria by its neighbors, cattle trade, the Ghanian cocoa to Côte d' Ivoire, textile and garment products to Nigeria, etc, are good examples.

Further modalities to be proposed are, (a) to change the attitudes of national political and business leaders so as to make them realize the long run benefits of subregional economic cooperation; (b) use study tours for these leaders to Asia, Latin America as well as the subregions to see by themselves the better conditions, performance and opportunities there; (c) exchange staff among similar/cooperating national companies and businessmen through chambers of commerce in the subregion; (d) extend invitation by interested countries/plants with free tickets and accommodation to prospective partners/customers to tour their production plants, mineral deposits, services, etc; (e) increase publicity by chamber of commerce/central banks up to dated information and data on possibilities of export-import to/from the subregion; (f) use publicity campaign to explain the long term benefits of subregional economic cooperation, and address the publicity to specific interested and influential groups; and (g) change the political policies to create socio-political and economic stability through democratization and liberalization to gain confidence of national and foreign investors, donors, bankers and trading partners.

4.2. Financing Resources

The adequacy and timely availability of financial resources are the critical requirements in the implementation and successes of the Second IDDA. It is in this recognition that the Conference of African Ministers of Industry in adopting the Second IDDA programmes in the resolution 1 (X) "appeals to African countries and African intergovernmental organizations, particularly financial institutions, to take the necessary measures to ensure the successful implementation of the programme for the Second IDDA and give priority to the mobilization of their own financial resources for the implementation and monitoring of the programme". This emphasizes that most of the funds must be raised by the African countries and African financial institutions. These financial resources have to be raised from the Government budgets, surpluses from parastatals and private firms, savings from individuals, pension and insurance houses, national central, commercial and development banks and the regional and subregional development banks/funds, and export surpluses.

Most of the African Governments have already heavy constraints in their national budgets and thus carry large deficits, and sometimes even to cover recurrent expenditures. Following the IBRD-IMF SAP, African Governments could, however, generate more saving in their budgets through improving their tax collection, tax bases and coverage, revising government

fees, rates, charges and dues on cost recovery basis; and reducing their recurrent expenditures through eliminating redundancies in civil service structural organizations and staffing, subsidies to public enterprises and on consumers' goods, the heavy defence and security expenditures, and unnecessary allowances to officials, fuel and travel expenditures. Revitalization of public enterprises like rationalization of prices and charges on their products and services including power, water and transport tariffs; postage, telephone, port charges; and rates on urban lands on full cost recovery basis; adequate depreciation charges on revalued asset basis; and interest expenses plus adequate rate of return on capital would easily generate surpluses.

Domestic financial resources would also be raised by the surpluses to be generated from private enterprises (indeed allowing them to rationalize their prices); private individual saving through offering reasonable interest rates on deposits (above inflationary rates); from the pension and insurance houses; and as well as from the banking institutions. Many of the countries in the West African subregion have at least one or two development banks/investment corporation/funds to finance, among others, industrial projects. These national development financial institutions are usually assisted by Government budgets, external lines of credits, etc. External equity injection into these national banks (like from ADB, IFC, EIB, KFW, FOM etc). could also enable them raise additional funds as well as strengthen and improve their managerial capabilities.

Similarly national commercial banks could give priorities to lend to manufacturing in a form of working capital on a basis of roll-over and medium term loans with the national banks giving them liquidity guarantee in case of rush for cash on the commercial banks. The national/central banks could also lower its discount rates for negotiable bills/promissory notes drawn on loans to manufacturing enterprises. Specific credit programmes with integrated extension services schemes to small-scale industries and the informal sector require urgent attention. The national/central banks together with the commercial banks, insurance and pension houses and other financial institutions could initiate the development of domestic capital markets like bond, stock and share trading.

The major regional financial institution is the ADB group which could, among others, provide financing for the Second IDDA programme for the subregion. The ADB group provides project lending, lines of credits (to national development banks); sector investment and rehabilitation loans; sector adjustment (policy support) loans to specific sector/subsector); structural adjustment loans; technical assistance loans; loans to subregional projects and national projects having subregional complementarities. ADB group also joins efforts with ECOWAS Fund, ECO-Bank, BOAD, FCD (Funds communautaire de développment), and FOSIDEC in organizing joint missions studies, project identification, appraisal, evaluation, supervision, training, consultancy and exchange of information. ADB group also plays a catalytic role and as a lead financier in attracting the non-regional financiers to a participate in the financing national and subregional industrial projects in the subregion.

The subregional financial institutions are (a) the Banque Centrale des Estats de l' Afrique

de l' ouest (BCEAO), [9] a monetary agency for CEAO members, which plays a major role in the formulation of monetary and development finance policies and credit regulation and coordination; (b) Banque Ouest-africaine de développment (BOAB) - a common development finance institution for BCEAO members. It promotes development and economic integration among member countries; (c) Fonds Communtaire de développment deals with contracts and market research, supplies, projects and subsidies within CEAO; (d) Fonds de solidarité et d' intervention pour le développment de la communauté (FODISEC) within CEAO; (e) ECOWAS Fund for co-operation, compensation and development of ECOWAS - including acting as a clearing house, financing studies, development activities and guaranteeing foreign investments;and (f) Eco-Bank which mobilizes and promotes investment, both from local and foreign sources, promoted intra-ECOWAS trade and assist rehabilitation projects.

As subregional projects are not generally appealing to/or considered priorities for multinational and bilateral donors due to their broadness and vagueness, who usually look for specific and well defined projects, most of the funds for subregional projects should be raised from national, regional and subregionl sources. Both national and regional resources are, however, limited compared to the needs for successful implementation Second IDDA programmes. It is in this view that the Conference of African Ministers of Industry in adopting African common position for the Fourth Session of the General Conference of UNIDO in the resolution 2(X) recommend that:

"(i) bilateral and multilateral development finance institutions, including regional development banks, the EEC Regional Development Fund and the European Investment Fund should make special allocations for Africa's industrial development and assist in carrying out such studies as to facilitate investment decision; and (ii) developed countries, particularly in their bilateral assistance programmes, should make special allocations for promotion of African industrialization through incentives for direct foreign investment in the industrial sector in Africa".

The major multinational development finance institution is the World Bank group (IDA and IFC) which, like the ADB, provides development loans on a basis of general and multiple purpose and or specific projects/sector loans. The World Bank group has excellent experience and capability for project appraisal and evaluation, training facilities for staffs coming from developing countries and could act a catalytic role/lead-financier in coordinating other financiers to participate in industrial projects. Other multilateral and bilateral financiers include EIB, EDF, BADEA, the Islamic Development Bank, Kuwait Fund, Saudi Fund, Abu Dabi Fund, Nordic Investment Bank, KFW (German), FOM (Netherlands), CIDA (Canada), SIDA (Sweden), CDC (UK), NORAD (Norway), DANIDA (Denmark) and FINIDA (Finland). Apart from these, there are several bilateral aid agencies like the USAID and Japanese aid; export-import credit agencies;

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[9] Benin and Togo, which are not members of CEAO, are members of BCEAO while Mali and Mauritania, which are members of CEAO, are not members of BCEAO.

foreign commercial banks' credits; and suppliers credits. There should, however, be careful appraisals and selection of bilateral (unless it involves 100% grants), export-import and suppliers credits/financing resources because they could be very expensive in prices; and terms and conditions of tied aid/loans could usually be problematic in selection of technology, supplies of spare parts and components, training, erection and operation later. One of the best approaches in such bilateral tied loans and suppliers' credits is to first determine the specifications of plants, machinery and equipment with the assistance of independent consulting/engineering firms, and then tender among contending suppliers with the option to come up with financial backing/offer assisted by their national governments/financial institutions. Such options are now recognized by the OECD countries. For instance, the Morupule Power Station Project in Botswana carefully exploited this strategy in tendering turbine purchases, the prices of which came to be lower than through international competitive bidding insisted on by IBRD/ADB.

Other external financing sources include the traditional hire-purchase (lease-purchase); floating bonds, debentures, stocks and shares in international markets; the recent development in debt equity swaps; et. The IMF-SAP policy oriented short term loans could also assist rehabilitation and revitalization of existing industrial enterprises through making available foreign exchange to import spare parts, intermediate in puts and replacement of equipment and machines.

Funds from the UNDP-IPF, and UN bodies like UNIDO, ILO, UNESCO, etc could be good sources technical assistance to carry out feasibility studies, long term assignment of expatriate personnel to advise in planning, operating plants, training personnel, monitoring and evaluating industrial projects. Although UN funding are small in amount they play a crucial role as seeds money in initiating project development

One of the major external financing resources for industrial investments is foreign direct private investment (FDPI). FDPI does not involve loan and interest repayments. The investors take the risk in the ventures and thus ensure appropriate feasibility studies, choice of technology, management, production controls in terms of costs and qualities, and market strategies. But most of the FDPI is among developed countries of the North, and the newly industries countries of Asia and Latin America. The share of Africa has been small and declining. Only a few countries in the subregion like Nigeria, Côte d' Ivoire and Senegal have attracted some mostly in mining. FDPI usually prefer larger growing domestic markets and savings, indigenous entrepreneurs to cooperate with, professionals and skilled workers, political and economic stabilities, developed physical and institutional infrastructure like India, China, Korea, Brazil, Mexico and Egypt. Similarly FDPI has begun to be more attracted to Russia and Eastern European countries than to Africa.

Thus African countries in the subregion should make more efforts to attract FDPI in providing investment climates (political and economic), improve physical and institutional infrastructures, strengthen training of nationals, revamp investment code, establish "one stop" one window" to assist investors, improve foreign exchange availabilities for importation of inputs and remittance of dividends, give FDPI freedom to choose ownership shares and access to world

price inputs, etc. In return for such privileges, the Governments could ask "performance guarantee" from FDPI. in form of development of local skills and raw materials, transfer of technology, export performance and profitability.

Both foreign private and domestic investors have had bad experience in expropriation and nationalization without fair and prompt compensation and thus show much reluctance in long term investment. Africa countries must prove that they no longer repeat such practices through introduction of constitutional protection and guarantees against expropriation and nationalization of private properties and industries:

The West African subregion should urgently introduce the Industrial Master Plan to assist the allocation of industries among the Member States. Similarly the Member States should also standardize their investment codes to harmonize and coordinate their dealings with EPDI.

Regular tripartite meetings composed of representatives of Government, domestic and foreign private investors should be established to review, discuss and improve the general investment climates.

4.3. Development of Human Resources

4.3.1. Development of Entrepreneurial Capabilities

Entrepreneurs play a key role in taking risks and investing their capital in manufacturing. There is, however, lack of strong entrepreneurial base in the subregion. The stock exchanges/capital markets have not been well organized. Private manufacturing enterprises are mostly controlled by expatriates/TNCS. It is in this view that all the 16 countries in the subregion emphasize that the creation of indigenous entrepreneurs hold a priority in industrialization.

Indigenous entrepreneurs, if available, usually gear their efforts in land speculation, housing, retail and wholesale trades, laundry, restaurants, hotels and to a small extent in export-import, and other informal sector. Thus policies must be reformulated to induce indigenous businessmen to invest in manufacturing. Government should also upgrade nationals engaged in mere trading activities, informal sector and small-scale enterprises through a series of policy measures. Small-scale enterprises and the informal sector are producing goods and services meeting basic needs; they are labour intensive with low investment; less affected by international economic fluctuations; suited to assimilate and copy technology; have low import content. Serve both rural and urban areas; and could be potential link between large and medium scale industries. Thus entrepreneurs in the SSE and the informal sector should be assisted to enter manufacturing.

Apart from upgrading SSES, action must be taken (i) to identifying the class of people to be developed to entrepreneurs from graduates, skilled craftsmen in the informal sector, retired civil servants and professionals; (b) preparing learning packages and investment opportunity profiles; (c) developing a package of incentives and head-start programmes including soft loans, grants, low equity contribution; (d) using local consultants for industrial extension services; (e) identifying growth poles and negotiating an ancillarization and sub contracting. A national small-scale and informal sector corporation/agency should be created to promote and sponsor policy measures like special credits, tax concessions, simplifying licensing and permit procedures, land grants, purchase/supply of inputs, rewarding them with government contracts marketing, storage and distribution of outputs as well as costing and pricing practices. Support services should be provided both through industrial estates bringing entrepreneurs to service centres (export zones, and free trade areas, etc) and taking the support services to where the entrepreneurs are located (rural areas, to villages, urban areas, etc).

4.3.2. Development of Managerial Capabilities

Managers optimize factory productions and business operations through proper combination of factors of production, and coordination of production material management, maintenance, quality, inventory and cost controls, personnel management, infrastructural support (power, water, transport and communications), marketing, storage and distribution, pricing outputs and finance. Managers are responsible to stimulate productivities, improve regularly input-output mixes and finally optimize profits. There are nevertheless critical shortages of skilled managers at all levels in the subregion. Managers are trained on the jobs and post-experience courses and business schools. Their training should include investment analyses, debt management, production, inventory holding, purchasing, marketing and price strategies, cost accounting and personnel management.

4.3.3. Development of Technical Capabilities

Technical capabilities come from higher levels of educations and acquired skills. They include legal and analysis of the structure of economic institutions, research and development, consultancy and engineering services (skills in project identification, preparation of feasibility studies and project appraisal), supervisory, management, financial planning, contract negotiation, plant creation, installation and operation skills. Such skills are in critical shortages in the subregion. Thus more efforts should be made to develop the technical capabilities in the subregion through reviewing and synchronizing the curricula of higher learning institutions with the needs of industries, establishing centers of excellence for specific technical skills training; strengthening and expanding science and technology institutions; demand oriented training programmes like emphasizing skill acquisition in joint ventures, internship, on-the-job and in-the service training; funding engineering schools to teach courses in manufacturing system analysis and design, manufacturing processes, design engineering, production management and

engineering, industrial finance and marketing, energy economics, industrial economics, biotechnology and computer science; promoting and developing entrepreneurial and management skills for public enterprises through incentive mechanisms for better performance. Other modalities to develop technical capabilities include involving nationals as counter-parts to expatriates in project identification, feasibility studies, design, selection of tender, erection and commissioning; emphasize the concept of teaching company, and use specialized training facilities and institutes on a subregional basis.

4.3.4. Developmentof Technological Capabilities

Technological capabilities are arts embodied in the skilled workers who have gone both through academic training and practical experience in production processes and machine operation. Thus the development of man-power and technological capabilities are inseparably embodied together. The West African subregion would probably gain from the Japanese experience. The Japanese made conscious and deliberate efforts through consistent and coordinated programming procedures with full social, political and economic will, determinations and commitments as well as proper institutional machinery and policy instruments. The strategies they adopted were:

(a) machines and equipment were bought not only for production of goods and services, but also to learn on them;

(b) foreign experts were recruited not only to erect and operate machines, equipment and manage production enterprises but also to teach nationals how to erect and operate the machines, produce the goods and manage the enterprises and market the outputs;

(c) contract renewal for foreign experts depended mostly on their willingness and cooperation to impart their skills to their counterparts;

(d) localization in one project would enhance the experts to win contracts in other new projects;

Apart from this, Exhibition were held to stimulate technological transfer, innovation, assimilation, imitation and copying; promotion of natural science and engineering degree courses; encouragement of on-the-job and on-the-service training. In patent licensing they excluded certain products, and processes and reserved the rights of the state to revoke,
e.g. capable and easy to imitate pharmaceutical, mechanical, etc, processes and products were excluded and the list was enlarged based on the capability of nationals to copy and imitate.

The strategy of "teaching hospital" was introduced in polytechniques, engineering colleges and institutes of higher learning as well as in production in enterprises like power generation,

telecommunications, aircraft, railways, shipyards, and factories. Students were allowed to spend more time in labs and workshops, and they got credits for internship-working in operating plants. There were regular meetings and discussions between plant managers and officials of higher learning institutes to link and coordinate the needs of plants to the outputs of the schools. Similarly, regular cross-visits were arranged between plant operators and university professors/students. Returning students from training abroad were evaluated not only by the diplomas/degrees they got but also by their capabilities to copy/imitate what they learnt.

4.3.5 Training Institutes/Facilities

All the 16 countries in the subregion have already recognized the need to develop their human resources and thus established various schools of middle and higher learning, like polytechniques, engineering colleges, business schools and universities as well as specialized institutes and centers training in management, technical, entrepreneurial, marketing, finance and accounting development skills. In some countries like Nigeria, Côte d'Ivoire, Ghana and Senegal the number of these schools and institutes are large and diversified. They all, however, have budgetary and staffing constraints. Thus more efforts should be made to strengthen them through provision of adequate budgets and staffs. They could usually attract support from bilateral technical assistance.

There is also a need to streamline and coordinate the activities of these schools and institutes to avoid duplication of activities and efforts so as to economize the use of scarce financial resources and specialist-trainers. Similarly the number consulting firms in management, project planning, feasibility studies, engineering, finance and marketing in the sub-region has increased. But most of the big consultancy works in the subregion are still contracted to overseas because (a) the funding for the work is coming from bilateral assistance, where the donor countries insist the use of their national firms; (b) if the funding is from multilateral sources the subregional consultants usually tend to fail to win through international competitive bidding; and (c) there are also some tendencies from governments to have more confidence in foreign firms. There should, therefore, be new policy measures to enhance subregional consultants to get more involved in the consultancy works. One approach is to establish criteria for minimum participation of national consultancy firms.

PART V SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

The objectives of this study are to make the leaders of the West African Subregion aware of potentials and merits of subregional economic cooperation and enable them create conducive investment climate, assist them rationalize the identification of national and subregional industrial priority projects and introduce a number of cooperative approaches policy measures and implementation mechanisms.

Historically retrospect shows many efforts have been made to bring industrialization to Africa through export processing and import substitution strategies to expand economic production base, diversify the economy and introduce fundamental structural changes to achieve sustained economic development and a higher standard of living. These efforts include the Lagos Plan of Action (LPA), African Priority Programmes and Economy Recovery (APPER), the IBRD-IMF structural Adjustment Programme (SAP), and the First ADDA. The results of all these efforts, however, been disappointing and thus the socio-economic situations in Africa have become disturbing and disquieting. It is in this view that the Second IDDA has been introduced to make further attempts to promote industrialization in Africa.

The West African Subregion consists of 16 countries, 12 of which belong to the 32 least developed countries in Africa, as well as 5 of the Sahelian countries (of which 3 are land-locked). The subregion comprises 20% of the area of the continent, and 33% of the population, which was 191 million in 1990 and estimated to reach 268 million in the year 2000 with annual growth rate of 3.3%. About half of the population is in Nigeria. Of the rest only Ghana and Côte d' Ivoire have more than 10 million each, five between 5-10 million and eight less than 5 million. The per capita income ranges from US$ 191 (Guinea Bissau) to US$ 1,137 (Ghana). The annual growth rates of GDP and MVA for the subregion were -1.83 and -0.14% respectively during 1980-1990.

The economic structure of the subregion is dominated by agriculture and light manufacturing industries with high dependence on imported intermediate and capital goods, foreign skills, investments and technologies.

The subregion has the largest number of economic groupings in the continent, like ECOWAS, CEAO and MRU. But they lack coordination, with overlapping/duplicating functions competing for scarce funds and staffing and thus fail to re-enforce each other through complimentarities.

The West African subregion identified about 45 subregional core projects in the fields of agro-industries, metallurgy, engineering, chemical and construction and building industries to be implemented during the First IDDA. But only two projects were completed during the decade while no substantial progresses were made on the rest.

The reasons for such draw backs were: small size of the national markets, structural weaknesses of the subregional economy, lack of willingness of member States and politicians to fulfil the commitments and resolutions they made for subregional economic cooperation and integration; lack of communication and coordination between member Governments and IGOS, between the different IGOS, and between each Government's Ministries and departments; absence of commitments by host Governments to promote projects; constraints in production and supply of raw materials and intermediate inputs; lack of sensitization of markets and forced circumstances to innovate the use and development of abundant local resources; historical trade and ownership ties to countries outside the subregion enhancing transfer pricing with-out at arms length deals; lack of participation by private enterprises; problems and constraints in the development of man-power, technological capabilities, institutional and infrastructural bottlenecks; shortages of financial resources; wrong macro-economic policies, general absence of enabling environment including absence of constitutional guarantee against confiscation and nationalization of private properties without fair and prompt compensation and payments, and lack of standardization of investment codes and industrial master plan in the subregion.

In the preparation of the national programmes for the Second IDDA, all the countries in the subregion have given top priority for rehabilitation and revitalization of existing industrial enterprises presently operating at 30-40% of their installed capacities. This is in view of the great potentials in increasing production. For instance, rehabilitation and revitalization would increase the capacity utilization from the present level to 70%, would double industrial production, MVA and employment at marginal investments. Such increase in industrial production would also reduce dependence on imports and save foreign exchange through import substitution as well as earning foreign exchange through export to the subregion. Rehabilitation and revitalization of existing national enterprises would also enhance subregional cooperation through expanding subregional trades, cooperation in joint training, production of spare parts, joint maintenance and joint sales promotion, etc.

Similarly priority should be given to the rehabilitation of multinational industrial projects like CIMAO, ICS, SSS and SCO.

Rehabilitation and revitalization should include, among others, repairs and maintenance, provision of foreign exchange to purchase spare parts, stabilize provision of utilities, remove infrastructural and institutional bottlenecks, improve managerial and technical capabilities, provide finance and improve subregional cooperation and macro-economic reform including rationalizing prices and removal of subsidies and restructuring and re-organizing public enterprises as well destitures if required.

The national programmes in the subregion have also identified new industrial priority projects in core industries (agro industries, metallurgy, engineering, chemicals and construction and buildings). There are, however, some tendencies of duplications of new projects between the member countries, which may lead to unnecessary competition and under capacity utilization. It is, therefore, recommended to coordinate and synchronize the establishment of new industries

in the subregion. The introduction of an industrial master plan and standardization of investment codes in the subregion would give guidelines in allocation of industrial projects among member States based on comparative advantage and thus promote specialization and division of labour, as well as joint production of certain components and subcontracting others through complimentarities.

Similarly 43 multinational industrial projects in the core industries have been identified to be implemented during the Second IDDA in the subregion. Most of these 43 identified as priorities have been actually been retained from the First IDDA as on-going. Thus the projects have been promoted since 1983 with-out much progress. Out of the 24 projects of the first category about 3 of them have already completed, 7 of them are ready and waiting financing arrangements, the rest 14 have not progressed beyond feasibility studies. Out of the 8 medium term projects a feasibility study is made for one, while the rest are at conceptual stages. All the 10 long term projects have been still at conceptual stage.

It thus appears that a large number of them have kept in the list for formalities while in practice they have been abandoned/put-off by the host countries. Interests for some projects have changed from subregion to national. Indeed some new projects having subregional implications(like Ajoukuta Integrated Steel Mill) have been implemented at the national level. Generally there are some duplications in the subregional projects particularly in agro-industries and fertilizers sub-sectors. Most of the projects are expected to be located in Guinea, Nigeria and Senegal creating pressures on implementing capabilities and financial resources. The list is also too long. It would thus be advisable to select 3-5 projects and concentrate efforts in implementing them during the decade. The major criteria of selecting the 3-5 projects should be their capabilities to bring fundamental structural changes in production of intermediate and capital goods to reduce dependence on imports and instead promote inter dependence among countries in the subregion; as well as presence of committed promoters. Thus these 3-5 industries should be in metallurgy, engineering and chemicals. These industries could even include the expansion and modernization of the existing industries like the Ajoukuta Integrated Steel Mill and the ICS (fertilizer).

The West African subregion should also re-orient and restructure its operational modalities and approaches for economic cooperation. These new approaches should include coordination of the functions and activities of the IGOS; to base cooperation on specific common interests and needs, desire to diversify trade and, investment location/supply/acquisition of raw materials, intermediate inputs and capital goods, and marketing and distribution of outputs, taking into account availabilities of cheap natural resources, labour, power and other infrastructures. Other modalities of cooperation should include joint production of components or subcontracting production parts and components, joint pioneering, joint purchase and sales promotion, inter-agencies appointment in each others countries, formation of inter-corporation councils in the subregion(say sugar council, cement council, steel and iron council, etc, exchange of directorship and purchase of nominal shares from each other, change the attitudes of national political and business leaders to realize the benefits of economic cooperation, use of study tours, and create socio-economic stabilities through democratization to gain the confidence of investors.

Both new and existing subregional industrial projects should be properly managed. Appointment of directors to the board and managers should be divorced from political consideration and nepotism. The objectives, functions, responsibilities and accountabilities of the organizations, and management should be clearly defined and performance contract based on profit with in-built reward or penalties should be introduced.

The critical shortage of financial resources for Second IDDA should also be met by internal sources with the introduction of proper and bold macro-economic reforms. These reforms should include rationalization of the fax system and improvement in revenue collection, reduction of expenditures, subsidies, improve the financial performance of parastatals, rationalization of prices and interest rates, depreciation charges, avoidance of over-valued foreign exchange rates, etc. and develop the local and subregional capital markets with the participation of financial intermediaries and commercial banks.

Other sources of finance include loans from local development and commercial banks, regional and subregional banks like ADB groups, BADEA, BOAD, ECOBANK, ECOWAS Fund, FODISEC, the East African Bank, PTA Bank, etc; multinational financial institutions like IBRD, EIB, Opec Fund, Nordic Investment Bank, the Islamic Development Bank and EDF; bilateral financial institutions like the Kuwait Fund, Saudi Fund, Abu Dabi Fund, CDC, KFW, FOM (Netherlands), CCCE (French), bilateral grants and technical assistance like the British ODA, NORAD, DANIDA, CIDA, SIDA, USAID, FINIDA, French Aid, Dutch AID, as well as export and suppliers credits.

Successful and sustainable national and subregional industrial development depends on the availabilities and development of human resources to design, establish and operate plants, formulate appropriate economic policies, manage enterprises, acquire inputs and market outputs, innovate investment and pioneer new production. Thus new commitments and efforts should be made to develop national entrepreneurial, managerial and technical/technological capabilities.

Annex 1.

Date of creation and composition of West African Intergovernmental Organizations

8 Organization		Date of Creation	Tot. No. of memb.	No. of Memb.from W/Africa	Members
A.	Multilateral IGOs whose members are exclusively from West Africa				
1.	Council of understanding	1959	5	5	Benin, Ivory Coast, Niger, Togo
2.	Organization for co-ordination and co-operation in the Fight Against Economic Disease (OCCGE)	1960	8	8	Benin, Ivory Coast, Mali, Mauritania, Niger, Senegal, Togo, Upper Volta.
3.	Central Bank of West African States (BCEAO)	1962	6	6	Benin, Ivory Coast, Niger, Senegal, Togo, Upper Volta.
4.	Authority for the Integrated Development of the Liptako-Gourma Region	1970	3	3	Mali, Niger, Upper Volta
5.	Economic Community for Livestock and Meat CEBV	1970	5	5	Benin, Ivory Coast, Niger, Togo, Upper Volta
6.	West African Rice Development Association (WARDA)	1970	14	14	Benin, Gambia, Guinea, Guinea Bissau, Ivory Coast, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Togo, Upper Volta
7.	Economic Community of West Africa (CEAO)	1972 (but dates back to the UDAO created in (1960)	6	6	Ivory Coast, Mali, Mauritania, Niger, Senegal, Upper Volta
8.	Organization for the development of the Senegal River (OMVG)	1972 (but dates back to the OERS)	3	3	Mali, Mauritania, Senegal
9.	West African Development Bank (BOAD)	1972	6	6	Benin, Ivory Coast, Niger, Senegal, Togo Upper Volta
10.	West African Health Community (WAHC)	1972	6	6	Gambia, Ghana, Guinea, Liberia, Nigeria, Sierra Leone
11.	Mano River Union (MRU)	1973	3	3	Guinea, Liberia, Sierra Leone
12.	West African Monetary Union (UMOA)	1973	6	6	Benin, Ivory Coast, Niger, Senegal, Togo, Upper Volta
13.	Economic Community of West African States (ECOWAS)	1975	16	16	Benin, Cape Verde, Gambia, Guinea, Ghana Guinea-Bissau, Ivory Coast, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Togo, Upper Volta
14.	West African Clearing House (1975)	1975	15	15	Central Banks of all six BCEAO countries, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Nigeria, Sierra Leone
15.	Organization for Development of the Gambia River (OMVG) Bilateral IGOS with members exclusively	1978	3	3	Gambia, Guinea, Senegal

	from West Africa				
16.	Benin and Niger Common Organization for Railways and Transport (OCBN)	1959	2	2	Benin and Niger
17.	Senegambia Permanent Secretariat	1967	2	2	Gambia and Senegal
18.	Electricity Community of Benin (CEB) with half or more of their members from West Africa	1970	2	2	Benin and Togo
19.	International Organization Against the African Migratory Locust (OICMA)	1952	17	11	Gambia, Ghana, Ivory Coast, Mali, Mauritania, Niger, Nigeria, Senegal, S/Leone, Togo, Upper Volta, Cameroon, Central African Republic, Chad, Congo, Uganda, Zaire
20.	Agency for Air Transport Security in Africa (ASECNA)	1959	14	8	Benin, Ivory Coast, Mali, Mauritania, Niger, Senegal, Togo Upper Volta, Cameroon, Central African Republic, Chad, Congo, Gabon, Madagascar
21.	Inter-State Committee for Water Studies (CIEH)	1960	12	8	Benin, Ivory Coast, Mali, Mauritania, Niger, Senegal, Togo,Upper Volta, Cameroon, Chad, Congo, Gabon
22.	Cocoa Producers Alliance	1962	7	4	Ghana, Ivory Coast, Nigeria, Togo, Brazil, Cameroon, Gabon
23.	African Groundnut Council (AGC)	1964	7	6	Gambia, Mali, Niger, Nigeria, Senegal, Upper Volta, Sudan
24.	Lake Chad Commission	1964	4	2	Niger, Nigeria, Cameroon, Chad
25.	Common Organization for the Fight Against Locust and Fowl Pests (OCLALAV)	1965	10	8	Benin, Gambia, Ivory Coast, Mali, Mauritania, Niger Senegal, Upper Volta Cameroon, Chad
26.	African and Mauritian Common Organization (OCAM)	1966 (but dates back to UAM created in 1961)	9	6	Benin, Ivory Coast, Niger, Senegal, Togo, Upper Volta, Central African Republic, Mauritius, Rwanda
27.	African Society for the Development of Millet and Sorghum-based Food (SADIAMIL)	1972	5	4	Mali, Mauritania, Niger, Upper Volta Sudan
28.	Inter-State Committee for the Fight Against Drought in the Sahel (CILSS)	1973	8	7	Cape Verde, Gambia, Mali, Mauritania, Niger, Senegal, Upper Volta, Chad
29.	Niger Basin Authority (NBA)	1980 (but goes back to the Niger Basin Commission Created in 1963)	8	7	Benin, Guinea, Ivory Mali, Niger, Nigeria, Upper Volta, Cameroon
D.	Multilateral IGOS with many members from West Africa and with their Headquarters in West Africa				
30.	African and Malagasy Council for Higher Education (CAMES)	1968	17	7	Benin, Ivory Coast, Mali, Niger, Senegal, Togo, Upper Volta, Burundi, Cameroon, Chad, Congo-Gabon, Madagascar,

					Mauritius, Rwanda, Zaire.
31.	African Solidarity Fund	1976	16	7	Benin, Ivory Coast, Mali, Niger, Senegal, Togo, Upper Volta, Burundi, Cameroon, Central African, Republic, Chad, France, Gabon, Mauritius, Rwanda, Zaire

Source: UNECA Proposals for Strengthening Economic Integration in West Africa (no date) pages 18-21.

Annex II

Benin

A. National Priority Projects for Rehabilitation with Subregional Cooperation

1. Edible Oil, Soap and Cosmetics (LA SONICOG)
2. Beverages (LA BENINOISE)
3. Sugar (Sociéte Sucriere de Save - SSS)
4. Cement (SCO, SONACI, SCB)
5. Textile industries (SITEX)
6. Extractive industries (Petrole de SEME)

Burkina Faso

A. National Priority Projects de Reconstruction et d' Extension

1. Filature tissage, impression (FASO FANI)
2. Production de carreau (SONACAB)
3. Egrennage du Coton (SOFITEX)
4. Impression Imprimerie (Imprimerie Nationale)
5. Production d' articles en céramique (Project Céramique)
6. Production de briques cuites (SONABRIB)
7. Production d' articles en cuir, chaussures, sacs (SINAC)
8. Production d' articles métalliques et pieces de charges (AMK)
9. Production de cur semi-fini (SBMC)
10. Production de munitin, assemblage de fusils, const. villas (SIBAM)
11. Production de sucre (SOSUCO)

B. Projects Nouveaus

1. Unité de traitement de fruits et légumes
2. Unité de production de pâtes alimentaires et de couscous.
3. 2 Abattoirs frigorifiques de volailles.
4. Unité de transformation de tubercules.
5. Malterie
6. Unité de fabrication de médicaments essentiels.
7. Unité de production de levure de boulangerie
8. Petite fonderie de fer
9. Transformation Artisanale du Karité, Sésame et de l' arachide.

10. Amélioration de l' emballage des produits de la SAVANA
11. Conditionnement de produits maraîchers.
12. Transformation de l' arachide.
13. Déshydratation des fruits.
14. Transformation artisanale des fruits et légumes.

Cape Verde

National Priority Projects for Reconstruction and Expansions

1. Fishery and fish processing industries
2. Medicaments - Pharmaceutical (EPROFAC)
3. Food industries - (MOAVE)
4. Beverages (CERIS)
5. Glass (MAC-SOBIL)
6. Paints (SITA)
7. Repair and maintenance - mechanical workshop (SONACOR)
8. Garment industries (MORABEZA)
9. Naval and ship repair yards (ONAVE-CABNAVE)
10. Metal food containers/can (FAMA)

Côte d' Ivoire

National Priority Projects for Restructuring and Expansion

A. Premiere Prioritaires

1. Fruits et légumes
2. Ceréales
3. Capé et cacao
4. Huiles
5. Feculents
6. Coton
7. Bois
8. Pétrole - gaz et autres sabstance minierés
9. Products pharmaceutiques
10. Caoutchouc (rubber)
11. Biens d' equipement
12. Emballages

B. Les Autres Filierès

13. Le sucre

14. Tabac
15. Preparations alimentaires
16. Le Viande
17. Les poissons
18. La troisieme transformation du bois
19. Papier
20. Chimie agricole
21. Plastiques
22. Premiere transformation de l' acier
23. Montage et sous-traitance des equipements mechaniques, electriques et electroniques
24. Maintenance et reparation
25. Materiel et untils agricoles

The Gambia

A. National Priority Projects for Rehabilitation through subregional cooperation

1. Fruit juice - cooperation for markets and raw materials
2. Laundry and toilet soap - cooperation for markets
3. Tannery - cooperation for markets and raw materials
4. Beef packing - cooperation for market and finance

B. New priority Projects through - cooperation with foreign investors

1. Exploration and processing beach stand - market and finance
2. Manufacture of glass products - market and finance
3. Fruit processing plant - market and finance
4. Biscuit manufacture - market and finance

Ghana

A. National Priority Projects for Rehabilitation and Expansion through subregional cooperation

1. Manganese Mine and Commissioning of Manganese Modulaion plant.
2. 12 forestry projects, 10 of which are on-going and 2 new ones including wood processing and furniture industries.
3. Volta River Authority (VRA) hydro-electric power.
4. Tyre and rubber (Bonsa)
5. Pharmaceutical (GIHOC)

6. Glass
7. Iron and Steel
8. Gold Mine
9. Ghaip Oil Refinery Rehabilitation Phase II
10. Foundry
11. Fishery and fish processing industries including boat yards.
12. Agricultural machinery, tools, equipment, spare parts, and components
13. Aluminum products
14. Fruits and vegetable processing
15. Salt producing industries (three firms)
16. Flour Mills
17. Oil Mills
18. Animal feed plant
19. Kool Bottling factory
20. Nsawan Cannery
21. Nicom Chemical and Paint Factory
22. Fluorescent Tube Factory
23. Tema Wood Complex

Guinea

A. Réhabilitation Projects

1. Société Guineénne d' industrie pharmacentique (SOGIP)
2. Usine des Meubles de Sonfonia
3. Huilerie Sincery de Dabola
4. Briqueterie de Kankan
5. Usine de jus de fruit de Kankan
6. Sine de Quinine de Sérédou
7. Usine de Sciages, et de contre-plaqués de Nizérékoré (USCZ)
8. Maintenance preventive et production locale de piéces cecharge, fabrication d' outillages et petitquipement, etc.

B. Noveaux Investments (Projects)

1. Implantation et exploitation d' une unité de pêche industrielle á Conakry
2. Usine d' Articles de Ménages en tôles émaillées
3. Fondérie modulaire au Centre Pilote
4. Savonnerie Nationale
5. Briquerie de Boké et de Labé
6. Fabrication de pate d' arachid (IPAKO)
7. Production et Commercialization de Papaine
8. Mini-Cimenterie de Siguiri

9. Création Usine de Bougies
10. Extention de la Savonnerie Huilerie de Macenta
11. Fabrication d' Aliment de Volailles et Betail á Labé
12. Fabrication de Craie Soolaire â Kankan
13. Reprise et Rehabilitation usine existante Huilerie Mixte (coton-arachide)
14. Unité de Fabrication de Clous à Fria
15. Implantation et Exploitation d' une Enterprise de construct et Rectification de piéces Mécanique et Electricité Industrielle
16. Ferme D' élévage de Crevettes
17. Huillerie Semi-Artisanale
18. Atelier de Construotion Métallique
19. MINI-Fonderie
20. Céréales-GUINEE
21. Production de Papaine lyophilisée titrant 2600 activités prothéoliques Kg
22. Pompes hydraulique villageois
23. Fer á beton et toles noires
24. Verrerie de Wassou
25. Cimenterie Sougueta

Guinea Bissau

National Projects Promoted for Joint Ventures

1. Unité metallo-mecanique légére
2. Unité de rechapage de pneus
3. Unité de transformation du papier et industrie graphique
4. Unité d' extraction de huile de palme et palmiste
5. Usine de Jus et fruit
6. Unité agro-industriel pour transformation de products horticoles
7. Unité de production d' huiles alimentaires et Savon
8. Unité de construction de bateaux de pêche, pêche et industrisation du poisson
9. Unité industries de transformation de bois
10. Fabrique de mosaiques
11. Céramique pour la construction civil

Liberia

National Industries Meriting Rehabilitation

1. Parker Industries Ltd (production of paint and tin containers)

2. Liberia Glue and Latex Foam Industries Ltd
3. Liberia Polyvinyl Industries Ltd
4. Mesurado Oxygen Supply Co.
5. M.I.C. Furniture Manufactures
6. Mondalco-Moses L-Davis and Co.Ltd (food processing)
7. Lifaico - Liberia Food and Agriculture Industrial Corporation
8. Mezbau Manufacturers (electrodes, roofing sheets, etc)
9. Liberian steel products corporation
10. Metalloplastica (Liberia) Ltd. (Plastic Products)
11. Liplafco-Liberia Plastic Footwear Corporation

Mali

Réhabilitation Projects Nationaux

1. Secteur des cuirs et peaux (Tannerie du Mali et Tannerie Providence Malienne)
2. Compagnie Malienne du Developpement du Textile
3. Compagnie Malienne du Textile
4. Operation Haute Vallée
5. Industrie Textile du Mali
6. Operation de Développement Intégré des products arachidiers et céréaliers
7. L'usine ceramique du Mali
8. Systeme de maintenance industrielle
9. Foundrie
10. Ceramique
11. Ciments
12. Usine de Tabac

B. Nouveaux Projets Nationaux

1. Le systéme "Céréale"
2. Le systéme "cultures industrielles et corps gras"
3. Le systéme "produits animaux"
4. Le systéme "fruits et légumes"
5. Sucriere de Bankoumana
6. Reconstruction de l' Unité de broyage de phosphate Tilemsi
7. Fabrique de basin
8. Production Alohol Biomasse
9. Sechoir-Silo Pour Cereale a Ventilation Solaire
10. Centre hydro-electrique de Manantoli OMVS ligne transport energy
11. Usine de Pierres a Lecher

Mauritania

Les Projects Nationaux Integrables al' Action Sous-regionale

1. La réhabilitation de SAMIA, unité de production de plâtre
2. La projet de pelletization de minerais de fer
3. La rehabilitation de la Raffinerie de pétrole
4. Le developpement des activities de l' Aciérie SAFA
5. Le project de conserverie de poisson
6. Le developpement de la filiere egrais, phosphates

Niger

A. National Priority Projects for Rehabilitation

SONITEXTIL
IMPRIMERIE NATIONALE
BRIMAR
POLYNIGER
SOTRAMIL
SNC
SONIA
SONITAN
LABOCEL
RINI
GNPPC (Unité de compression)

B. Projets Industriels Nationaux Nouveaus

1. Usine de Pierres â lécher
2. Eau minérale
3. Manufacture de cigarettes
4. Creation d'un nouvel abattoir figorifique
5. Creation d'une tannerie
6. Déshydration d'Oignons
7. Saline de Tidekelt
8. Engrais phosphaté
9. Travail de la corne
10. Usine de carbonisation de charbon mineral
11. Le project d' un institut de médicine et de pharmacopée traditionnelles
12. Projet d' equipement pour mise et tube de pommades â usage externe

Senegal

A. Programme de consolidation et de Maintenance

1. Projet de Fonderie au Senégal
2. Société Industrielle de Transformation des Fruits et Légumes Locaux (SITRAF - SA)
3. Fabrique d' Outils et Pieces de recharge

B. Projets Industrielles Mouveaux

1. Projet de creation d' une Société Industrielle de Céreales (SIC)
2. Projet de Création d' un unité de Transformation de kinkélibah et autres plantes assimilées au Sénégal
3. Project agro-industriel de production et de conservation de fruits el legumes parionisation et lynophilisation
4. Projet de création d' une unité de fabrication de coton hydrophile et bandes de pansement au Sénégal
5. Valarisation des cuirs et peaux
6. Projet de valorization des molasses pour fabrication de levure de panification.
7. Fabrication de carton a partir de Dechets et de Papier Recyclés
8. Fabrication de pompes d' irrigation
9. Fabrication de modules photovotaiques
10. Production de pylones electriques et produits galvanisés (revêtements)
11. Tracteurs á Quatre Roues

Sierra Leone

A. National Priority Projects for Rehabilitation

1. Aural Tobacco Company
2. Wellington Distrilleries
3. Sierra Leone Breweries
4. Oil Refinery
5. The Integrated Fish Meal Company
6. Sierra Leone Investment Company (Men's Outter wear)
7. Suen Solar Salt processing
8. Osman Thomas and Sons (Matresses)
9. Lewis Building Stone Unit
10. Sierra Leone Knitting Factory
11. Mabole Fruit Canning Factory

B. New Projects with subregional Cooperation

1. Food processing
2. Agro-related Chemicals
3. Agricultural Implements
4. Building and Construction Materials
5. Wood Processing
6. Telecommunications equipment and materials
7. Petro-Chemicals
8. Pharmaceuticals
9. Iron & Steel
10. Automobiles and related industries
11. Caustic Soda
12. Plastic Products

C. Mano River Union Projects

1. Hydro-electric power
2. Mobile Mini Palam Oil Mills
3. Livestock Development

D. New National Projects with Private foreign Investors

1. Sugar Cane Cultivation 4 Sugar Refinery
2. Pulp and Paper
3. Fruit & Vegetable growing & processing
4. Growing and processing Fibre (urea lobata)

Togo

A. National Projects for Relabilitation with subregional cooperation

1. Iron and Steel
2. Ceramiques (floor and wall ceramique, roof and wall bricks) - SOTOMA
3. Marble Factory
4. Cement Factory

B. National New Projects with subregional cooperation

1. Agro-industries and food processing
2. Metals and Metal Fabrication
3. Packing Materials
4. Motors, Mechanical Engineering and Spare Parts
5. Recycling industrial wastes
6. Phosphate fertilizers
7. Edible Oil
8. Fishery and Fish processing

Annex 3

LIST OF SUBREGIONAL PROJECTS FOR: WEST AFRICA

Projects

Metallurgical industry

Iron and steel subprogramme.

1. Establishment of a sponge iron plant (long term).
2. Installation of electric arc furnace plants in the subregion (long term).
3. Installation and expansion of re-rolling mills in the subregion (long term).
4. Establishment of an integrated iron and steel plant for flat and tubular products (long term).
5. Exploitation of the Nimba mountains, Guinea and Liberia (short term).

Non-ferrous metals subprogramme.

6. Processing of bauxite and alumina, Ghana (medium term).

Engineering industry

Agricultural machinery and equipment subprogramme.

7. Manufacture of agricultural tools and implements, Sierra Leone (short term).
8. Manufacture of agricultural implements and equipment, Nigeria (long term).
9. Production of mobile mini palm-oil mills, Mano River Union (short term).
10. Manufacture of four-wheeled tractors, Senegal (medium term).
11. Manufacture of diesel engines for irrigation pumps and generators, Guinea (medium term).
12. Manufacture of irrigation pumps, Senegal (medium term).

Road and rail transport equipment subprogramme.

13. Manufacture of railway wagons, Burkina Faso with a subsidiary plant in Senegal (medium term).
14. Establishment of a central press workshop, Oshogbo, Nigeria (short term).
15. Manufacture of diesel-engines for tractors, trucks, lorries and buses, Nigeria (long term).
16. Manufacture of diesel engine-mounted chassis for lorries, trucks, and buses, Nigeria (short term).

Energy equipement.

17. Manufacture of hurricane lamps, Senegal (short term).
18. Manufacture of aluminum conductors and cables, Ghana (long term).
19. Manufacture of steel towers, Nigeria (long term).

Chemical industries

Fertilizer subprogramme.

20. Establishment of a phosphoric acid plant, Togo (short term).
21. Subregional ammonia and urea project, Côte d'Ivoire (long term).
22. Establishment of a subregional phosphate fertilizer industry, Liptako-Gourma (short term).
23. Extension and rehabilitation of the phosphoric acid and fertilizer plants, Senegal (short term).

Pharmaceutical subprogramme.

24. Reactivation of the Matoto pharmaceutical plant, Guinea (short term).
25. Rehabilitation of the Seredu station, Guinea (short term).
26. Establishment of a pharmaceutical plant, Nigeria (short term).

Basic chemical subprogramme.

27. Tidekelt salt project, Niger (short term).
28. Expansion of salt/soda production plant, Mano River Union (short term).

Agro-and agro-based industries.

Food-processing subprogramme.

29. Integrated complex for poultry production, Liberia (short term).
30. Plants for the industrial processing of millet and sorghum, Niger and Nigeria (short term).
31. Manufacture of village mills for millet and sorghum, Niger and Nigeria (short term).
32. Food-processing plant, Guinea (short term).
33. Rehabilitation and expansion of Mamou agro-industrial company (SAIG), Guinea (short term).
34. Establishment of a plant for processing kinkelibah and other similar plants, Senegal (short term).

35. Exo-pulp (frozen fruit), Guinea (medium term).

Forest industries subprogramme

36. Establishment of pulp and paperboard factory, Côte d'Ivoire (medium term)
37. Manufacture of cotton wool, dressings and sanitary products, Senegal (short term)
38. Promotion of pulp and paper industry in MRU, Sierra Leone (medium term)

Building materials industry

Cement and ceramics subprogramme

39. Establishment of a subregional cement factory in the Liptako-Gourma region (short term)
40. Establishment of a ceramics factory, Togo (short term)

Non-metallic mineral products subprogramme

41. Manufacture of glass containers, Liberia (short term)
42. Manufacture of glass containers, CEAO member States (medium term)
43. Wassou glasswork, Guinea (long term).

Sources : ECA/UNIDO DRAFT PROGRAMME FOR THE SECOND IDDA, (1991-2000), Self-sustainment through industrialization, Volume two, The subregional and regional programmes. CAMI.10/6/Vol.2 ICE/1991/6Vol.2 Annex 4. Page 1 & 2

Annex 4

Criteria for selecting multinational/ subregional industrial core projects

For an industrial project to qualify as a multinational/subregional core project, it should meet all basic requirements in group I and one or more additional requirements in group II.

I. Basic requirements

The project:

(a) provides inputs into the priority sectors selected in the Lagos Plan of Action and the Final Act of Lagos, i.e. food, transport and communications and energy;

(b) provides effective integration and linkages with other industrial and economic activities and infrastructures in the subregion;

(c) utilizes and upgrades, to the maximum extent possible, African natural resources (raw materials and energy) so as to benefit first the subregion, secondly other African countries and thirdly non-African countries;

(d) produces intermediates for further procession or fabricating in an increasing number of established or planned industries or engineering goods, particularly those related to food production and mining;

(e) caters, first and foremost, directly or indirectly, to the basic needs of the people in the subregion and, if required, in other African countries;

(f) involves (i) economies of scale, (ii) complex technology or upgrading of technology, (iii) large investment and (iv) market(s) beyond the reach of individual countries in the subregion;

(g) offers scope for co-operation, especially among the African countries, in long-term supply/purchase arrangements for raw materials, intermediates and final products; subcontracting; barter, equity share holding; etc.

(h) contributes to reducing the region's heavy reliance on external factor inputs.

II. Additional requirements

The project:

(a) offers comparative advantage(s) over similar projects(s) - actual or potential - in other groups of countries (African and non-African), particularly in respect of raw materials, energy and the infrastructure required;

(b) complements related project(s) on existing production unit(s) in the subregion;

(c) earns foreign exchange through the export of its products, including upgrading of raw materials;

(d) results in rehabilitation and rationalization of existing production unit(s);

(e) replaces, whenever practical synthetic materials by natural materials, particularly those that are ennoble.

Sources: ECA/OAU/UNIDO INITIAL INTEGRATED INDUSTRIAL PROMOTION PROGRAMME FOR THE WEST AFRICAN SUBREGION. ID/WG.409/3/Rev.1, 14 Feb. 1984 pages 89-90.

Annex 5

LIST OF OFFICIALS MET

1. Mr. Steven Vrsino, Officer-in-Charge and Deputy Resident Representative UNDP, Lome, Togo

2. Mr. Amadou Mandou, Senior Economist UNDP, Lome, Togo

3. Mr. Cyriaque R-Sobtafo Nguefack, Assistant Director UNIDO, Lome office, Lome, Togo

4. Mr. Alain Tirard, Chief Technical Advisor UNIDO, Lome, Togo

5. Mr. Kodjo A. Adokou, Team Leader for Group of Auditors Appointed to Liquidate CIMAO and Associate Technical Director Cabinet Efogeric Audit Togo, Lome, Togo.

6. Mr. Rizwan Haider, Group Managing Director ECOBANK, Lome, Togo

7. Mr. Olayemki Akapo, Assistant Director Credit and Marketing ECOBANK, Lome, Togo

8. Mr. L. Boukari, Director of Industry Government of Togo, Lome, Togo

9. Mr. Yao Messan Aho National Director BCEAO Lome, Togo

10. Mr. John T. Woods, Project Economist ECOWAS Fund, Lome, Togo.

11. Mr. Kossi Konou, Technical Advisor to the Minister of State Enterprises in Industries Lome, Togo

12. Mr. Kolassiba Abala-Toki Na, Director of Economic Research and Prospectives (REP), Lome Togo

13. Mr. Koffi Kouassi, Director of Institutional Financiers and Industries BOAD, Lome, Togo

14. Mr. Gossé Robert, Economist BOAD, Lome, Togo

15. Mr. Ouedar, Chief of Industry Division Liptako-Gourma Authority, Ougadougou, Burkina Faso

16. Mr. Nathanail Bony, Chief Division of Promotion of Industries CEAO, Ougadougou, Burkina Faso

17. Mr. Koffi, Coordinator of the Railway Wagon Production Project CEAO, Ougadougou, Burkina Faso

18. Madame Narco, Chief Finance and Audit Officer CEAO/FODISEC, Ougadougou, Burkina Faso

19. Mr. Banhoro Director Cabinet du Industries Government of Burkina Faso, Ougadougou, Burkina Faso

20. Madame safyaton, Industrial Officer Cabinet du Industries, Government of Burkina Faso Ougadougou

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22. Mr. Apetey, Director of Infrastructure and Indudstry Eastern and Southern African Region ADB, Abidjan, Côte d' Ivoire

23. Mr. Bisi Ogunjobi, Director Country Programme Northern Region ADB, Abidjan, Côte d' Ivoire

24. Mr. Souleymane Sow, Deputy Director Infrastructure and Industry Department Northern African Region ADB, Abidjan, Côte d' Ivoire

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26. Mr. Anusionwu, Senior Economist Country Programme Department, Northern African Region ADB Abidjan, Côte d' Ivoire

27. Mr. Alassane Ba, Industrial Economist Infrastructure and Industry Department, North Africa Region ADB, Abidjan, Côte d' Ivoire

28. Dr. Kheshen- Senior Economist, Regional Integration Division ADB, Abidjan, Côte d' Ivoire

29. Mr. David Akroyd, Principal Agricultural Economist Operation and Evaluation Division ADB, Abidjan, Côte d' Ivoire

30. Mr. Limane Barage, Chief Industry Division ECOWAS, Lagos, Nigeria

31. Mr. David Tommy, UNIDO Country Representative Lagos, Nigeria

Annex 6

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