

**Evaluation of
International Trade Centre
(UNCTAD/WTO)**

**Volume 4
Product Studies**

**SOUTH-SOUTH
TRADE
PROMOTION**

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List of Acronyms

APNET	African Publishers Network
ASEAN	Association of South East Asian Nations
BSM	Buyer-Seller Meeting
ECO	Economic Co-operation Organisation
ECOWAS	Economic Community of West African States
EPC	Export Promotion Council
FAO	Food and Agriculture Organisation
FDI	Foreign Direct Investment
ITC	International Trade Centre
LDCs	Least Developed Countries
NGO	Non-Governmental Organisation
OEM	Original Equipment Manufacturer
PABA	Pan-African Booksellers Association
SADC	Southern African Development Community
SME	Small or Medium-sized Enterprise
SSTP	South-South Trade Promotion
TISA	Trade and Investment South Africa
TNCs	Transnational Corporations
TPO	Trade Promotion Organisation
TSI	Trade Support Institution
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organisation
USD	United States of America Dollar
WFP	World Food Programme
WTO	World Trade Organisation
ZIBF	Zimbabwe International Book Fair

1. South-South Trade Promotion Programme

1.1 Programme Objectives, Rationale and Activities

The South-South Trade Promotion (SSTP) promotes intra-regional trade and sub-regional trade, especially in Africa, which has the lowest intra-regional trade trends among all geographical regions in the world. It had a budget of USD 1.36 million for the first and USD 2.1 million for the second phase. Its potential scope was nearly 100 countries and nine geographical regions, including trade groupings¹. It has enlarged its scope to cover inter-regional trade promotion such as Africa-Asia and Africa-Latin America. It also seeks to introduce new dimensions related to trade enhancement, such as investment linkages, rationalisation of industries and regional value addition across the value chain. In the past 10 years, the International Trade Centre (ITC) has handled more than 50 Buyer-Seller Meetings (BMS) in more than 20 sectors in nine regions.

This Evaluation seeks to establish whether there has been successful transfer of skills and capabilities to local Trade Support Institutions (TSIs).

The Programme objectives are: to enhance market opportunities among developing countries on an intra- or inter- regional basis; to facilitate trade and business linkages among enterprises of developing countries; to enhance export readiness/competitiveness of enterprises; and to enhance institutional capacities of TSIs to improve trade support services delivery.

The programme addresses the problem of low share of intra regional trade in the trade flows of developing countries, despite the potential for such trade in a number of products. It seeks to do so by providing adequate trade information, establishing the trade potential through trade flow analyses, selecting promising products/sectors based on demand and supply studies, and organising interactions among potential exporters and importers with the support of TSIs from the partnering countries under each theme.

The SSTP is a transaction-focused programme, the centrepiece of which involves BMSs, but with an important difference from typical events arranged by trade missions. The SSTP meetings are preceded by an elaborate preparatory phase involving all the participant countries, including assessments of intra-trade potential based on trade flow analysis using the ITC database, identification of product/sector themes for the event based on confirmed demand/supply potential established through surveys in all participating countries, and finally the targeting of participants through a prequalification process to ensure the highest probability of business consummation at the events.

The Programme format consists of the following eight stages: identification of import/export opportunities through trade flow analyses; product selection workshops; preparatory training seminars for partnering TSIs; documentation of product/sector

¹ Such as ASEAN/South Asia, Interstate Council, Economic Co-operation Organisation (ECO), Central America, Economic Community of West African States (ECOWAS), Mercosur (Argentina, Brazil, Paraguay and Uruguay) and the Andean Community (Bolivia, Peru, Ecuador, Columbia and Venezuela).

specific supply and demand characteristics in countries having complementary trading interests; enterprise audits for selecting participants to buyer-seller events; dissemination of the information to institutions and enterprises for transformation into trade transactions through BMSs; buyer-seller events, including tailor made seminars; and follow up activities.

The management of the Buyer-Seller events uses ITC's specialised matchmaking software to obtain the maximum number of meetings for participants with suitably matched suppliers/buyers. The meetings are preceded by presentations covering important themes of relevance to the event; and also highlighting regulatory and capacity constraints to trade in the selected product groups.

ITC has established the following specific deliverables under the SSTP: data sets providing quantitative and qualitative information on trading opportunities among developing countries, in a regional and occasionally interregional perspective; tailor-made methodologies and customised tools for south-south trade development; new trade flows and trade-related business arrangements, among developing countries; and specific strategies and programmes for the expansion of south-south trade, for eventual implementation with or without ITC assistance.

Table 1: ITC Work Programme under South-South Trade Promotion (Phase II)

Description of Outputs	Description of Activities
An inventory of trade and investment opportunities for a number of developing regions and sub-regions, as well as an analysis of investment and trade potential between developing regions.	Undertake and widely disseminate trade flow analyses. Use as inputs for programme activities to expand trade and encourage investment.
A series of supply and demand surveys on specific product sectors providing detailed commercial and enterprise information on complementarities.	Subcontract the undertaking of supply and demand surveys to national TSIs or consultants. Widely disseminate at buyers-sellers meetings.
Development and introduction of tailor-made methodologies and customised tools in regions for transforming the identified opportunities into business arrangements.	Formulate a multi-disciplinary approach to deliver appropriate solutions in a holistic manner. Regional Economic Groupings to be closely involved as stakeholders.
Training staff of regional and national TSIs in the use of the tools and methodologies developed.	Organise methodology and training workshops for the benefit of staff from regional and national TSIs.
Establishing business arrangements and expand trade-investment linkages as a result of buyers-sellers meetings on selected products.	Organise buyers-sellers meetings with the participation of at least 250 enterprises, provide overall management assistance for the events, external guidance in the initiation of business negotiations and identify obstacles to trade expansion.

Description of Outputs	Description of Activities
Proposals for specific south-south trade and investment promotion strategies, institutional and sectoral.	<ul style="list-style-type: none"> • Identify product groups that can contribute to poverty reduction and creation of sustainable livelihoods. • Formulate proposals for further utilisation of e-applications in south-south market prospecting. • Provide business advisory assistance to enterprises engaged in south-south trade. • Publish and disseminate “best practice” models to encourage successful south-south trade and investment development approaches.

Source: ITC project documentation on SSTP provided by ITC.

Past and present Interventions

The SSTP Program was launched as a global programme of the ITC, United Nations Conference on Trade and Development (UNCTAD)/ World Trade Organisation (WTO) in 1999. It was funded under Window II of ITC’s Global Trust Fund. Its theme and format originate in earlier interventions undertaken by ITC in Africa (Tables 4 and 5).²

Table 2: South-South Trade Promotion 1999–2001

Title	South-South Trade Promotion
Duration	3 Years
Starting Date	1999
Co-operating Organisations	Intergovernmental organisations, national and regional business entities
Budget	USD 1,326,000

Table 3: South-South Trade Promotion 2002–2004

Title	South-South Trade Promotion
Duration	3 Years
Starting Date	2002
Co-operating Organisations	Intergovernmental organisations, national and regional business entities
Budget	USD 2,100,000

² Specifically the Intra-African Trade Promotion Project (IATP), funded by the government of Netherlands in the tune of USD 1.05 million, operated from 1992 to 2000, and the Sub-regional Trade Expansion in Southern Africa Project (STEP), funded by the Swiss government the amount of USD 1.36 million, and operated from 1999 to 2001. Together, the two projects covered 30 countries in Africa under the umbrella of various sub regional groupings.

Table 4: Intra African Trade Promotion

Title	Intra African Trade Promotion
Duration	8 years
Starting Date	1992
Co-operating Organisations	Netherlands
Budget	USD 1,048,000

Table 5: Sub-regional Trade Expansion in Southern Africa

Title	Sub-regional Trade Expansion in Southern Africa
Duration	3 Years
Starting Date	1999
Co-operating Organisations	Switzerland
Budget	USD 1,362,000

Future Direction³

While retaining a focus on generating new trade flows among developing and transition economies, the programme also seeks to build linkages with themes such as investment promotion, poverty reduction, capacity development of enterprises, trade strategy formulation, and co-ordination with other development assistance agencies.

Typical linkages between the SSTP and the themes under consideration are:

Investment, Rationalisation and Regional Value Addition

Trade flow analyses reveal opportunities for investment, rationalisation of industry/enterprise structure through value chain analyses, and creation of regional hubs of excellence in sectors. Given the improved features incorporated in the analyses, these opportunities are highlighted.

Poverty Reduction.

Identifying products that impact on poverty reduction and result in better market realisation will ensure sustainable livelihoods for the producers. Creating regional hubs for artisanal products, for example, will result in greater market presence and prospects for the producers.

Enterprise-level Assistance.

Providing advisory assistance to enterprises in key functional areas (e.g. quality management or packaging) to help transform them into more knowledgeable and competitive entities.

³ Source: ITC project documentation on SSTP

Enhanced use of Information Technology.

Innovative use of delivering substantive and commercial information to stakeholders - e.g. distance learning methods or Internet based market places - for efficient dissemination of content and reduced transaction costs.

Improving Growth Potential for Least Developed Countries

Identification of products available, under competitive conditions, in the smaller countries, for which there is substantial import demand in the larger markets.

Strategy Formulation and Follow-up.

The strategy formulation involves identification of obstacles to trade, and identification of subsequent follow-up measures aimed at removing those obstacles. This will involve the participation of the policy and regulatory domains across countries in the region, such as the secretariats of Regional Economic Groupings. The scope and design of this phase aims in particular at providing “bottom-up” impulses for the creation of regional trade promotion infrastructures.

Service Co-ordination.

Integration of the product-networks and tools available from other ITC services, and the various ITC initiatives related to the Doha Development Agenda; follow-up and exploring synergies with relevant WTO, World Health Organisation, Multilateral Investment Guarantee Agency, UNCTAD and United Nations Industrial Development Organisation (UNIDO) programmes, notably in the area of investment promotion and rationalisation of industry.

Budget

The first phase of the SSTP programme had a budget of USD 1.33 million, which has been enlarged to USD 2.1 million in the second (current) phase, with the following break up among allocations as shown in Table 6:

Table 6: Budget of the South-South Trade Promotion Programme

	2002-03	2003-04	2004-05	Total
Project personnel (including evaluation)	430,869	430,869	430,869	1,292,607
Subcontracts	70,625	70,625	70,625	211,875
Training	113,000	113,000	113,000	339,000
Equipment	22,600	22,600	22,600	67,800
Miscellaneous	62,906	62,906	62,906	188,718
Total	700,000	700,000	700,000	2,100,000

Source: ITC project documentation on SSTP.

It can be seen that the biggest share of the programme costs goes into allocations for full time and consulting staff from various divisions in ITC headquarters for preparation of trade flows, demand and supply analyses and other support to programme events. The

second biggest allocation goes into training, of persons from TSIs, to be able to develop capacities to administer the programme with the aim of reducing dependence on ITC.

1.2 Methodology

This evaluation of the SSTP programme is based on desk studies of ITC project documents; discussions with ITC staff; an e-mail questionnaire survey⁴ of participants at various BMSs held under the Intra-Africa Trade Promotion Programme, the Sub-Regional Trade Expansion Programme and the Buying from Africa for Africa programme, between 1999 and 2003; and field visits to South Africa, Kenya and Tanzania; and discussions with national counterparts, local stakeholders and a few participants/beneficiaries on the above programmes.

A detailed analysis has been attempted for three projects covering practically the entire gamut of SSTP activities in Africa, and four sectors in each, of which at least five BMSs have been held in Africa. The projects are:

- A. The Intra African Trade Promotion Programme;
- B. Sub-Regional Trade Expansion in Southern Africa;
- C. Buying from Africa for Africa (Humanitarian aid supplies - a theme under the new SSTP global programme).

Also, the SSTP covers a broad spectrum of product themes, of which some have seen several BMSs over the duration of the programme. For the SSTP evaluation, four such sectors, in each of which at least five BMSs have been held in all; and at least three BMSs have been held covering the sampled countries, have been taken up for assessments of outcomes and impacts. These sectors are: printing and publishing; food and beverages; leather products; household, shelter and protection goods (humanitarian aid).

Field observations were undertaken in three countries that were part of the Intra African Trade Promotion and Southern African Trade projects, i.e., Kenya, Tanzania and South Africa. South Africa was studied only for the purposes of this programme.

Besides the above detailed studies, reviews of SSTP projects in other regions were carried out through desk studies and interviews with ITC staff associated with these projects, with a view to observing factors that may have enabled experiences and outcomes different from the earlier programmes; and to understanding how ITC has adapted the programme based on lessons learned in Africa.

⁴ Sample questionnaires are appended to the report in the Annexes, the list of participants was provided by ITC.

1.3 Findings

Mission Observations

Intra African Trade Promotion Programme

The Evaluation met with the Trade Promotion Organisation (TPO), participating TSIs, ITC's national consultants in South Africa and Kenya, and a few participants in some buyer-seller events, to obtain relevant feedback on the programme. Additionally, e-mail questionnaires were sent to 67 entities associated with the events in humanitarian supplies. The responses to the e-mail survey were dismal, as several mails bounced, and only 10 responses were received. However, the Evaluation could meet with some important stakeholders and got a good first hand insight into the experiences and results from the events.

Sub-Regional Trade Expansion in Southern Africa

The Evaluation met with the TPO, participating TSIs, ITC's national consultants in South Africa, and a few participants in some buyer-seller events, to obtain relevant feedback on the programme. Additionally, e-mail questionnaires were sent to 101 entities associated with the events in textiles/clothing and exotic food and beverages in which trade opportunities were considered to be more than in the other sectors. There were only 9 responses to the email questionnaire and 25 mails bounced.

Buying from Africa for Africa

In Kenya, the Export Promotion Council (EPC) was the national counterpart institution for the project. Under the project, officials of the EPC were exposed to the ITC SSTP methodology and the three steps involved.

For the first event, EPC developed a database of buyer agencies located in Kenya.

Many buying agencies had procurement offices in Kenya, managing requirements for the East African market. However, there was no mention of having co-ordinated any work of national consultants in identifying suppliers or producing supply surveys.

There were not many suppliers to the aid business, and many suppliers that attended the BMSs had already been introduced to some buying agencies. As a result, there was practically no demand for information about the event or requests for support to prepare dossiers. As to monitoring outcomes from the events, EPC stated that follow-ups are always ineffective because suppliers do not want to disclose details of business concluded at the events.

On the whole, the Evaluation noted a lack of enthusiasm and interest in the SSTP intervention, contradicting the fact that Kenya was proactive in hosting a second meeting on this theme in 2003, without any support from ITC. The only positive outcome for the EPC has been stated as the transfer of skills in organising buyer-seller events without ITC assistance, as shown in their independent handling of the second meeting in 2003.

The Evaluation has provided rankings on a 4-point Likert Scale⁵, for the five headings of relevance, efficiency, effectiveness, impact and sustainability, based on the qualitative assessments reached in the evaluation. It is clarified that the respondents themselves did not directly provide these rankings. This is explained by the following: *There are several stakeholders for most projects. Not all stakeholders agree to the same assessments, and all highlight their prominent impressions of the experiences.* This numerical rating by the Evaluation has been done for the purposes of overall aggregation covering all country studies and technical studies undertaken under this evaluation.

End User Surveys

As part of the evaluation of the SSTP Programme as a technical study, the Evaluation sent simple questionnaires to 26 aid organisations and 27⁶ suppliers from Kenya that were mentioned as participants in a list given by ITC - the EPC could not furnish this list when sought by the Evaluation.

Of the 53 respondents, eight mails bounced, and only one buyer and six sellers answered. Two reasons for the poor response could be the deletion of the mails by spam mail filters, or lack of inclination.

The summaries of responses to the questionnaire have been tabulated below.

Table 7: Summary of Responses to E-questionnaire, Buying from Africa for Africa

Perception of the utility of the Buyer Seller Programme	Scores on scale 1 (none) to 4 (significant) of seven responses
Increase in business	1,3,1,3,3,2,2; average 2.1
Introduction of new suppliers/buyers	2,3,2,2,2,2,2; average 2.1
Useful information on buying procedures	1,3,3,2,4,2,2; average 2.4
Quality of supply and demand surveys	1,3,4,2,4,3,2; average 2.7
Awareness raising of problems, bottlenecks	1,3,3,2,4,2,1; average 2.2
Overall	2,3,3,2,4,2,2; average 2.5

Only one procurement organisation responded to the questionnaire. Even the United Nations Development Programme (UNDP) office in Kenya, which maintains data on the procurements by United Nations (UN) bodies in the region, could not provide any information on procurement under the 'Buying from Africa for Africa' programme, and the officer concerned was not well aware of the project.

The Evaluation also interviewed two respondents in Kenya, who were already regular suppliers to humanitarian aid organisations, and were registered with the UN

⁵ Definition of the Ratings scale: 4 – Highly satisfactory; 3 – Satisfactory; 2 – Less than satisfactory; 1 – Highly unsatisfactory.

⁶ Please note that SSTP events in humanitarian supplies have been held in other programmes such as Sub regional trade expansion programme as well- some responses were received under those as well. This explains the difference in number of responses at the programme level (7 reported above, 10 in all).

procurement offices in Africa. One of them mentioned a few enquiries received from two agencies met at the event. This came to an end after three months. The other did not gain any business from the event. Both mentioned that while the need addressed by the programme remained, the benefits from the programme were minimal.

According to the suppliers, key issues that impede local supplies to humanitarian aid procurement are:

- Absence of common specifications even for simple products like pots, pans and tents.
- Lack of distinction between manufacturers and traders, which often results in traders getting consolidated orders for supplies of several goods, and negotiating with manufacturers after getting orders, which can often be exploitative.
- Absence of rate contract systems (based on normative costing) with indications of off takes over a longer period.

The selection of countries for fieldwork under this evaluation was based on volume of technical assistance received as well as the spread of coverage of various types of ITC projects. Africa has had the largest share of interventions that are now embodied under the SSTEP. The field observations were undertaken in countries that were part of the Intra African Trade Promotion and Southern African Trade projects, i.e. Kenya, Tanzania and South Africa, for the reasons mentioned above; and because they are the projects of longest duration under the SSTEP theme, with a sufficient base of events to be evaluated for impact over a longer time horizon (almost 10 years in case of the Intra African Trade Promotion). The desk studies cover SSTEP projects in Asia and Latin America.

Results assessment under individual projects covers the following aspects: relevance; performance of ITC (activities, efficiency, cost efficiency - where essential data was available); effectiveness (participation trends at buyer-seller events, trade information materials; and training of TSIs and consultants); outcomes/impacts (trade flows, and capacity development of support institutions); outreach and sustainability. In addition, the Evaluation makes findings on comparative advantage of ITC, and constraints and Opportunities in the external environment.

Email Survey of Beneficiaries and Trade Support Institutions

The purpose of the survey was to gauge the participants' experiences at the events and benefits to them, in terms of contacts made, business generated and related outputs. A very simple questionnaire⁷ was designed in order to capture only the most important observations, and to engender participation.

A list of participants for the events in Kenya and South Africa (the main venues for SSTEP events in East and Southern Africa) was sought and obtained from ITC. E-mails were sent to all the country TSIs listed and to all names appearing under selected specific product themes - food and beverages, textiles and clothing, and humanitarian supplies. Reminders were sent thrice over one month. Also, the local experts in the sample

⁷ Questionnaire samples appear in the Annexes.

countries contacted several entities for appointments, in preparation with the Evaluation's visit.

The response was dismal. Out of 168 questionnaires sent (of which TSIs: 7; Buyers: 78; Sellers: 86) 33 bounced back and 19 replies were received. This was an 11% overall success rate and a 14% net success rate. The response rate in one of the programmes (Buying from Africa for Africa) was higher: 10 replies out of 67 recipients - 15%. On the other hand, the sub-regional trade programme survey obtained only nine replies from 101 recipients, around 9%.

The summary of responses appears in the table below.

Table 8: Responses to E-mail Survey

	Questionnaires Sent					Mails Bounced	Responses Received				
	Total	K	T	SA	O		Total	K	T	SA	O
Textile & Clothing	59	-	1	25	33	16	5	-	1	3	1
Exotic Food & Beverages	42	-	3	21	28	9	4	-	2	1	1
Food, Shelter & Household (Enterprises)	38	27	5	6	-	-	7	6	-	1	-
Food, Shelter & Household (Donors)	29	25	-	-	4	8	3	3	-	-	-
TOTAL	168	52	9	52	65	33	19	9	3	5	2

Legend: K - Kenya; T - Tanzania; SA - South Africa; O - Other countries

This was a survey of targeted beneficiaries and partners who knew the programme and gained from it. Therefore, a higher response rate was warranted. The response rate of 11% is very low considering that all the target respondents were participants at SSTP events and were provided trade inputs, free of cost.

The Evaluation made the following efforts to increase the response rate:

- Sent reminders to the database explaining the significance of the evaluation and requesting recipients to complete and send the questionnaire. The names of ITC officials associated with SSTP and with the evaluation were also sent in case recipients wished to seek clarifications on the evaluation.
- Requested local partner TSIs (Trade and Investment South Africa (TISA) and Whitehouse & Associates in South Africa, EPC in Kenya and Board of External Trade in Tanzania) to furnish a list of participants who could be met in person.

Whitehouse and Associates provided some useful details and also assisted in arranging some meetings. EPC in Kenya and Board of External Trade in Tanzania stated they did not have a list of participants and did not follow up the programme. The official met at the EPC in Kenya was critical of the programme itself.

- Contacted several participants over email and phone to set up appointments. Many people had forgotten the details of the event and could not relate to the evaluation; some said the right persons were not available.

There can be several interpretations for this low response rate, principally:

- Changes in addresses of respondents, in which case the entire follow up mechanism of SSTP needs to be reviewed. This type of problem would have been captured in the bounced mails, and cannot apply to the TSIs, whose mail addresses were mostly valid.
- Spam filtering, for which there are no solutions. However, emails were resent using 'TTC evaluation' as the subject matter, which should have caught readers' attention in bulk mail folders at the time of deletion.
- Lack of interest in responding, in which case the selection basis and the likelihood of benefits from the programme can both be questioned. In this respect, the zero response from partner TSIs is a major cause for concern.
- Confidentiality aspects, albeit the questionnaires did not ask for any proprietary data. In this regard, reference is also made to an earlier observation in the mid-term evaluation of the programme in which ITC stated constraints in capturing information from participants, and had wanted to simplify the indicators of performance - from business gains to mere participation trends and usefulness of the information disseminated in the events.

However, it is most significant that none of the TSIs contacted that were ITC partners in the programme, responded to the questionnaires.

Therefore, the Evaluation considers the poor response to emails in itself an important finding and an indicator of the results from the programme. In the Evaluation's view, the low response is an indication of the loose targeting of participants and mismatch in buyer-seller profiles, at least in the earlier stages of the programme. It reflects inclusion of participants based on who expressed an interest in the sector rather than on identifying players having export readiness. It further demonstrates the lack of adequate interest and effort by TSIs partnering in the programme. These findings are presented in more detail below in the course of the evaluation.

1.4 Evaluation of Sampled Projects

As can be seen from the introductory section, SSTP activities have expanded to take place all over the world. However, Africa has had the longest history of this intervention, through earlier programmes that were precursors and are now part of the SSTP programme. Also, four of the 10 countries sampled for the ITC Evaluation are in Africa (Kenya, Tanzania, Tunisia, and Burkina Faso).

As previously mentioned, a detailed analysis has been attempted for SSTP projects in Africa. Detailed assessments including field visits were made for the following three programmes:

- A. The Intra African Trade Promotion Programme
- B. Sub-Regional Trade Expansion in Southern Africa
- C. Buying from Africa for Africa

A. Intra African Trade Promotion Programme

This Programme aimed at inducing African business partnerships across national borders, to expand regional trade, as an intermediate step towards integration of African enterprises into the global economy. ITC assisted regional TSIs in staging intra-African trade promotion events (BMSs). ITC also partnered with the World Economic Forum to organise trade promotion events on the sidelines of regional economic summits. More than 50 events have been held under this programme in its first phase (1992 – 2001), and a second (one-year) phase was approved in 2002.

Table 9: Summary⁸ of Project Details

Status and Duration	Completed (ten years)
Beneficiaries	Regional enterprises in more than 20 product groups, most important being Printing & publishing, Foods & beverages, Leather products and Humanitarian aid supplies.
Coverage/Location	All sub-regions of Africa
Major Objectives	<ul style="list-style-type: none"> • Establishing business linkages across borders in Africa in a variety of product sectors; • Improving operational performances of African enterprises and their competitiveness; • Building institutional capacity for sustaining the process of African market integration.
Project Results	<ul style="list-style-type: none"> • More than 50 BMSs since 1992, covering more than 20 product groups, based on trade flow analyses and demand/supply studies; • More than 1,550 participants attended events in the major sectors; • Tailor-made seminars and production of reference materials; • Partnering with World Economic Forum for regional Summits.

⁸ More details of the programme activities, results and the Evaluation's observations appear in the Case Studies.

Observations	<ul style="list-style-type: none">• Buyer-seller events were held regularly in a few sectors; more than five events each in Printing and publishing, Leather products, Humanitarian supplies and Food products.• Skills and capacities to stage events without support of ITC have been established in Printing and publishing. There is an attributable increase in book trade attributable to the events.• Results in other sectors have been less encouraging.
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Relevance

The programme is highly relevant to the region, considering that intra-African trade still amounts to a mere 10% of the region's total foreign trade. Africa has most of the world's mini-states, which severely limits economic development options. It is now generally recognized that improving regional integration is an essential condition for sustainable economic progress of the African continent as a whole. The New Partnership for Africa's Development postulates the promotion of trade as an engine of economic growth and development for African countries.

Efficiency

Throughout the programme, ITC produced the agreed outputs and activities as scheduled.

ITC documents indicate that the outputs targeted at business enterprises were: trade flow studies for intra regional trade potential events in several sectors, supply and demand surveys, company and product profiles (with an audit process), training and advice to exporting enterprises and TSIs on specific export-related topics; and the organisation of the BMSs themselves.

The outputs targeted at capacity development of TSIs were: development of a trade portal on the project, and training of staff in the use of ITC methodologies and tools to conduct similar events with reducing dependence on ITC.

Cost-efficiency

Cost-efficiency analyses *stricto sensu* cannot be made for ITC projects because of the accounting and reporting systems used. ITC does not maintain a country-wise or sector-wise budgeting of costs under its programmes, which makes it difficult to ascertain cost-efficiencies. However, a look at the budgets for the second phase (2002-2003) of the Intra African Trade Promotion indicates that, even after ten years of operations, allocations are very heavy for ITC located costs, with nearly USD 149,000 for ITC advisers and international consultants, out of the total budget of USD 255,000 for the one-year period. At the same time, costs for deliverable outputs in the form of supply surveys and training of TSIs accounted for only USD 49,000.

Results

ITC documentation indicates that the buyers-sellers meetings resulted in enhancing the capacities of the TSIs in: (i) organising such events, (ii) preparing guides and reference

materials for participants, (iii) use of ITC tools, and (iv) facilitating linkages between importers, exporters, investment promotion institutions, development finance institutions, etc.

The programme has been successful in improving the capacities of some TSIs in one sector (Printing and Publishing), leading to staging of subsequent events with reducing dependence on ITC.

However, meetings with ITC's national consultants as well as counterparts in Kenya, South Africa and Tanzania indicated that trade promotion bodies in the region - including TISA until recently - were seriously lacking in capacities to undertake such events on their own.

ITC has also brought out training materials and trade information that are recognized as useful and are used as reference on a number of products in this programme, and it assisted in the creation of sector portals such as the Leatherline.

According to ITC records, the participating enterprises also benefited from the events, as evidenced by the value of trade orders negotiated and initiated during these meetings. However, feedback from the limited e-mail surveys as well as meetings with participants indicates that business results have been rather insignificant, especially in food products and in humanitarian supplies.

Impact/Outcome

There is a clear correlation between intra-African trade in books and the interventions in the programme, as evidenced by the trade association for this sector. The dovetailing of the event with the Zimbabwe International Book Fair (ZIBF) appears to have borne results by attracting the right profile of participants.

There was also a significant rise in the regional trade in exotic juices and beverages (65% increase in South Africa's imports from Southern African Development Community (SADC) from 1995 to 1999), as observed by trade data for the products. However, these positive outcomes do not have any directly attributable link with the intervention, and probably have a greater link with Foreign Direct Investment (FDI) by large South African companies in the region. South African participants in the events felt that at the time, suppliers who attended the events did not have the requisite capabilities to supply the South African market.

Trade leads from the programme in the leather sector as well as in humanitarian supplies were below expectations.

B. Sub-Regional Trade Expansion Programme

Soon after sanctions were lifted against South Africa, and prior to this programme, ITC had conducted events in the exotic foods and beverages sector under the Intra African Trade Promotion Project covering SADC. This was to increase awareness of trade

opportunities between South Africa and other countries in Africa. Building on these preliminaries, ITC designed and implemented this three-year technical co-operation programme with the overall objective of increasing exports from the SADC region to South Africa. A target of USD 50 million from new trade flows was set for the programme.

Table 10: Summary⁹ of Project Details

Status and Duration	Completed (three years)
Beneficiaries	Regional enterprises in five product sectors: fish, textiles/clothing, leather products, wood and wood-based materials, and exotic food and beverages.
Coverage/Location	14 countries forming SADC.
Major Objectives	Increase in imports into South Africa from lesser developed countries in the sub-region, in the selected sectors (new trade flows of USD 50 million); Creation of sub-regional business networks.
Project Results	<ul style="list-style-type: none"> • Trade flow analyses and demand supply studies in selected sectors and countries; • Five BMSs in South Africa, one for each sector from November 1999 to July 2002; • Creation of Business Network (Southern Africa Business Forum) of TSIs from 13 countries and a web portal.
Observations	<ul style="list-style-type: none"> • Participants interviewed did not indicate any perceptible increase in trade flows attributable to the events. • There were serious mismatches in profiles of South African buyers and suppliers from other countries. • Supply-side constraints (exotic food and beverages) and market access constraints (fish) were identified as key obstacles in some sectors. • Trade information exchange through the business portal is not significant. • No repeat events were held in any of the sectors.

Using the ITC methodologies, five sectors were identified for the intervention, based on trade flow analyses and in consultation with trade promotion bodies from the 13 countries that participated in the programme.

According to ITC documentation, the following outputs were delivered:

- Five buyer-seller events, with nearly 300 participants, were held during 1999 to 2002, one for each sector. ITC reports that participants' feedback indicates the meetings were useful and met their expectations. In addition to providing a platform for negotiating direct import/export transactions, the meetings revealed the considerable potential for other forms of business co-operation, such as investments and joint ventures.

⁹ More details of the programme activities, results and the Evaluation's observations appear in the Case Studies.

- After the BMSs, ITC carried out missions in Tanzania, Zambia and Zimbabwe to follow-up on the participation of the companies from these countries in the buyers-sellers meetings. These missions provided useful inputs for enterprise-specific assistance activities, notably in the areas of standards compliance. Specific needs were identified in the wood products sector and fisheries.
- ITC assisted in creation of the Southern Africa Business Forum, a regional network of TSIs under the programme. ITC further provided some resources for a regional web portal to ensure a continuous exchange of information on trading opportunities, and to provide a permanent facility for the undertaking of market development activities in South Africa.

In 2001, ITC undertook an internal mid-term evaluation, which concluded that the project had contributed to increased awareness of the business opportunities offered by the South African market. More importantly, South African companies were gradually accepting the neighbouring countries not only as a market for South African products, but also as a source of supply. The evaluation recommended an extension of the project, which did not commence due to lack of donor funding - one probable reason could be because the global SSTP programme had been launched under the Global Trust Fund.

Relevance

The design of the programme was highly relevant to the needs in the region.

All respondents met during the evaluation considered the programme to be well timed and well designed, addressing the market information gaps in the region. The suspension of business under the apartheid period pointed out to the serious gaps in trade information and business links between South Africa and its neighbouring countries. Neighbouring countries were unable to take advantage of the market opportunities in South Africa, created by the SADC Trade Protocol. On the other hand, the opening up of trade soon resulted in an adverse trade balance within the region, which was 10:1 in favour of South Africa. This underscored the need for focused trade flow analyses and identification of market opportunities in South Africa that could be used by other SADC member countries. Market access opportunities under the SADC Trade Protocol were not being used efficiently because of these trade gaps.

Efficiency

Beneficiaries appreciated ITC's efficient handling of trade promotion events and the preparation of the demand-supply surveys.

While it can be argued that buyer-seller events could well be organised by chambers of commerce and industry bodies themselves - as is the case in several countries -, ITC has a unique specialisation in the design and organisation of BMSs, and manages them like clockwork. Respondents felt that:

- The matchmaking programme and the processes in the BMSs are much better than similar events organised by local chambers of commerce and industry associations.

- The demand and supply surveys are highly useful and have a long shelf life even after the events. The quality of supply surveys has improved in some countries, though some countries still require external consultants to produce these surveys.
- The formats of the buyer-seller events are replicable and can be easily transferred to TPOs to host similar events on their own initiative.

The importance of a match making process as well as adequate sensitisation through demand and supply profiles - key features of the ITC approach - has been recognised.

The Evaluation was informed that attempts by other bodies to organise similar BMSs, have not been successful, due to serious mismatch in the profiles of buyers and sellers. For example, in an event arranged by the Johannesburg Chamber of Commerce, in which over 100 large South African companies participated, while South African participants were from manufacturing industries, participants from several other countries were artisans and crafts persons.

Results

The initial meetings were reported as highly successful, inasmuch as they were introductory meetings, and opened up prospects for transactions over the next few months among participants. However, the business results from the events in the programme have been lacklustre, even though participants gained new knowledge and exposure to market opportunities in the region. The Evaluation considers the following points as important factors responsible for the inability of the participants to convert trade opportunities into business:

- Because there was no prior history of trade with South Africa, the theoretical supply potential was 'enormous', as per the formula used by ITC. However, with the exception of fish products from Mauritius, there were no significant existing exports of the selected products from most countries. Thus, South Africa was to be the first export market for several countries in the products selected for the events.
- South Africa is a much more sophisticated market than the other participant countries. This resulted in a serious gap between buyer needs and supplier capabilities, as stated by some South African participants met by the Evaluation. The supply studies do not seem to have taken these factors on board in determining a realistic estimate of trade potential.
- South African enterprises had flocked to the first BMSs, finding it a very exciting opportunity to meet up with businesspersons from Africa. Similarly, participants from other countries had expectations of being able to enter the South African market. But the enthusiasm of South African business enterprises apparently dropped, as they found the prospective suppliers absolutely unequipped to meet their specifications and standards.

The summaries of responses to the e-mail questionnaires sent to 101 participants in two events have been tabulated below. The Evaluation received only nine responses, despite follow up by mails. None of the TSIs, which were partners in the programme, replied to the questionnaires.

Table 11: Buyer-Seller Meeting -Textile & Clothing-July 16-17, 2002

Perception of the utility of the Buyer Seller Programme	Scores on scale 1(none) to 4 (significant) of five responses
Increase in business	2,1,1,1,1; mean score 1.2
Introduction of new suppliers/buyers	1,1,1,2,1; mean score 1.2
Useful information on buying procedures	2,1,1,1,1; mean score 1.2
Quality of supply and demand surveys	1,1,1,2,1; mean score 1.2
Awareness raising of problems, bottlenecks	1,1,1,2,1; mean score 1.2
Overall	2,1,1,1,1; mean score 1.2

Total Sent: 59; Responses Received: 5

Table 12: Buyer-Seller Meeting-Exotic Food & Beverages 28-29 Nov 2000

Perception of the utility of the Buyer Seller Programme	Scores on scale 1(none) to 4 (significant) of four responses
Increase in business	1,2,1,1; mean score 1.25
Introduction of new suppliers/buyers	1,2,1,2; mean score 1.5
Useful information on buying procedures	1,1,1,2; mean score 1.25
Quality of supply and demand surveys	1,1,1,2; mean score 1.25
Awareness raising of problems, bottlenecks	1,2,1,2; mean score 1.5
Overall	1,2,1,1; mean score 1.25

Total Sent: 42 Responses Received: 4

Impact/Outcome

The project specified 'at least USD 50 million of new trade transactions negotiated between regional exporters and South African importers' as a performance indicator for the project. Based on the business results from the events, it can be inferred that the outcome has been nowhere close to these target levels.

Despite having a clear, quantitative indicator of the project's performance, the ITC evaluation of the programme attempted no measurements of trade flows among participant countries. Instead, ITC's internal evaluation of the programme (2001) touches on soft gains, citing the project as having initiated a process: establishing synergies with other ongoing projects in the region, identification of trade constraints, investment opportunities, etc.

However, the programme has shown some positive outcomes on other important aspects:

- A major outcome of the programme is that ITC has transferred skills and enhanced the capabilities of one of the local partners - Whitehouse & Associates -, which has arranged 12 BMSs since 1992. On the basis of the ITC experience Whitehouse & Associates has been recognised as a key resource in the region for trade promotion strategies.

- South Africa is on course with its national trade strategy and trade information system - with ITC support. This has improved its internal organisation and prepared it for the tasks and issues it needs to take up in expanding South Africa's trade in the region as well as outside. TISA has set up specific performance targets as the National Trade Promotion Body, benchmarking with international TPOs.
- South Africa is now at the weaning stage in ITC's activities, and this in itself is a sign of recognition of its improved capacities over the recent years with ITC support. Officials felt that there now is a better understanding of internal constraints, and lessons from past failures in regional trade promotion activities have been learnt well. TISA considers itself ready to organise BMSs on its own over a period of one or two years. This makes TISA a better regional partner for trade promotion activities.
- By and large, business enterprises have a positive feeling for the quality and the efficiency of the buyer-seller events themselves, and would like to see their continuance, irrespective of the outcomes and gains for their own businesses. Several enterprises reported positive experience with ITC's information products and technical seminars as well.

C. Buying from Africa for Africa

This was a new dimension to the SSTP programme, aimed at increasing Africa's participation in development aid procurement. The participating countries at the event are selected from the results of a trade flow analysis to identify the export potential of these countries with regard to shelter, personnel protection and household items. The participating companies at the event are identified by TPOs in the selected countries, and short-listed based on the recommendations of auditors who visit them in each country. The auditors also offer consultancy assistance to the companies in preparing for the event, advising them beforehand on the requirements of the agencies.

Table 13: Summary¹⁰ of Project Details

Status and Duration	2002-2005
Beneficiaries	TSIs, Business enterprises participating in buyer seller meetings.
Coverage/Location	Sub-Saharan African countries.
Budget (Donor)	Part of SSTP budget of USD 2,100,000.
Major Objectives	Enhancement of procurement from African suppliers by humanitarian organisations.
Project Results	Intra trade potential studies, Product selection workshops, Supply-demand surveys, Pre-selection and audit of participants, and Organisation of buyer-seller events.

Relevance

The Buying from Africa for Africa programme is highly relevant considering that: (a) Kenya, the location for two events under the theme, is home to the regional offices of several aid procurement organisations, and can facilitate the increased integration of local suppliers to the regional procurement system, and (b) Humanitarian organisations disburse a substantial amount of supplies in Africa. The buyer and seller profiles are highly complementary and this opens up a new possibility in trade enhancement in the region.

Efficiency

Respondents said the SSTP events were organised efficiently, and found considerable use from the information and seminars. ITC has a unique format for the SSTP, which makes it easy to administer the contact schedules for the BMSs. The location of a large number of buyer agencies in Kenya also enabled a second buyer-seller event to be organised without the support of ITC. The quality of information provided on aid procurement is very useful to prospective suppliers.

Cost-efficiency

There is no comparable benchmark for the SSTP, given its unique design. Several inputs from ITC go into the delivery of these outputs, resulting in high Geneva-located costs. The actual allocations for the surveys and the meetings account for less than 30% of the overall budget. Given that SSTP events are repetitive and several such events have been held in the participant countries, local partners should increasingly be able to arrange similar events with considerably lower budgets than ITC.

¹⁰ More details of the programme activities, results and the Evaluation's observations appear in the Case Studies.

ITC documents indicate that the costs of holding the events themselves are below USD 10,000 per event, with a participation of 50-100 enterprises. This is very much in line with events organised by chambers of commerce in several developing countries.

Results

One positive outcome has been the transfer of skills in organising buyer-seller events, as shown in the independent handling of the second meeting in 2003 without ITC assistance.

Yet, despite the extensive preparations in the drawing of participants and the good targeting of participants, business results from the events have been limited; and many participants could not increase their business or obtain registrations with a large number of participating institutions. However, the experience of participating in such events has improved knowledge of the buying procedures of buyers and assisted supplying enterprises in customising their marketing approach/practices to the requirement of specific buyers.

Impact/Outcome

Stakeholders involved in the aid procurement project - which had two events in Kenya and also a supporting programme for the TSIs - did not expect to see major impact from the aid procurement programme. They also did not seem to have a high opinion of the aid procurement system, and cited the following aspects:

- Aid agencies do not follow a transparent procurement process;
- It is very difficult for new suppliers to get into the system;
- Traders often get orders for products that manufacturers themselves are unable to procure directly, which leads to exploitation by traders; and
- Aid buying is an *ad hoc* process and it is very difficult to prepare systematically for this segment.

However, the project has created the conditions for prospective suppliers to form an alliance to represent collectively before the procurement organisations. Such an alliance is under exploration - partly a result of discussions between end users and consultants.

Aid procurement is a lengthy process and suppliers require adequate follow up. In the absence of a collective process in compiling requirements, and representations before buyer agencies to simplify and clarify on procedures, the buyer-seller event alone cannot have a lasting impact. At the same time, there is a need to monitor and aggregate procurement requirements and to disseminate them to prospective suppliers. Suppliers also need to address the need for standardisation in buying practices of different agencies, especially in setting specifications of simple products. This role has not been performed by any entity in the programme.

4. Desk Reviews of Other South-South Trade Promotion Programmes

The following table enumerates the various activities reported by ITC from 1999 to 2003:

Table 14: Summary of Year-wise Activities

Year	Trade Flow Analyses	Demand Supply Surveys	Buyer Seller Events	Regions Covered
1999	5		2	ASEAN ¹¹ /SE Asia, ECO ¹² , Interstate Council, ECOWAS ¹³
2000		9	1	ECO
2001		47	4	ECO, SAARC ¹⁴ /ASEAN, China, Central America
2002	3	25	4	Africa, Asia-Pacific, Latin America
2003		40	8	Africa, Asia-Pacific, Latin America

These covered a wide range of sector themes such as textiles, agro products and processed foods, pharmaceuticals, shelter and household items, construction materials, printing and publishing, services and auto components, besides events. Altogether, close to 900 firms are reported to have participated in these events over five years (1999-2003). Some of these events were inter-regional - for instance the Africa-Asia Business Forum -, and dovetailed with other major events such as the African Economic Summit and the tenth session of UNCTAD.

According to ITC, the impact of the SSTP programme has improved significantly, as reported by the following results for 2003:

- 518 Small or Medium-sized Enterprises (SMEs) participated in 14 SSTP events and 48 supply and demand surveys were produced;
- 34 of the 48 surveys were prepared by developing country TPOs under ITC guidance and sponsorship, and
- SMEs participating in SSTP-sponsored activities reported more than USD 43 million business transactions as a direct consequence of their participation, against an expenditure of USD 1.756 million.

A few specific events under the programme were perused and discussed with ITC officials to understand the improvements made by ITC in the SSTP format, drawing on lessons learned from earlier programmes in Africa.

¹¹ Association of South East Asian Nations

¹² Economic Co-operation Organisation

¹³ Economic Community of West African States

¹⁴ South Asian Association for Regional Co-operation

South-South Trade Promotion Events in Pan Asia¹⁵

This programme aims at strengthening business linkages between enterprises in Association of South East Asian Nations (ASEAN) countries with their counterparts in the Asia Pacific region. By providing a background for formulation of a medium/long-term Pan Asian trade Expansion strategy and rendering quality advice regarding advantages of intra regional trade opportunities, through capacity building of chambers and TSIs. A major component of the project was a series of buyer-sellers meetings, covering four product groups: Agro Products & Processed food, Automotive components, and Pharmaceuticals and Textiles.

Based on the documents studied and discussions with ITC officials, the salient improvements noted in the SSTP programme in Asia are:

- New sectors have been introduced in the programme drawing from regional competence areas;
- The selection of participants has moved beyond the strictly SMEs focus, and included larger enterprises too, based on the potential to enhance trade flows in the sectors; and
- Participants and beneficiaries funded a large share of costs for the event.

Pan Asian Buyers-Sellers Meeting on Agro Products and Processed Food

Singapore, November 9 - 11, 2001

The meeting was attended by 69 representatives from 56 enterprises from South Asia, South East Asia and China, with interests covering a wide range of product groups: Food ingredients & fragrances, Fruit & vegetable juices, Cereal products, Oilseed products, Apicultural products, spices, confectionary and specialty food products.

ITC documentation on the feedback from participants indicates that:

- Participants evaluated the meeting as very critical in accessing new markets;
- Information on products and markets collected for the event was significant in making regional trading environment more transparent;
- It not only provided a platform for negotiating direct import/export transactions but also revealed potential of investments and joint ventures; and
- Participants found the meeting very useful and strongly recommended organising such events on a regular basis.

Evaluation's observations:

The Evaluation observes that the programme appears to have taken a very large agenda in the complex food sector, leading to a diffused representation of enterprises scattered across a large range of products. It is argued that events focusing on a narrower theme

¹⁵ ITC titled the programme Pan Asia. Participant countries specified in footnote 2 above.

with a complementary profile of products such as oilseeds, edible oils, animal feed packaging, etc. would be more effective. Also, supply surveys in food should take into account the varied and diverse consumer tastes and preferences across such a diverse selection of countries. Account should also be taken of other sensitivities of some cultures and religions. Similar constraints must be noticed in the events under the Southern African Trade Expansion Project as well, which do not seem to have been considered while designing subsequent events.

Pan Asian Buyers/Sellers Meeting on Automotive Components

Singapore, December 13-14, 2002

95 representatives attended the meeting from 65 enterprises from 10 countries. The profile of participating enterprises included Vehicle Manufacturers & Assemblers, Original Equipment Manufacturers (OEMs), Systems Aggregators and OEM suppliers, traders, wholesalers and retailers. Participants found the meeting very useful and strongly recommended organising such events on a regular basis.

Evaluation's observations:

Auto components are increasingly becoming part of vertically integrated global supply chains, and therefore do not lend themselves to sporadic trade patterns. There are two target customers in an SSTP type intervention: the large global OEM supply chains of automotive manufacturers (Delphi, Toyota System, etc.), and the widely dispersed after-sales market, which mainly includes non-recognised suppliers. OEM supply chains involve a rigorous and highly time-consuming process of vendor development/selection and buyers prefer to deal with a few but highly reliable suppliers for their production requirements across various geographical regions. ITC identified large after-market players and large OEMs to participate in the event, which is expected to increase the utility of the event. However, there would be improved results from customisation of supply surveys to incorporate the sourcing requirements expressed by large buyers.

Asia HealthCare 2004 /Buyers-Sellers Meeting on Pharmaceuticals and Natural Products

Singapore, July 14-16, 2004

The meeting was attended by 93 enterprises from 16 countries, and the products included active ingredients and starting materials, formulations, biotech and natural products.

ITC reports indicate that results were highly encouraging: Eight companies reported having signed new transactions, eight reported talks to explore joint venture opportunities and 40 companies reported identification of new potential distribution channels within the region. More than half the companies found new contract manufacture/sourcing opportunities. Several companies agreed that the meeting provided information on regional trading opportunities and 85% companies promoted their products within the region.

Evaluation's observations:

There are complementarities in Asia in the pharmaceutical sector, with India and China becoming the preferred sources for Active Pharmacy Ingredient in generic medicines, while domestic formulators manufacture and market formulations. However, the interplay of Trade Related Intellectual Property Rights legislations among partner countries, and the provisions with respect to alternative medicine forms - which are not recognised in many countries as therapeutic materials - are important aspects in determining the trade potential in this highly regulated sector. Events should also focus on the emerging opportunities for research alliances and outsourcing multi-country clinical trials for new drugs.

LatinPharma 2003 and 2004

LatinPharma is an event focusing on essential medicines and on natural products derived from medicinal plants and allowing for the private sector to create links among themselves and with research institutes and universities. The main objective of LatinPharma is to promote intraregional trade and, by fostering strategic alliances among local partners, improve the region's competitiveness in the pharmaceutical sector. Launched in 2002, it was held in El Salvador and subsequently in Peru (for the Andean Community) and Brazil (for Mercosur- Secretariat of the Andean Community of Nations -Chile community) in 2003 & 2004, respectively. The event was developed based on trade flow analyses for the region conducted by ITC. These indicated that the Andean Community is a region with mega biodiversity and Peru alone possesses around 20% of the medicinal plants of the whole region. Similarly, analysis of trade flows for Mercosur, Secretariat of the Andean Community of Nations and Chile revealed high levels of imports and regional trade potential of USD 200 million.

The format included an e-mail discussion forum on a dedicated website preceding the event, a multiple topic conference, and a trade fair at the venue of the event, besides the BMSs themselves.

***Andean Community: Programme for Intra Regional Trade Expansion
LatinPharma 2003***

The event covered the five Andean countries (Bolivia, Colombia, Ecuador, Peru and Venezuela) and was supported by five TSIs and the Secretariat of the Andean Community of Nations. Another important regional body, Andean Development Corporation (CAF) provided financial support to bring officials responsible for the registration of pharmaceuticals to attend the event.

According to ITC, 726 people from 31 countries registered for the five-topic discussion forum and over 300 attended the trade fair, conferences and a BMS. The Trade fair comprised 22 stands reserved through the LatinPharma website and was a huge success.

80-90% of the participants rated the event as “very useful” or “useful” and 99% consented for participation in a future event in Brazil.

The participants unanimously agreed to the usefulness of the discussion and requested for such interventions to continue on a regular basis and information related to the topics be made available on a permanent basis in the LatinPharma website.

Participants for LatinPharma were selected on the basis of specific criteria such as availability of exportable capacities and prior experience in trade, and not only on grounds of being SMEs interested in exports.

Marcos- Secretariat of the Andean Community of Nations -Chile: Programme for Intra Regional Trade Expansion LatinPharma 2004

The event aimed to assess trade potential in pharmaceuticals among countries in the Andean Community of Nations, the Southern Cone common market (Mercosur) and Chile. It was organised and managed by a Non-Governmental Organisation (NGO), Cultural Immersion Experience based in Peru and moderated by experts from another NGO, Eduzyme. Over 1,000 people participated in a five-topic email discussion forum and more than 300 from 15 countries attended the trade fair, conference and BMS.

Based on the profile form completed by the participants, 57 companies participated in the BMSs. Orders worth USD 315,000 were placed and business worth USD 3.38 million was reported to have been initiated at the event.

Evaluation’s Observations:

There are some positive features of the LatinPharma event, which draw on the lessons from earlier events and improve the effectiveness of ITC’s delivery.

- The programme design itself has been improved substantially and extends beyond a simple buyer seller-event by including a preparatory email forum, a trade fair, and trade conference consisting of parallel sessions. This enhances the utility of the programme for repeat participants.
- Sector bodies and local counterparts did much of the preparatory work in the programme, which points toward increasing sustainability.
- Counterparts raised significant contributions from sponsorships, which is not to be found in several other regions in which the SSTP operates.
- Selection criteria for participants have been made more meaningful to include a wider profile: (i) a small or medium sized company, (ii) national ownership, (iii) running below 50% of installed capacity, (iv) established in their own markets, and (v) with some trade experience.
- There is an effective dissemination of information: the LatinPharma website has exhaustive content and registers a sizeable number of visitors, an average of 1,515 people per month.

The desk analysis and interviews with concerned ITC personnel in the above programmes indicate that the SSTP has been improved in design; and emphasise more attention and detail to product and enterprise selection. ITC seeks out partners that are capable of handling the programme with declining financial support from ITC. All these are positive trends for the future results from the SSTP programme.

1.5 Programme Evaluation

This section presents the evaluation findings on the SSTP programme, based on the observations on the various strands made in the previous section.

Relevance

Rating: 4 on a scale of 1 –4

The Development Relevance of the Programme

The programme has special relevance for countries that are in transition or have been through periods of political isolation from the rest of the world, as demonstrated by the case of South Africa and some of the erstwhile Soviet bloc countries. Business enterprises in such countries did not have links with export markets, and when these markets became accessible, lacked the knowledge of these markets. The presence of a trade linkage programmes like SSTP supported these countries with useful trade information, bridged trade information gaps and brought enterprises in these countries into contact with buyers and sellers from other countries. Also, a programme like SSTP shortens the time to acquire conversance and experience with export markets. Finally, intra regional trade expansion has innate cost advantages arising from proximity and tariff preferences among contiguous countries.

The three programme themes studied in the evaluation were found to be very relevant to their settings and beneficiary countries:

- Intra African Trade Promotion (A): The programme focussed on improving on the low intra- regional trade in Africa, which has most of the world's mini-states, which severely limits economic development options.
- The Sub-regional Trade Promotion Programme in Southern Africa (B) sought to bridge the serious gaps in trade information and business links between South Africa and its neighbouring countries.
- The Buying from Africa for Africa programme (C) sought to facilitate integration of local suppliers to the regional procurement by humanitarian organisations, which disburse a substantial amount of supplies in Africa.

Further, the programme interventions are direct, as they address priority sectors and target small enterprises, which lack the capacities to undertake trade flow analyses and demand assessments on their own.

Efficiency

Rating: 3.5 on a scale of 1 –4

The buyers-sellers event format is highly standardised and the inputs are more or less similar in all events under the intervention.

In all the projects studied, the assessment is that ITC provided its inputs efficiently and within the costs budgeted. The demand and supply surveys were produced by national

institutions and consultants in most countries, and all the preparations for the events were done smoothly, according to the partnering institutions. ITC also deployed its customised matchmaking software to enable a high throughput of matches (400-1000 in some cases) and efficient handling of the buyer-seller events.

Beneficiaries appreciated ITC's comparative advantage in organising trade promotion events.

While it can be argued that buyer-seller events could well be organised by chambers of commerce and industry bodies themselves - as is the case in several countries -, ITC has a unique specialisation in the design and organisation of BMSs, and manages them like clockwork.

During the field studies, the Evaluation came to know of attempts by other bodies to organise similar BMSs, which have not been successful due to serious mismatch in the profiles of buyers and sellers. In an event arranged by the Johannesburg Chambers of Commerce, in which over 100 large South African companies participated, South African participants were from manufacturing industries, while the participants from several other countries were artisans and crafts persons.

Demand and Supply Surveys

Overall, there has been a significant improvement in the preparation of demand/supply surveys by all countries. ITC and its partners have also been able to develop a pool of national consultants in the region to undertake basic supply capacity surveys, with quality control by ITC. However, there is limited availability of staff within the TSIs to take on these tasks. In addition, there continues to be dependence on external resources, although the budgets for surveys are modest - about USD 2,500 per survey per country.

The initial surveys focused only on trade potential and supply capacity in numerical terms. However, trade barriers, such as food hygiene standards in fish and several food products, emerged in many sectors despite identified trade potential, as a result of which market access opportunities could not be harvested.

Initially, demand/supply surveys, for example in South Africa, did not include sections on market access constraints, tariff levels, etc., and enterprises were not well aware of the constraints in exports or sourcing goods. It is noted that such additional details were being included in the more recent surveys in Asia and Latin America¹⁶.

Targeting of Participants

Despite the attention paid to the identification of enterprises for the buyer-seller events, the feedback to the Evaluation by national consultants involved in the programme and

¹⁶ These programmes are more recent, lessons have been learnt with respect to constraints and these are included in the demand supply surveys. This is assumed to also happen in Africa, as the IATP is subsumed under SSTP. Improved targeting of enterprises. However, quality of studies is found to be low and knowledge of trade barriers is low. Other ITC programmes are partly addressing these aspects.

participants at some of these meetings, has been that matching of buyer and seller profiles was far from optimal in several themes, most noticeably in the Sub-Regional Trade Expansion Programme. Many seller-side participants in the events were first-time exporters or persons interested in exporting. On the other hand, buyer-side participants were looking for experienced exporters who could meet international specifications and also understand export transaction terms.

While the target beneficiaries are the SMEs, export-readiness rather than enterprise size should become a prime criterion for selecting enterprises for the programme. Enterprises participating in the programme should have some prior exposure to export processes, and it is a waste of resources to bring non-exporters into such a focused contact programme. This has been attempted in the Buying from Africa for Africa programme, although without adequate success. Other factors outside ITC control have a major part in this programme, as explained later in the report.

The Evaluation are informed that ITC is addressing these issues in present programmes (e.g. in Pan Asia), and participant lists comprise a mix of export ready enterprises and a smaller constituent of new or non-exporters.

Also, enterprise selection should include more dimensions that indicate export-readiness for the buyers that are seeking alliances of suppliers through the programme. This point will be elaborated more in the Effectiveness section.

Cost-efficiency

Cost-efficiency analyses tend to be difficult for multi country programmes, especially given ITC's budgeting and expenditure reporting systems. However, some indicators can be studied for the SSTP programme, whose end result is a buyer-seller event.

The first phase of the SSTP programme entailed a budget of USD 1.362 million, most of which went into technical preparatory work on organising the programme in various countries and in preparing demand-supply surveys - USD 390,000 was spent for national consultants, in addition to ITC internal advisors costs. The final events, the five buyer-seller events themselves, in which over 300 African enterprises participated, accounted for only USD 50,000, less than 4% of the programme budget.

Also, a perusal of the Intra African Trade Promotion programme budgets proposed for 2002 indicated heavy ITC-located costs, with nearly USD 149,000 allocations for ITC advisers and international consultants, out of the total budget of USD 255,000. At the same time, costs for deliverable outputs in the form of supply surveys and training of TSIs accounted for only USD 49,000.

The costs of holding the events themselves are below USD 10,000 per event, for a participation of 50-100 enterprises. This is very much in line with events organised by chambers of commerce in several developing countries. However, for a transactions-based programme, the SSTP has a high share of preparatory costs. The absence of sector-

specific enterprise databases and inadequate capacities in TSIs to undertake reliable surveys justified the use of national consultants and facilitators in the initial stages.

An important objective of the SSTP is to transfer these capabilities to partnering TSIs. Therefore, a good indicator of successful transfer of skills under the programme would be the progressive reduction in the overall programme budgets, especially under the heads of ITC support costs, without a reduction in the coverage of countries, or the number of buyer-seller events.

Ideally, if national TSIs were able to conduct these events with little or no support from ITC, the same deliverable outputs from the programme would have cost only USD 295,000 for the 40 surveys and the five BMSs held in the first phase. Therefore, the value of the technical assistance component delivered by ITC under phase I can be imputed at nearly USD 1.07 million (Programme budget less external deliverable output to final beneficiaries). However, in many of the sectors, ITC partners continue to depend on ITC for a large share of preparatory assistance. This is analysed further in the next sections.

While the above estimations are for earlier regional programmes, an estimate of the cost-efficiency of the present SSTP – as a global programme - can be found in ITC's own documentation of results reported for 2003, according to which:

- 518 SMEs participated in 14 SSTP events and 48 supply and demand surveys were produced;
- 34 of the 48 surveys were prepared by developing country TPOs under ITC guidance and sponsorship, and
- SMEs participating in SSTP-sponsored activities reported more than USD 43 million business transactions, as a direct consequence of their participation, against an expenditure of USD 1.756 million.

The cost estimate for the year has been reported as close to USD 1.76 million. Of this, the cost of demand supply surveys, budgeted at USD 2,500 each, is estimated at USD 120,000. Therefore, ITC internal costs and costs of events can be estimated at USD 1.63 million. Although some internal costs would go into preparations for subsequent years, this would be more or less true of each year. Therefore the budgets used in a year can be apportioned to the outcomes during the same year. Based on the participation levels reported, the cost of the SSTP delivery is USD 3,150 per beneficiary. The average participation in SSTP events was 37 beneficiaries per event. Thus the attributable cost of the programme per event is USD 116,500.

This again confirms the continued high Geneva-based costs of the programme, despite the increasing contribution of TSIs to demand surveys, and a declining financial support to event costs.

Effectiveness

Rating: 2.5 on a scale of 1-4

Capacity Building of Trade Support Institution Partners

One performance indicator is the ability of local TSIs to independently undertake buyer-seller events, applying the ITC methodology. A study of past events indicates that South Africa, Kenya and Nigeria have hosted the most events; ostensibly due to their being the most convenient locations - logistics and infrastructure - within the regions for business meetings. Therefore, there would be reasonable expectations that these TSIs would have assimilated the skills required to organise BMSs, especially in case of repeat events within the same sector.

However, discussions with the TSIs, including TISA - which could be considered as having the best capacity among all African TSIs - indicate that there continues to be financial as well as technical dependence on ITC toward trade promotion events. Furthermore, TSIs feel that they are not yet fully ready to take on the tasks of organising such events, for the following reasons:

- A shortage of suitably qualified staff.
- TSIs in many countries have not reached self-sufficiency through revenue generation and continue to depend on external support. Costs for travel and accommodation for TSI personnel have to be borne by sponsors or participants.
- According to ITC's own documentation, despite several years of involvement with ITC in such events, most institutional partners have not demonstrated capacity to organise buyer-seller events on their own.

However, there are exceptions and some positive outcomes:

- ITC has transferred skills and enhanced the capabilities of one of the local partners - Whitehouse & Associates -, which has arranged 12 BMSs since 1992, and on the basis of the ITC experience, has been recognised as a key resource in the region for trade promotion strategies.
- South Africa is on course with its national trade strategy and trade information system, with ITC support. This has improved its internal organisation and prepared it for the tasks and issues it needs to take up in expanding South Africa's trade in the region as well as outside. TISA has set up specific performance targets as the National Trade Promotion Body, benchmarking with international TPOs.
- South Africa is now at the weaning stage in ITC's activities, and this in itself is a sign of recognition of its improved capacities over the recent years with ITC support. Officials felt that there is now a better understanding of internal constraints, and lessons from past failures in regional trade promotion activities have been learned well. TISA considers itself ready to organise BMSs on its own over a period of one or two years. This makes TISA a better regional partner for trade promotion activities.

- Some partners have demonstrated the capability to organise SSTP type events with little or no support from ITC. These include the African Publishers Network (APNET) in the Printing and Publishing sector, International Institute of Singapore in the Asia-Pacific region, Arab Trade Financing Programme in the Arab States and Fundes International in Latin America.

By and large, business enterprises have a positive feeling for the quality and the efficiency of the buyer-seller events themselves, and would like to see their continuance, irrespective of the outcomes and gains for their own businesses. Several enterprises reported positive experience with ITC's information products and technical seminars as well.

Awareness and Exposure for Participants

The networking and learning opportunities are considered useful results. Buyer-seller events have been instrumental in generating business in printing and publishing in good measure, due to timing the events along with the international book fairs in the region.

Business for Participants

Overall, the buyer-seller events have not been effective in generating significant business for participants. A few events, such as the Printing and Publishing events in Africa, and the LatinPharma in Latin/Central America¹⁷ have proved to be effective business platforms for the sector and the participants. However, events in most other sectors have not resulted in actual business transactions for participants.

ITC has reported constraints in obtaining information on business transactions, citing these to be proprietary information, but on the other hand, ITC always refers to business results in defence of the programme. Specifically, reference is made to the ITC's statement that the SSTP has improved significantly, with more than USD 43 million business transactions reported in 2003 against an expenditure of USD 1.76 million. It is to be noted that these transactions are estimates made from exit interviews at the events themselves, therefore they cannot be used as direct evidence of business results.

In the assessment of the Evaluation, the poor results for participants are to a great extent on account of ineffective targeting and matching of participants. The programme's focus on SMEs as beneficiaries is well intended. However, in order to become more effective, the programme design needs improvement in tightening the selection of participants. This is further elaborated in the next sections.

Outcomes/Impacts

Rating: 2.5 on a scale of 1 –4

Trade Flows

The programme has made no noticeable contribution to trade flows at the sector level.

¹⁷ Explained in case studies page 74.

In most sectors, buyer-seller events have not been effective in generating significant business for participants or expanding intra regional trade significantly in the selected products. However, there has been a consistent increase in the intra regional trade in books, as reported by the APNET. This can be correlated to the events under this Programme. Intra regional trade in books, as compiled by the APNET, grew from USD 2300 in 1999 to more than USD 4 million in 2004. This growth can be substantially attributed to the SSTEP, as it is the major intervention in the region in this sector.

In another sector, processed foods and beverages, sector trade flows increased significantly, with South African imports from SADC increasing 65% from 1995-1999. However, there were sharp reductions in some member countries, e.g. Mauritius with a -55%, while other members had sharp increases, e.g. Tanzania with an increase of 113%. However, these are not attributable directly to the SSTEP, given the discouraging experiences that buyers have reported from the BMSs arranged under various events. The biggest factor in the increase of exports has been understood to be the intra-affiliate exports of South African companies, which invested in the region in subsidiaries and joint ventures. All major supermarket chains have procurement and local sales operations in several SADC countries. According to the national consultants Whitehouse and Associates, these chains did not participate in SSTEP except in the first two events.

It is conceded that the scale of the project is too small (100-200 participants) to make a dent in the trade flows among countries. With an increased funding support to the programme, ITC can probably create greater impacts in terms of trade flows in some other sectors. Alternatively, greater selectivity in the themes and countries should be exercised in order to increase the budgets for a few high potential sectors first, instead of spreading resources too thin.

On another level, it would also be worthwhile to re-examine whether ITC should accept an increase in trade flows as a direct target to be delivered by the programme. Given the presence of other factors, it would be more realistic for the programme to target beneficiary level results rather than regional trade flows within the selected sectors. At the same time, the programme design must enjoin participants to report business results without giving proprietary details.

Business for Participants

Business participants are expected to benefit from the programme through enhancement of business contacts and exposure to trade opportunities.

However, the feedback to the Evaluation has been that projects in Africa have not had a perceptible impact on trade transactions, despite the elaborate targeting of enterprises in the buyer-seller events. In the Sub-Regional Trade Expansion Programme, this has been primarily due to a mismatch of buyer and seller profiles, and inadequate identification of supply side constraints.

The few e-mail responses indicate that most participants did not get business through the SSTEP events, though the events were of some use in identifying opportunities and

providing useful trade information and leads. This is evident from the steady increase in overall participation in the BMSs in some sectors.

The key limitation of the programme's effectiveness is that it can only highlight trade opportunities and bring enterprises together, but given its mandate, it cannot intervene on enterprise competitiveness issues and trade constraints directly. Even within its own mandate, the 10-plus years of experience suggest that new approaches are necessary. ITC reports indicate better results from SSTP events in other regions, especially in Latin America and Asia-Pacific, than in Africa. ITC indicated business transactions worth USD 43 million in 2003, from the 14 events organised under the programme (although these are only exit interview estimates).

Improvement in business results for participants can be attributed to (i) improvements in programme design, especially the inclusion of additional criteria for export-readiness rather than SME qualifications alone, as in case of Latin Pharma; and (ii) aligning smaller suppliers with large buyers, as in case of Pan Asia events in automotive components.

Overall, the Evaluation considers the ITC intervention in printing and publishing to be a model and a benchmark for best practices as well as success in the SSTP Programme.

In the Evaluation's opinion, the following were the key ingredients in this success:

- **Product focus:** the product was very specific - books and publications - and therefore, allowed for a good targeting of participant enterprises, and maximising the utility from the contact programme. In some other sectors, the groupings were very loose such as exotic food and beverages, which included more than 20 product groups, each very different from the other.
- **Partnering with a sector association** instead of a national TPO, which brings the organisation of the programme to the direct representatives of stakeholders, who have the most effective outreach within the sector.
- **Innovative placement of the programme-** alongside the international book fair enriching the value of events and exposing participants to new business opportunities. There have been requests, for instance from Central African Economic & Monetary Union and West African Economic & Monetary Union countries, that national fairs for publishing industry organised by the departments of education and associations should include such business-oriented components.
- **Sustained activities with dynamic content-** more than six events were held in this sector, more than any other sector, and subjects/themes were selected based on business needs.
- **Motivation and ownership-** the APNET demonstrated leadership right at the beginning, roped in other partners and saw itself taking the lead in managing the event with reduced dependence on ITC.

On the other hand, the experiences from the Southern African programmes provide useful lessons as well. South African participants observed that there was a serious mismatch between the profiles of the buyers and sellers:

- South Africa is a mature market and standards in product quality, value-added content and appearance/aesthetics, were considerably higher than those in the ‘supplier’ countries.
- Buyers found poor supply capacities from participants for their requirements -several suppliers could not offer adequate quantities to support requirements from large buyers. For example, chain stores like Shop Right Checkers require consistent quality goods and large volumes.
- Business participants from the supplier countries were mostly very small enterprises and often had little or no prior experience in exports. They found it very difficult to complete transactions even after receiving business from South African firms. There were problems with documentation, certification and labelling/packaging, which led to rework, delays and rejections despite the basic product being acceptable.
- Supply countries lacked the institutional capacities to train exporters to meet importing country standards.
- Large importers often become impatient dealing with new suppliers.
- The targeting of suppliers needs to be refined, and would benefit from an additional process of ‘filtering’ of participants. While this would considerably reduce the number of ‘matches’ at the events, there is a higher probability of successful meetings, besides a more efficient utilisation of programme funds, which would allow for several, more focused events. There is sufficient standard documentation available from the merchandising practices of large buyers. Therefore, it is possible to ensure in the programme that purchase specifications and supplier registration procedures of several large importers of South Africa can be circulated to prospective suppliers for a self-diagnostic test on the ability to match these requirements.

Poverty Alleviation

Though all ITC interventions target poverty reduction as a goal, the linkage between poverty reduction and the SSTP can at best be indirect. The outcomes from the programme are in the nature of business networking, export orders and trade flows. The link to poverty alleviation is that trade will mean production and manufacturing opportunities in more products, which will mean employment that will in turn have an effect on livelihoods, and therefore result in poverty reduction. Given the inadequate outcome in the first link of this chain, the programme’s overall impact on the remote beneficiaries – the final targets of poverty reduction - is unlikely to be meaningful. However, it can be accepted that events like LatinPharma have the potential to percolate benefits to farmer communities by developing a supply base of medicinal plants resulting from the enhanced export opportunities for formulations.

Gender Impact

Gender issues are not explicitly addressed in the SSTP programme. The unit of intervention is the enterprise, and also because the selection of sectors is based primarily on trade potential. Therefore the inclusion of women beneficiaries is not designed as a feature of the programme.

However, it is understood that women constitute a sizeable share of the production base of several traditional sectors, and any improvement in trade flows leading to expansion of production can be extrapolated into beneficial impact on women as well. The findings on trade flows resulting from the programme do not provide a definite conclusion in that direction.

Observations on Impact Measurement

The Evaluation submits that a direct measurement of results and a feedback system needs to be put in place to produce better indicators of the direct impact of the programme, especially in view of the substantial duration of the programme. An inbuilt, ongoing monitoring element, ideally to be the responsibility of the beneficiary institutions, has been lacking in the programme design. Nor have internal evaluations of ITC included budgets for basic data collection on the sector to correlate outcomes with the outputs from their scheduled activities. ITC and local counterpart institutions have expressed constraints in obtaining feedback from participants.

Illustrative and easy indicators that are not captured in the programme are:

- Participation profile, including presence of large buyers;
- Repeat participations by enterprises;
- Diversification of exports - new countries, new products;
- Trade enquiries converted into business orders;
- Trade orders lost or left unexecuted;
- Losses due to product rejections;
- Losses due to standards non-compliance;
- Costs of compliance; and
- Trade problems solved with inputs from the meetings.

Reluctance in sharing details of the specific experiences and business benefits from the programme has been cited as the main reason for the poor responses. Even the mid-term evaluation recommended that the performance indicator - the value of transactions negotiated - should be changed, as companies are reluctant to provide this information. Based on feedback from participants to a questionnaire and visits to Madagascar, South Africa, Tanzania, Zambia and Zimbabwe, the mid-term evaluation recommended a simpler indicator namely, whether participants of a buyers-sellers meeting would be ready to invest in attending another one.

However, the Evaluation feels that the indicators proposed by ITC are weak in relation to the programme's aims. At the project level too, there are several useful indicators besides the volume of business generated. For instance, they also do not measure the effectiveness of the skills and knowledge transferred by ITC to TSIs and then to enterprises, by correlating these inputs with improved capacity to enter into export trade.

On the other hand, there are additional indicators as illustrated above, which also provide a measure of the usefulness of the programme in enhancing trade opportunities, which can be experienced by participants.

Outreach and Sustainability

Rating: 2.5 on a scale of 1-4

Outreach

The inherent design of the events cannot offer benefits for more than 100-200 participants at a time. However, the outreach from the programme depends to a much larger extent on the ability and motivation of ITC partner institutions in staging such programmes on their own, covering a wider range of sectors, without depending on ITC alone.

Although resource constraints limit the programme's outreach, the SSTP methodologies can be used by other trade networks and product associations to stage similar events on their own. ITC also plans to put its SSTP tools on the Internet for public use, and the outreach of the programme will then be dependent on the initiatives taken by potential users.

Effective web portals and networks have been created in some sectors (e.g. the Leather Line network), which have the potential to rope in a larger number of actors into the programme. However, some networks – such as the Southern African Business Network - are not active in updating trade leads and providing relevant trade information.

The poor results from the email surveys too are an indication of the low outreach of the programme, which cannot even track original beneficiaries less than three years from the participation in the event.

Sustainability

The Evaluation observes that in some sectors, the project has realised some milestones towards technical sustainability.

- There is an increased capacity among some partners to carry on the process with little or no technical dependence on ITC. The information already compiled in the sectors can be updated with the assistance of local consultants and can be used as background for future events. Additionally, the use of ITC matchmaking software can generate appointment schedules.
- Partner institutions in some sectors have demonstrated that they can handle events without dependence on ITC, as with the Printing and Publishing Meeting. The second Buying from Africa for Africa event was also held by regional TSIs on their own initiative, using the processes adopted in the first meeting.
- At the Southern Africa Business Forum in Johannesburg in February 2002, it was proposed that regional bodies take the lead in trade promotion events, and handle these events independently of ITC. To that end, ITC allowed TSIs the use of its

proprietary Matchmaker software. South Africa is at the weaning stage and shall soon graduate from ITC's technical assistance list. TISA is confident of playing the role of a 'regional ITC' in the future, given its responsibilities as the leading TPO in the region.

- These indicate the technical sustainability of the programme based on adequate absorption of skills by ITC partnering institutions.

Financial sustainability is the other key issue for the programme. In Asia, ITC has already introduced the concept of declining financial support, with a phasing out over four years. In the Middle East, funding was totally arranged by the local TSIs - but many of these countries are rich monarchies and cannot be compared with other developing countries. In Latin America, partner institutions have already begun raising contributions from local sponsors and beneficiaries. However, whether partner institutions, particularly in Africa, can partly finance the programme in future is uncertain. These partners need to explore revenue possibilities to provide resources to organise trade meetings based on the SSTP methodology, with participants bearing the costs of the programme through gate fees.

ITC Competence and Comparative Advantage

Though formally launched in 1999, the SSTP was built on ITC's earlier experience in implementing several regional trade promotion programmes.

- ITC enjoys a good reputation for the quality of its customised market information products and tools, especially the product demand and supply studies.
- ITC has more than two decades of experience in the effective management of trade information systems, the development of market information products and the organisation of international trade events. These are key skills that ITC transfers under the SSTP programme to national TPOs and TSIs.

ITC possesses enormous knowledge and experience of all geographical regions, and a network of counterpart institutions in over 170 countries. ITC's involvement and funding support also serves as an incentive to quality participation and involvement by TPOs.

The South-South Trade Programme bundles together several of ITC's competences - trade flow analyses, market/product Maps, export strategy, etc. - and delivers them in partnership with the TSIs.

ITC has a clear comparative advantage¹⁸ in the practical business oriented approach to promoting South-South trade at the level of enterprise. On the other hand, other organisations such as UNCTAD look at South-South Trade in the policy context.

External Constraints and Opportunities

Numerous external factors can condition the programme's success and/or impact, e.g. political unrest, trade barriers or enterprise-level constraints. Some of these issues are

¹⁸ The intended meaning of comparative advantage here is *'who, in current circumstances, is in the best position to do the job'*.

beyond the control of ITC, while others can best be addressed under other capacity development programmes, and not by diluting the SSTP mandate. For instance, when technical barriers were identified in intra regional trade in Africa, the SSTP programme arranged technical seminars to raise awareness of these issues. While such events add to the popularity of the BMSs, there is a limit to which the programme can actually address these issues at the enterprise level, considering the costs associated with various events. The SSTP should flag these issues as they arise; and feed them into the needs assessment stages of other programmes specifically aimed at addressing such bottlenecks.

1.6 Conclusions and Recommendations

Conclusions

General

Overall, the SSTP is a highly relevant programme providing quality service and support consistently to its partners. However, it is challenged in creating larger impacts, in large measure due to the difficult external conditions in some regions, particularly Africa. Many participating countries, particularly Least Developed Countries (LDCs), are at the beginning of the learning curve of trade promotion, and finding the balance between the SSTP's mandates of awareness creation on the one hand, and obtaining business results on the other, is a difficult process. At the same time, the attempt to cover large groups of countries and sectors has borne different results, some of which are satisfactory and most others below expectations.

Despite repeated efforts by ITC barring a few exceptions, its partners have not been able to organise and manage the programme without ITC's technical and financial support. In some cases, the reasons go beyond technical competence into the realm of serious commitment and supply side constraints that are beyond the programme's direct focus.

Improvements made in terms of themes, enterprise selection processes, and financial arrangements as well as diversification of the programme to include other regions and sectors, is expected to produce better results. According to ITC documentation, the business results in the newer events, such as Latin Pharma and Pan Asia events are better than in the evaluated programmes in Africa.

Sector Scope: Diversification/Consolidation

ITC began its regional trade promotion work covering a very wide array, almost 20 sectors. Many of these seem to have gone through a natural elimination process- from poor demand and participation at events¹⁹.

On the other hand, a few - notably leather, books, textiles, and household goods, have consistently received participants' interest and have witnessed several events (in Africa). The programme's responsiveness to the needs expressed at these events has resulted in sustaining the interest of participants and improved targeted delivery of services in these sectors.

Meanwhile, of late there seems to be a fresh infusion of sectors - financial services, information technology, tourism and other business-to-business services, in the SSTP

¹⁹ The sectors included: Vegetable oils; Pharmaceutical products; Books and other printed materials; School supplies; Medical supplies and hospital equipment; Agricultural tools and implements, including hand pumps; Plywood and other building materials; Textiles and clothing; Processed food products; Building materials; Leather products; Agricultural chemicals; Raw materials and intermediate goods; Food and beverages; Services and Humanitarian aid goods, Food and beverages; Services and Humanitarian aid goods. All this appears in the details in the individual programmes.

format. While it is desirable for ITC to incorporate new sectors, unless the regional networks are strong and are willing to share responsibilities and costs, there is a risk of the programme being spread too thin over a large canvas.

Cost-Efficiency

At present, a large share of programme costs is incurred in Geneva, and outlays toward the buyer-seller events are a very small share of the costs, despite the induction of national consultants to undertake the demand and supply studies.

Effectiveness and Outcomes from Buyer Seller Events

The SSTP's targeting of SME participants both on buyers' and sellers' sides is suboptimal, given the realities in the market structures in a number of sectors.

Several participants in the SSTP - especially in the sub-regional trade expansion project - were reported to be non-exporters, and lacked the very basic knowledge of export programmes, according to some buyers who attended these events. The simple prerequisite of being an SME is not a sufficient pre qualification for the SSTP. Additional criteria including export experience and exposure/awareness of export procedures need to be introduced as pre selection filters.

Some partner TSIs do not seem to share ITC's commitment to the programme, which impairs a meaningful outcome from the programme in some cases. In many cases, the national trade promotion body is the partner for the SSTP programme, but does not have the direct contact with the sectors.

The selection of SME buyers in some sectors limits the business potential for participants. For instance, in sectors such as clothing, processed foods, pharmaceuticals and automotive industry, a few large players dominate the global chain and deal with a large number of SMEs located all over the world. Several of these sectors are included in the SSTP. Therefore, the absence of large buyers that have the leverage to alter intra sector trade flows, is significant. Despite the general argument that development assistance is to be targeted only at the disadvantaged, the case for inclusion of large buyers as protagonists in the SSTP is very strong:

- The larger global players dominate trade.
- Trans-border trade data analysis does not reflect the high share of vertical integration and the presence of international production networks, which are dominated by Transnational Corporations (TNCs).
- Increasingly, TNCs are incorporating a social dimension into their procurement practices.
- Merchandising accounts for a large share of costs in large buying operations and ITC's interventions may complement this effort by widening the net considerably.
- Such interventions are already happening in Africa - e.g. the Psi Network, which is a sourcing network from USA sourcing into USA from LDCs, operates in Southern Africa, including Tanzania. Furthermore, instruments like African Growth

Opportunity Act and the free trade arrangements inside Southern Africa provide the legal and market basis for such interventions.

- Large South African buying chains have already become major investors in Africa, developing their supply chains independently of ITC but often within the same sectors targeted by ITC.

Clubbing of Buyers-Sellers Meetings with Other Regional Events

The coincidence of a BMS with a sectoral event is fundamentally a sound idea and has worked well for the printing and publishing sector in the SSTP: BMSs are now a standard event at the Zimbabwe and Nigeria book fairs. By focusing on a homogeneous group of products, these events provide an opportunity for specific and intense prospecting within the sector. Repeat participation of the same entities is also not surprising, as several firms use their participation in international trade fairs as a standard market promotion strategy.

However, the rationale of holding buyers-sellers meetings alongside Regional Economic Summits deviates from the key target audiences of the SSTP, i.e. SMEs. Such events tend to be international networking platforms for influential businesspersons, and are often attended more for status reasons. Nevertheless, the Evaluation understands that ITC does not fund these events from its SSTP budget. Therefore there may be additional networking and advocacy related benefits from clubbing BMSs with high-profile regional events; especially if SMEs get the opportunity to explore linkages with larger firms that may, otherwise, not pursue relationships with them.

Feedback and Monitoring

An in-built, progressive, feedback mechanism at the outreach level is lacking in most ITC programmes. Budgetary constraints are cited as the main limitation. However, the concerns associated with indeterminate outcomes and impacts call for a second look at this aspect of programme design. The utility of feedback is perhaps greatest in mass-contact programmes such as the SSTP, in which beneficiaries are exposed to programme delivery activities in sporadic bursts. All donors interviewed, as well as a large number of TSIs, were very responsive to this suggestion of a feedback system internal to the programme.

For a programme like SSTP, several monitoring indicators can be tracked through the programme without incurring high costs. The effective absorption of skills by the TSIs, and several useful dimensions of business experiences (other than volume and value of orders obtained) can be captured at repeat events in a sector. Such data are not being gathered adequately at present.

Participant Obligations

The field mission experience with tracking beneficiaries has been an unproductive one: of the 168 participants contacted, only 19 responses were received. Not even one national counterpart TSI (from seven countries) replied to the survey. However, the Evaluation met three TSIs on the field mission and received inputs. The Evaluation's assessment is that low response rates, especially from TSIs that partnered with ITC, are indicative essentially of a lack of seriousness about the programme and the evaluation of ITC; and

also a lack of commitment beyond the short-term to such programmes that seek transfer of capacities and concomitant responsibilities. The low response of beneficiaries is indicative of the poor targeting of some events and the perceived lack of tangible benefits from the programme.

Sustainability

10 years down the road, a key issue for programme planning is the exit point for ITC.

At the end of the first phase, it was felt that the regional TSI networks should assume greater responsibility and reduce their technical dependence on ITC. Partner institutions in some sectors are able to organise events without dependence on ITC, as exemplified by the Printing and Publishing Meeting. Similarly, South Africa is expected to be in a position to handle SSTP events with considerably reduced involvement of ITC; it can also percolate its experience to other countries especially in SADC members. Additionally, there is adequate information already available in many sectors to enable preparations for buyer-seller events, without regenerating a base line study to establish trade flow potential. With the use of the Match making software, enterprising TSIs can stage buyer-seller events regularly, using national consultants already trained by ITC under the Programme, where required. In other words, continuing the SSTP intervention is considered technically sustainable.

However, most regional TSIs, especially in Africa, have been unable to attain financial sustainability for the events without ITC support. In many countries, they are unable to self-finance the participation of their officials and participants have not been forthcoming to bear participation costs, even at repeat events.

ITC has begun adopting a declining basis in financial support to events within the same sector. In Asia, ITC has already introduced the concept of declining financial support, with a phasing out over four years. In the Middle East, funding was totally arranged by the local TSIs, - but many of these countries are rich monarchies and cannot be compared with other developing countries. In Latin America, partner institutions have already begun raising contributions from local sponsors and beneficiaries. A beginning in that direction has been made in events in Asia and Latin America.

On the other hand, the financial sustainability of the intervention is assessed to be difficult for the LDCs. ITC partners in these countries are constrained in their ability to sustain these programmes based on participant fees; and will require additional sources to fund such events.

Recommendations

- ITC should seriously examine the sector/theme mix and ensure a reasonable number of repeat events in order to attain critical mass for each sector. This has implications for the number of events/sectors that can be delivered within the overall budget.
- ITC should identify a few countries as regional product theme hubs and hold all the events in the relevant sectors at the same locations, in order to generate high levels of repeat participation. This would increase the capacities of specific TSIs in these

locations to increasingly handle these programmes independently. In turn, this would reduce the share of Geneva-based costs in the programme and result in improvements in cost-efficiency.

- ITC should also appraise the actual level of commitment of its partner TSIs to the programme, and consider sector-specialised TSIs as partners wherever practicable.
- While selecting SME beneficiaries for events, export experience and assessed export-readiness rather than enterprise size should become prime criteria for the programme. Entities that have no prior experience with exports should first be trained for export readiness under other, including but not restricted to, ITC programmes before participating in BMSs.
- ITC should consider possibilities to integrate sector based buyer-seller events, with supplier development programmes of larger companies, and target at least a few large buyers as participants. Linking up with supplier development programmes can enhance the effectiveness of the SSTP. Unlike in the present format where most buyers do not visit the event more than once, in a Supplier Development Approach, buyers will have a continuing interest in supporting the programme, as it widens their supply base, and supplements their own efforts and budgets for vendor development. This idea is indirectly emerging in some countries. For example, in the upcoming Cosmetics Sector Programme of South Africa; where leading Canadian brands are being brought in as partners to help develop the South African cosmetic industry to export to developed countries. Similar attempts are visible in the Export Poverty Reduction Programme in Kenya, with Del Monte as a partner.
- A small feedback budget should be created in the SSTP budget. This would be to enable TSIs to conduct post event surveys and track progress with a large number of participants. It would bring into TA programmes the first stream of impacts at the enterprise level. An alternative would be to set up a monitoring unit for the programme, as a service provider working closely with ITC rather than being located under beneficiary TSIs.
- A list of performance indicators - as proposed in the Impact section - should be developed and used to draw baselines and track progress between subsequent buyer-seller events in the same sectors. These can be simple indicators and need not use confidential business information.
- Because technical assistance or opportunities are provided at no or minimal cost, preconditions for participation should include enterprises to assume certain minimum obligations, such as:
 - Registration in the appropriate sector network portal created by the programme, and commitment to respond to periodic feedback questionnaires;
 - Undertake to report specific constraints in implementing business initiated at the events; and
 - Undertake to report change of address in order to be listed for future events.
- Declining funding support should be the standard formula for SSTP events in all regions, and all repeat participants should fully bear all costs of their participation at events.

- Sub-Regional Focus: In a large region like Africa, a more efficient allocation of funds and better targeting of activities could be achieved by localising the programme at the level of four or five sub-regions, building on geographical contiguities as well as sub-regional economic partnerships.

Annexes

- Annex 1: Case Study: Sub–regional Trade Expansion in Southern Africa
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Annex 1: Case Study Sub-regional Trade Expansion in Southern Africa

Country/region:	Southern Africa
Project number:	RAF/61/71
Project title:	Sub-regional Trade Expansion in Southern Africa
Financed by:	Government of Switzerland
Budget, Phase I	USD 1,326,000
Starting date:	January 1999
Duration phase I	Four years

Description

In January 1999, ITC launched the project “Sub-regional Trade Expansion in Southern Africa”.

The project was formulated at the request of the South African Government, and was based on extensive consultations with business organisations in Southern Africa. It aimed at achieving two objectives:

- To assist companies in the region in taking advantage of market opportunities in South Africa, *inter alia* through the organisation of buyers-sellers meetings;
- To create a permanent networking mechanism to facilitate sub-regional trade expansion on a continuous basis.

The Swiss Government funded the initial phase of the project with a total assistance of USD 1.362 million. Subsequently, based on an evaluation in 2001, a second phase of the project was drafted covering a three-year period (2003-2005) and entailing USD 1.048 million. However, due to the lack of donor support this second phase was not initiated.

Objectives

The project document identifies two immediate objectives with corresponding indicators of the project outcome.

- Immediate objective 1: To enhance market opportunities in South Africa for products available in the sub-region, and to improve marketing techniques enabling sub-regional enterprises to take advantage of such opportunities.
Performance indicator: At least USD 50 million of new trade transactions negotiated between regional exporters and South African importers.
- Immediate objective 2: To create a networking mechanism to facilitate sub-regional trade expansion on a sustainable basis.
Performance indicator: A programme of sub-regional trade promotion activities by national business organisations.

Activities

The project started in 1999, with the undertaking of a trade flow analysis, the selection of the counterpart organisations in the exporting countries, and the preparation of a product

selection workshop in Johannesburg. It was attended by representatives of TSIs from the region. It was agreed that the project would focus on five priority product groups:

- Fish and fish products,
- Wood and wood-based building materials,
- Exotic food and beverages,
- Leather products, and
- Textiles and clothing.

Accordingly, BMSs were scheduled in November 1999 in Cape Town for fish and fish products; in May 2000 in Johannesburg for wood and wood-based building materials; in November 2000 in Johannesburg for exotic food and beverages; in June 2001 in Johannesburg for leather, and in July 2002 in Durban for textiles and clothing.

The preparatory stages before these meetings followed the ITC three-step methodology: (i) a statistical identification of possible trading potentialities between the exporting countries and South Africa; (ii) the selection of countries offering export potential and the preparation of supply surveys in those countries and of demand surveys in South Africa; and (iii) selection of enterprises for the BMSs. In many countries, consultants, under the guidance of ITC, were appointed to prepare the survey in view of inadequate capacities within the counterpart institutions.

The project also set up a network of trade institutions in the region, in the form of the “Southern Africa Business Forum” of TSIs, representing 13 Southern African countries. The project further provided resources to set up a web portal to share regional market information and business opportunities in the sub-region. The Association of SADC Chambers of Commerce and Industry hosts this site.

Outputs

By and large, ITC has provided all agreed outputs and activities as scheduled and within agreed timelines and costs.

A few specific outputs are highlighted below under their respective objectives:

To enhance market opportunities in South Africa

ITC has produced all outputs in accordance with the agreed targets on the preparation of demand/supply studies; appointment of consultants; and hosting of buyer-seller events in the five identified sectors. A large number of enterprises (approx. 300) took part in these events.

ITC reports that participants’ feedback indicates the meetings were useful and met their expectations. In addition to providing a platform for negotiating direct import/export transactions, the meetings revealed the considerable potential for other forms of business co-operation, such as investments and joint ventures.

To identify specific product-sector-related constraints to trade expansion

After the BMSs, ITC carried out missions in Tanzania, Zambia and Zimbabwe to follow-up on the participation of the companies from these countries in the buyers-sellers meetings. These missions provided useful inputs for enterprise-specific assistance activities, notably in the areas of standards compliance. Specific needs were identified in the wood products sector and fisheries.

To create a networking mechanism to facilitate sub-regional trade expansion

ITC organised the Southern Africa Business Forum for TSI representatives in the sub-region, to consider measures for the strengthening of co-operation arrangements, to ensure a continuous exchange of information on trading opportunities; and to provide a permanent facility for the undertaking of market development activities in South Africa.

Following the recommendations from the event, the project was developed jointly with the Association of SADC Chambers of Commerce & Industry, an e-based business networking system in Southern Africa, and “The Southern Africa Business Network” portal. ITC also provided support to selected national TSIs in the development and delivery of e-based support services. Corporate websites were created for the Angolan Chamber of Commerce and Industry, the Export Board of Zambia and the Zimbabwe National Chamber of Commerce.

During the forum, country delegations reconfirmed their commitment to work closer together in order to better assist their business communities in exploring intra-regional trade opportunities. It was recognised that trade expansion depends not only on tariff reductions but also on the provision of adequate and effective trade support services. Participants shared the vision that the private sector in Southern Africa should assume a more pro-active role in regional trade integration efforts. In particular, it was proposed that regional bodies, such as Association of SADC Chambers of Commerce and Industry could stage trade promotion events to promote intra-regional trade.

Field Mission Observations

Relevance

The design of the programme was highly relevant to the needs in the region. In 1994, after democratic elections in South Africa, international sanctions were lifted and normal trading relations were re-established with all African countries. South African exports to the rest of Africa increased very rapidly. South Africa also became a member of SADC and by 1998 the trade balance between South Africa and the other SADC countries was about 10 to 1 in favour of South Africa.

The SADC countries, including South Africa, wanted this trend reversed, holding that this situation was not in their long-term interest. Neighbouring countries had not been taking advantage of the market opportunities in South Africa, created by the SADC Trade Protocol. As a result, ITC designed a three-year technical co-operation programme with the overall objective of increasing exports from the region to South Africa.

The challenges facing the project in its first phase were to: (i) determine the reasons for low level of exports from SADC countries to South Africa; (ii) identify possible new trading opportunities; (iii) create a situation whereby these opportunities could be translated into actual trade; (iv) develop a networking mechanism to facilitate regional trade expansion on a sustainable basis; and (v) contribute to the removal of non-tariff barriers hampering the development of intra-regional trade.

Efficiency

Beneficiaries appreciated ITC's comparative advantage in organising trade promotion events.

While it can be argued that buyer-seller events could well be organised by chambers of commerce and industry bodies themselves - as is the case in several countries -, ITC has a unique specialisation in the design and organisation of BMSs. ITC also manages them like clockwork.

- The matchmaking programme and the processes in the BMSs are much better than similar events organised by local chambers of commerce and industry associations.
- The demand and supply surveys are highly useful and have a long shelf life even after the events. The quality of supply surveys has improved in some countries, though some countries still require external consultants to produce these surveys.
- The formats of the buyer-seller events are replicable and can be easily transferred to TPOs to host similar events on their own initiative.

The importance of a match making process as well as adequate sensitisation through demand and supply profiles - key features of the ITC approach - has been recognised.

Attempts by other bodies to organise similar BMSs have not been successful, due to serious mismatch in the profiles of buyers and sellers: In an event arranged by the Johannesburg Chambers of Commerce, in which over 100 large South African companies participated, while South African participants were from manufacturing industries, participants from several other countries were artisans and crafts persons.

Cost-efficiency

The first phase entailed a budget of USD 1.362 million, most of which went into technical preparatory work on organising the programme in various countries and in preparing demand-supply surveys - USD 390,000 was spent for national consultants, in addition to ITC internal advisors costs. The final events, the five buyer-seller events themselves, in which over 300 African enterprises participated, accounted for only USD 50,000, less than 4% of the programme budget.

In general, for a transactions-based programme, the SSTP has a high share of preparatory costs. The absence of sector-specific enterprise databases and inadequate capacities in TSIs to undertake reliable surveys, justified the use of national consultants and facilitators in the first phase. Additionally, these surveys resulted in a national baseline with respect to the selected sectors, and were expected to have a shelf life beyond the buyer-seller events

- they can be used for preparing subsequent events as well as similar events in other countries. This does explain the high share of preparatory costs in the first phase.

A good indicator of successful transfer of skills under the programme would be the progressive reduction in the overall programme budgets, especially under the heads of ITC support costs, without a reduction in the coverage of countries or the number of buyer-seller events.

To manage the SSTEP programme activities, local TSIs should have researchers to undertake new product surveys, profile and select participants for the events, and then organise the events efficiently. At a higher level, they must be able to analyse trade trends and identify new themes based on such analyses. These were indeed the skills ITC had targeted to establish in the TSIs.

Ideally, if national TSIs were able to conduct these events with little or no support from ITC, the same deliverable outputs from the programme would have cost only USD 295,000 for the 40 surveys and the five BMSs held in the first phase. Therefore, the value of the technical assistance component delivered by ITC under phase I can be imputed at nearly USD 1.067 million (programme budget less external deliverable output to final beneficiaries).

Effectiveness

Sector Selection

To an extent, the selection of sectors was not premised on market diversification of existing exports, but on new market development to meet the needs of a new market.

The selection of sectors for the BMSs is usually based on trade potential analysis, using data provided by ITC as well as consultations with the participating TSIs from all the countries under the programme. Because there was no prior history of trade with South Africa, the theoretical supply potential was 'enormous', as per the formula used by ITC. Also, the partner TSIs proposed sectors based on 'interest in supplying products' and not on confirmed demand from buyers. However, with the exception of fish products from Mauritius, there were no significant existing exports of the selected products from most countries. Thus South Africa was to be the first export market for several countries in the products selected for the events.

As a result, the supplier side constraints were not adequately highlighted in the supply surveys, resulting in a serious mismatch between buyer needs and supplier capabilities.

Given that trade promotion budgets were low in most countries, and there were inadequate capacities at the TPOs, the expertise of ITC in organising such events as well as financial support - bearing the entire participation costs for TSIs and partially for enterprises - made the BMSs a unique platform for suppliers.

The first BMSs were conducted soon after South Africa had had its democratic elections. South African enterprises, which were earlier under several restrictions to transact

business with most countries, flocked to the BMSs, finding it a very exciting opportunity to meet up with businesspersons from Africa. Similarly, participants from other countries had expectations of being able to enter the South African market.

The initial meetings in all the 5 sectors were reported as highly successful, inasmuch as they were introductory meetings, and opened up prospects for transactions over the next few months among participants.

However, enthusiasm of South African business apparently dropped after the initial stages, and organisers had to struggle to get a meaningful participation in subsequent events for the following reasons:

- BMSs in the same sector lose their flavour.
- Donors and event organisers would have liked to see large-scale participation by buyers. However, numbers can be less important than the profile of participants at the events.
- As in all markets, a few larger players hold a big share of trade in a sector. A few players dominate the retail markets in South Africa, and all of them had attended these meetings.
- Most players had attended the first and perhaps second BMSs in their sectors, and benefited from the demand-supply studies and contacts with participants. They perceived little utility from further similar events in the same sector.

Targeting of Participants

The programme's targeting SMEs as beneficiaries is well intended. However, in order to become more effective, the programme design needs improvement in tightening the selection of participants.

The South African participants observed that there was a serious mismatch between the profiles of the buyers and sellers:

- South Africa is a mature market and standards in product quality, value-added content and appearance/aesthetics were considerably higher than those in the 'supplier' countries.
- Buyers found poor supply capacities from participants for their requirements -several suppliers could not offer adequate quantities to support requirements from large buyers. For example, chain stores like Shop Right Checkers require consistent quality goods and large volumes.
- Business participants from the supplier countries were mostly very small enterprises and often had little or no prior experience in exports. They found it very difficult to complete transactions even after receiving business from South African firms. There were problems with documentation, certification and labelling/packaging, which led to rework, delays and rejections despite the basic product being acceptable.
- Supply countries lacked the institutional capacities to train exporters to meet importing country standards.

- Large importers often become impatient dealing with new suppliers.
- The targeting of suppliers needs to be refined, and would benefit from an additional process of ‘filtering’ of participants. While this would considerably reduce the number of ‘matches’ at the events, there is a higher probability of successful meetings, besides a more efficient utilisation of programme funds, which would allow for several, more focused events.

There is sufficient standard documentation available from the merchandising practices of large buyers. Therefore, it is possible to ensure in the programme that purchase specifications and supplier registration procedures of several large importers of South Africa can be circulated to prospective suppliers, for a self-diagnostic test on the ability to match these requirements.

Trade and Investment Linkages

South Africa has emerged as the most important foreign investor in southern Africa, representing more than 80% of FDI in the region. Given the strong linkage between trade and investment, there is potential for improving on the purely arms-length trade approach as used in the programme. Adopting an investment-cum trade approach, whereby there is a greater stake and interest on part of South African buyers, could do this.

However, the investment regulations in several countries allow large companies to set up owned operations/subsidiaries, which leaves little scope and interest to enter into buyer-seller relationships with other, smaller players. Large chains from South Africa have been operational in some countries, with their own captive sourcing and merchandising operations. Here again, the programme fails to match the needs and priorities of the larger buyers, who account for a large share of imports into South Africa.

Under these conditions, the maximum benefits of the programme can accrue only to medium-sized South African companies that may be interested in sourcing from within the region. But these companies do not have the financial capacity to train and develop suppliers over a long-term, nor do they have the organisational resources to enter these locations directly to set up sourcing operations.

In this regard, it may be necessary to reconsider the emphasis on selecting purely SME participants and new exporters. It would be more appropriate to select ‘export-ready’ enterprises, irrespective of their size. Alternatively, the programme could develop variants, such as (i) a cluster approach built around one specialised product line specified by a target group of buyers; and (ii) developing suppliers that are located contiguously, so as to offer appropriate volumes, as well as (iii) the facility of close monitoring under a lead supplier or a buying agent identified under the programme. The entire apparel export industry in several countries was developed on these lines in the last three decades, with initiatives taken by the large international buying houses.

Capacity Building of Local Partners

A major outcome of the programme is that ITC has transferred skills and enhanced the capabilities of one of the local partners Whitehouse & Associates. Whitehouse & Associates has arranged 12 BMSs since 1992. On the basis of the ITC experience, Whitehouse & Associates has been recognised as a key resource in the region for trade promotion strategies. It is the official agent of Mauritius Development Authority in South Africa. It is also the advisor to the European Union - South African investment promotion project; and it continues to be involved with other donors' activities in the region, relating to regional trade and investment development.

At the same time, officials at TISA, the national trade promotion body in South Africa admit that the programme's full potential could not be converted. This is partly due to internal inadequacies at TISA, and the officials at TISA did not play their due leading role in mobilising, selecting and training enterprises for the programme. There is acceptance that targeting of enterprises has been unsatisfactory, and even conceptual errors have been made. For example, as in the Buying from Africa for Africa report, where suppliers were required to complete a 242-page document to register with some agencies, and had to register with each agency separately!

South Africa is on course with its national trade strategy and trade information system - with ITC support. This has improved its internal organisation and prepared it for the tasks and issues it needs to take up in expanding South Africa's trade in the region as well as outside. TISA has set up specific performance targets as the National Trade Promotion Body, benchmarking with international TPOs.

Officials felt that there is now a better understanding of internal constraints, and lessons from past failures in regional trade promotion activities have been learned well. TISA is now in a position to support these efforts effectively. As a result, TISA would be in a position to absorb and adapt ITC's knowledge of organising BMSs, and would be able to handle future missions on its own over a period of one or two years.

South Africa is now at the weaning stage in ITC's activities, and this in itself is a sign of recognition of its improved capacities over the recent years with ITC support. This makes TISA a better regional partner for trade promotion activities, where South Africa has a major responsibility as well.

Impact/Outcomes

In 2001, ITC undertook an internal mid-term evaluation, which recommended an extension of the project.

The ITC evaluation document stated that through the use of tools such as supply/demand surveys and buyers-sellers meetings, the project has contributed to increased awareness of the business opportunities offered by the South African market. More importantly, South African companies are gradually accepting the neighbouring countries not only as a market for South African products, but also as a source of supply.

ITC considers that the project has laid the foundations for an e-based business networking system in southern Africa, with the creation of the Southern African Business Network; and the launch of a trade portal for exchange of information on intra-regional trading opportunities. Yet further work needs to be carried out to enhance the capacity of the Association of SADC Chambers of Commerce and Industry membership to collectively stage market development activities in the region.

On the other hand, the performance indicators relating to trade transactions have not been measured in the project. The project specified 'at least USD 50 million of new trade transactions negotiated between regional exporters and South African importers' as a performance indicator for the project.

Despite having a clear, quantitative indicator of the Project's performance, no measurements of trade flows among participant countries seem to have been attempted.

Instead, ITC's internal evaluation of the Programme (2001) touches on soft gains:

- "...The overall conception and design of the project is sound and corresponds to a real technical co-operation need...the implementation of the project to date has been remarkable with inputs and activities of good quality and delivered on time... In addition, the project has been very successful in establishing synergies with other ongoing ITC projects in the region as well as with other development agencies working in the same area.
- ...The results of the buyers-sellers meetings go beyond networking and the creation of new trade flows; they also concern identification of trade constraints, technology transfer, needs assessment for supply side improvements as well as possible investment promotion opportunities and the creation of sector trade associations.
- ...The project has initiated a process. It has established a network and demonstrated a methodology. However, this effort must continue over a certain period of time. Not only will it be necessary to organise more buyers-sellers meetings in many other product groups... but also the project could focus on ways to address some of the constraints that have been identified during the buyers-sellers meetings and to raise awareness on those constraints..."

Based on the evaluation, a second phase of the project was also proposed. It was justified on the need to address problems that were encountered in the first phase concerning market development (non-tariff barriers in the sub-region), enterprise competitiveness, and lack of effective business networking for trade and investment promotion. However, this second phase was not implemented due to lack of donor support.

Monitoring and Feedback System

The Evaluation submits that a more direct measurement of results and a feedback system could have produced better indicators of the direct impact of the programme, especially in view of the substantial duration of the programme. An inbuilt, ongoing monitoring element, ideally to be the responsibility of the beneficiary institutions, has been lacking in the programme design. Nor have internal evaluations of ITC included budgets for rigorous data collection on the sector to correlate outcomes with the outputs from their scheduled activities. ITC and local counterpart institutions have expressed constraints in obtaining feedback from participants, and encountered very low response rates to any questionnaire campaign.

Reluctance in sharing details of the specific experiences and business benefits from the programme has been cited as the main reason for the poor responses. Even the mid-term evaluation recommended that the performance indicator - the value of transactions negotiated - should be changed, as companies are reluctant to provide this information. Based on feedback from participants to a questionnaire and visits to Madagascar, South Africa, Tanzania, Zambia and Zimbabwe, the evaluation recommended a simpler indicator namely, whether participants of a buyers-sellers meeting would be ready to invest in attending another one.

The Evaluation has serious concerns on the substitution of trade performance indicators with 'willingness to pay' indicators.

The newly proposed indicators are much weaker in concept; under-aspiring in character; and worse, dilute the project's aims substantially. The project aim is to enhance trade among countries in the sub-region and not to enhance trade-show participation by enterprises. The new indicators will only measure the relevance of trade events for the target beneficiaries, and not measure their readiness and competitiveness to trade in the region. They also do not measure the effectiveness of the skills and knowledge transferred by ITC to TSIs and then to enterprises, by correlating these inputs with improved capacity to enter into export trade.

On the other hand, there are additional indicators, which also provide a measure of the usefulness of the programme in enhancing trade opportunities, which can be experienced by participants.

Illustrative and easy indicators that are not captured in the programme are:

- Overall trend in participation;
- Participation profile, including presence of large buyers;
- Repeat participations by enterprises;
- New business contacts built through subsequent BMSs;
- Diversification of exports - new countries, new products;
- Trade enquiries converted into business orders;
- Trade orders lost or left unexecuted;
- Losses due to product rejections;
- Losses due to standards non-compliance;
- Costs of compliance; and
- Trade problems solved with inputs from the meetings.

The Evaluation also observes that the arguments for dropping the older performance indicators on grounds of beneficiary reluctance are inadequate, as there are established methods of eliciting appropriate information for gauging the programme impact without stepping over proprietary and confidential bounds, and indeed, without asking for transaction values. Further, the Evaluation's experience with questionnaire surveys used

in the evaluation suggests that at least some beneficiaries are willing to share views candidly, and to provide useful information without stating actual data.

During the field mission, the Evaluation sent a simple - less than one page - questionnaire to 101 participants (buyers, suppliers and TSIs), details of which were received from ITC, polling only the nature of benefits they obtained or perceived from the buyer- seller events. Most emails bounced due to incorrect or old addresses and it is conceivable that several that went through may have been filtered as spam mail. However, the responses were prompt from several participants and indeed insightful in many cases. Besides, many enterprises that were interviewed personally, answered the questionnaires by mail as well.

Replies to the Questionnaire

BSM -Textile & Clothing-July 16-17, 2002

The summaries of responses to the questionnaire have been tabulated below.

Table Annex 1.1: BSM - Textile & Clothing-July 16-17, 2002

Perception of the utility of the Buyer-Seller Programme	Scores on scale 1(none) to 4 (significant) of five responses
Increase in business	2,1,1,1,1; mean score 1.2
Introduction of new suppliers/buyers	1,1,1,2,1; mean score 1.2
Useful information on buying procedures	2,1,1,1,1; mean score 1.2
Quality of supply and demand surveys	1,1,1,2,1; mean score 1.2
Awareness raising of problems, bottlenecks	1,1,1,2,1; mean score 1.2
Overall	2,1,1,1,1; mean score 1.2

Total Sent: 59; Responses Received: 5

BSM-Exotic Food & Beverages 28-29 Nov 2000

The summaries of responses to the questionnaire have been tabulated below.

Table Annex 1.2: Summary responses - BSM Exotic Food & Beverages 28-29 Nov 2000

Perception of the utility of the Buyer Seller Programme	Scores on scale 1(none) to 4 (significant) of four responses
Increase in business	1,2,1,1; mean score 1.25
Introduction of new suppliers/buyers	1,2,1,2; mean score 1.5
Useful information on buying procedures	1,1,1,2; mean score 1.25
Quality of supply and demand surveys	1,1,1,2; mean score 1.25
Awareness raising of problems, bottlenecks	1,2,1,2; mean score 1.5
Overall	1,2,1,1; mean score 1.25

Total Sent: 42; Responses Received: 4

The experience from this evaluation suggests that there are other factors to be noted as well:

- The national counterpart TSIs should have played a more proactive role in studying the impact from the events. There are three actions that should have been the primary responsibility of TSIs for each of the buyer-seller events:
 - Maintain reliable and up-to-date database on participant enterprises;
 - Track trade trends for the programme's sectors and product groups from the national statistics; and
 - Poll feedback from all participants through e-mail or snail-mail on the experiences and gains from donor-sponsored events, without violating proprietary limits.
- None of the counterpart institutions met by the Evaluation had taken this as their responsibility, and cited financial constraints as the principal reason. However, the programme budgets provided for international as well as local consultants, and the Evaluation feels that there was sufficient scope for including costs for a feedback survey, as part of the preparatory activities preceding the events. Demand supply surveys have been budgeted at USD 2,500 per sector, and enterprise level surveys could be budgeted at the same level. Even if these surveys were carried out only once every two years, the additional cost would be more than justified if they pinpoint (i) the contribution of the programme to improving the export performance of participant enterprises, and (ii) to the enhancement of regional trade.
- The Evaluation observed that, by and large, business enterprises have a positive feeling for the quality and the efficiency of the buyer-seller events themselves, and would like to see them continue, irrespective of the outcomes and gains for their own businesses. Several enterprises reported positive experience with ITC's information products and technical seminars as well. This positive equity enjoyed by ITC can certainly engender a better response to a formal feedback system aimed at improving service effectiveness. In addition, the Evaluation feels that conclusions on the poor feedback from participants are premature.
- Participating enterprises come to their first BMSs either because they are pre-qualified or because their costs are subsidised, but they come to subsequent events only because they perceive a continued benefit from participation. In the case of donor-funded programmes, agreeing to report on their own results periodically is the least that could be expected from such direct beneficiaries. Therefore, it would be logical for the national counterpart institutions to stipulate contractually that participants agree to report on their post-event results, as a condition for participation and for deriving benefits from a donor-funded project. This pre-confirmation feedback can be made a standard pre condition for all repeat participants; it would also assist in better targeting of the participants, based on actual supply records.

Discussions with ITC staff as well as donor organisations confirm the feasibility of this suggestion, at least for repeat participants.

An overriding argument for a feedback system in this programme is found in the programme document itself. ITC identifies three problem areas to be addressed in the Sub-regional Trade Expansion Programme and Intra Africa Trade Promotion

programmes: market development; enterprise competitiveness, and capacities of TSIs. While buyer-seller events and supply surveys can throw light on border-out and border measures, the enterprise competitiveness aspects cannot be captured without a survey of participant enterprises.

It is important for ITC to determine and list the reasons why SMEs participating in the events did not end up exporting to prospective customers identified at the buyer-seller events, as has often been the case. These reasons extend beyond standards compliance, which was identified by ITC to be the principal barrier in fish products and wood products. The reasons can often be very basic - lack of understanding of letter of credits, inexperience in preparing shipping documents, etc., which were indeed the case for trade with South Africa. Therefore, it is hard to appreciate how the programme proposes to identify and prioritise enterprise assistance needs without a mass survey of their experiences with exports, many of which may relate to internal readiness for exports.

On another dimension, once identified, enterprise-competitiveness issues cannot be undertaken within the scope of a transaction-focused programme like the SSTP, and need to be addressed through other interventions. Therefore, enterprise feedback is critical even to fine-tune and appropriately space buyer-seller events within the SSTP programme, while channelling enterprise level support in identified deficiency areas through other programmes.

Finally, the Evaluation feels strongly that stakeholders, especially beneficiaries, need to assume greater accountability for technical assistance sought and received from the donor community. Also, based on several evaluation reports studied in the mission, it appears that even donors and ITC have tended to be soft, praising the small positives, while condoning larger (reconciled as insoluble?) issues, meanwhile continuing support on the same conditions as before. This has resulted in an incremental approach in the SSTP, which has not seen any major design change for more than 15 years. That it is an endorsement of the programme's effectiveness would need to be borne by sector level impacts, which are difficult to measure using the programme's own instruments.

With the pressure on donor resources, it is increasingly necessary to ensure efficient use of funds, to respond to changing needs and improve the targeting of participants and interventions. This is of most concern in Africa, which continues to lag in trade development. It would be in their own interest for beneficiaries to consider a monitoring of aggregate results from all technical assistance received in a sector or area of capacity development, to justify continued support for further projects from the same or new donors.

Therefore, resistance or reluctance to procure or provide feedback on the effects of donor-assisted technical co-operation cannot continue to be a prerogative. Donors may well prevail over other stakeholders on having inbuilt - but objectively administered - monitoring mechanisms, as a precondition to funding programmes.

All the above arguments support the serious consideration of a feedback and monitoring system as part of the project design in the SSTP, as an impact measurement tool for intra regional trade promotion. Countries and sectors that have hosted the largest number of events under the programme would be the best to begin with a monitoring system.

Annex 2: Case Study South-South Trade Promotion Programme - Africa

Country/region:	Africa
Project number:	RAF 47/51
Country/region:	Africa
Financed by:	Government of Netherlands
Phase I	USD 1,048,000
Phase II (2002)	USD 255,000
Starting date:	1992

Intra African Trade Promotion

This programme is the original precursor to the SSTP Programme. It aims at inducing African business partnerships across national borders, to expand regional trade, as an intermediate step towards integration of African enterprises into the global economy.

Objectives

According to the project documents, the overall objectives of the Intra Africa Trade Promotion were:

- To make the African marketing environment more transparent, and provide information on a vast array of tradable products in the region;
- To assist African companies in taking advantage of existing business opportunities within Africa; and
- To contribute to the long-term process of economic integration in Africa.

The programme design consists of three elements to attain these objectives:

- Establishing business linkages across borders in Africa in a variety of product sectors.
- Assisting regional institutions and organisations in staging specific intra-African trade promotion events (BMSs), using ITC's already established methodology for identifying trading opportunities and translating them into transactions.

At the same time, the project partners with the World Economic Forum are to organise trade promotion events on the sidelines of regional economic summits.

Sub-programme 1: Improving operational performances of African enterprises and their competitiveness

Under this sub-programme, the buyers-sellers meetings that will be organised and the materials/tools developed will allow players in a sector to network, acquiring an insight into business practices across regions and sectors, and obtaining strategic business information, ultimately enhancing enterprise competitiveness. The programme events were characterised by:

- Tailor-made seminars to improve expertise in specific (including technical) topics and strengthen export management;
- Matching enterprises with a view to enhance their competitiveness in global markets, including development of a Match Making software;

- Distribution of reference material for firms to use during and after the trade promotion events.

Sub-programme 2: Building institutional capacity for sustaining the process of African market integration

The sub-programme targets partnering with African TPOs and specialised associations, with the aim of raising awareness of the potential of intra-regional trade promotion, and exposing them to ITC methodology and ITC-developed tools.

Activities

Since 1992, under various products, ITC has conducted more than 50 buyer-seller events to date, in more than 20 product groups. Very often, these events have been conducted involving the same local institutions and partners. Some countries have played host to several such events, and in many sectors, more than three events have been held in these years. All these projects follow the standard ITC methodology, and an activity cycle encompassing trade flow analyses, demand/supply surveys, and hosting buyer-seller meetings under sector or product themes.

The sectors covered by these programmes were: Vegetable oils; Pharmaceutical products; Books and other printed materials; School supplies; Medical supplies and hospital equipment; Agricultural tools and implements, including hand pumps; Plywood and other building materials; Textiles and clothing; Processed food products; Building materials; Leather products; Agricultural chemicals; Raw materials and intermediate goods; Food and beverages; Services and Humanitarian aid goods.

Among these, most buyer-seller events have been held in printing & publishing, foods & beverages, leather products, and humanitarian aid supplies, each having realised more than five events during the past 10 years in various regions of Africa.

Relevance

The integration of developing countries into the world economy is a gradual process, and a number of intermediate business development actions may be required before enterprises from the South can be competitive on a global scale. The New Partnership for Africa's Development postulates the promotion of trade as an engine of economic growth and development for African countries. The New Economic Partnership for Africa Development emphasises regional economic integration processes in order to create and widen market opportunities for Africa, thereby reinforcing the timeliness and importance of the objectives on which the Intra Africa Trade Promotion programme is based.

The opportunities for intra-African trade are considerable for a wide range of products, from foodstuffs to building materials, from medicines to machine parts, from consumer goods to manufacturing inputs - and yet intra-African trade still amounts to a mere 10% of the region's total foreign trade.

Africa has most of the world's mini-states, which severely limits economic development options, and it is now generally recognised that improving regional integration is an essential condition for sustainable economic progress of the African continent as a whole. The process of economic integration is trade-led and can be effectively stimulated by initiatives aimed at expanding intra-African trade.

Efficiency and Outputs

Throughout the programme, ITC produced the agreed outputs and activities as scheduled.

The outputs targeted at business enterprises were: trade flow studies for intra regional trade potential events in several sectors; supply and demand surveys; company and product profiles (with an audit process); training and advice to exporting enterprises and TSIs on specific export-related topics; and the organisation of the BMSs themselves.

The outputs targeted at capacity development of TSIs were: development of a trade portal on the project, and training of staff in the use of ITC methodologies and tools to conduct similar events with reducing dependence on ITC.

Cost-efficiency

As in the case of the sub-regional trade expansion programmes, the budgets, even for 2003, are very heavy for ITC located costs, with nearly USD 149,000 allocations for ITC advisers and international consultants, out of the total budget of USD 255,000. At the same time, costs for deliverable outputs in the form of supply surveys and training of TSIs accounted for only USD 49,000.

Impact/Outcomes

ITC's assessment of the project's performance to date is that:

- African countries have provided evidence both of a closer engagement with the processes of establishing a multilateral trading system, and of recognition of "trade", as an important contributor towards economic growth and development.
- The buyers-sellers meetings organised by the programme are systematically contributing to the emergence of an intra-African business culture, as evidenced by the fact that intra-African trade is now growing faster than the region's trade with the rest of the world -, and yet the potential for further market expansion remains far from being fully exploited.
- However, two main factors continue, and will continue to negatively impact this process for time yet to come. The first relates to the persisting anti-African bias prevalent among many African consumers, which links directly to the awareness issue. The second results from continued imperfections in attaining full transparency of the African business environment.

Therefore, it would be reasonable to assume that at least in Africa, where the bulk of activities under these programmes have been implemented, ITC's counterpart institutions in the developing countries have had sustained exposure to the programme, through

several buyer-seller events, including several in the same sector. Given that the Intra African Trade Promotion programme started in 1987, there is a sizeable time horizon to consider the outcomes of the project at the sector level.

In this light, at least in these sectors, awareness of trade opportunities is not a sufficient indicator of the programme's impact, and the results also need to be analysed from the following perspectives:

Trade flows:

- Growth in intra regional trade in sectors focused under the programme;
- Diversification of products and markets; and
- Business generated by participating enterprises.

Capacity of TSI partners (with minimal assistance from ITC) to undertake:

- Trade flow analyses using ITC tools;
- Preparation of demand/supply surveys;
- Targeting and prequalification of enterprises for participation;
- Organising BMSs; and
- Follow up, feedback and course correction.

Business Networks:

- Participation trends in BMSs;
- Networks and partnerships among TSIs at the sector level; and
- Networks and partnerships among TPOs.

Such an analysis has been attempted for four sectors:

- Printing and Publishing;
- Food and beverages;
- Leather goods; and
- Humanitarian aid supplies.

Printing and Publishing

ITC organised the events in this sector with the support of the APNET, and the first event was organised in Mauritius. The products covered by the event include books, periodicals, graphic materials, desktop originating and design, industrial inks and paper/board. Since then, at least six events have been held under this theme, with consistent participation from an increasing number of countries.

Trade Flows

There is clear evidence of an increase in intra African book trade as a result of the events undertaken in the programme, as found from the APNET.

The response from APNET to the Evaluation's request for information on trade trends is reproduced verbatim.

“APNET is grappling with the difficulty of getting statistics off its member publishers. We are aware that a lot of trade has been taking place in Africa since the co-operation of ITC with APNET from 1993 to date. The introduction of buyers-sellers meetings has helped the African book industry to accelerate trade across borders and through licenses. Those who have participated in different sessions of the buyers-sellers meetings openly affirm this fact.

From discussions with the publishers, we know that trade in licenses has been going on, but this has been difficult to quantify, since the negotiations start in one year and the contracts are signed in another, while the payments are done in yet another year. This has made it difficult for the publishers to put the direct value on licenses.

There is evidence of cross-border trade in East Africa between Kenya, Tanzania, Uganda, Rwanda, Somaliland, Sudan and this trade also flows into Southern African countries like Zambia. In Southern Africa as well, there is trade between South Africa, Botswana, Namibia, Swaziland, Lesotho, Zimbabwe, Zambia, Malawi and which is also flowing into East Africa. In West Africa, there is trade between Ghana, Nigeria and among Francophone countries. North Africans also trade in both French and Arabic languages as they use both in the education system.

It should be recorded that these are minimum estimates and we are hopeful to receive more statistics from our members as requests have gone out and we expect them soon²⁰.

More exports go out of South Africa into other Southern Africa countries, but due to the strength of the Rand, it is difficult for neighbouring countries to purchase much, converting their local currencies from the Rand to the USD then to their local currencies.

There has also been a lot of printing going on, especially with the availability of loans from the African Development Bank and World Bank to African governments for the procurement of books. Unfortunately, we do not have the figures yet, but one of the printers noted that he had done a lot of business in all regions of Africa, as a result of participating in the buyer-sellers meetings. He never misses any such meetings, as they are profitable to his printing business.

It has been confirmed that some of the orders for books are consolidated by UK companies, therefore distorting the picture of cross-border trade taking place in Africa. On direct sales across the borders, some information has been given but no actual figures; only approximate and average in some years. It is on the basis of these estimates and averages that I base my figures.”

²⁰ No further information was received from APNET on the same.

Table Annex 2.1: Intra African Book Trade Trends

The figures quoted are in USD

Country	2004	2003	2002	2001	2000	1999	1998	1997	1996
Egypt	2,000,000	1,000,000	500,000	400,000	300,000	-	-	-	-
N. Africa (French)	300,000	200,000	40000	40000	20000	-	-	-	-
Ghana									
Kenya	1,526,500	1,148,500	901,500	825,000	530,000	300	200	200	200
Mauritius	-	50,000	40,000	40,000	20,000	-	-	-	-
Nigeria	-	91,250	-	-	-	-	-	-	-
Tanzania	20,000	50,000	10,000	5,000	3,000	2000	-	-	-
South Africa	180,000	1,800,000	180,000	10,000	10,000	-	-	-	-
Zimbabwe	-	9,000*	-	35,000	10,000	-	-	-	-
Cote d' Ivoire									
Guinea	200	500	300	200	100	-	-	-	-
Benin	400	300	200	100	200	-	-	-	-
Senegal	-	600	400	200	100	-	-	-	-
Totals	4,027,100	5,250,150	1,672,400	1,355,500	893,600	2,300	200	200	200

*The figure of USD 9,000 from Zimbabwe is imports at ZIBF.

Source: APNET email of 5th July 2004 to the Evaluation.

Capacity of Trade Support Institutions

The gradual but steady build up of capacity among regional trade promotion bodies is visible in the following documentation by ITC, chronicling the buyer-seller events from the first event in 1993 till 2003, which saw the organisation of the event fully, by ITC's counterpart institution.

1993: The first buyers-sellers meeting for the African publishing and printing industry was organised in Mauritius, in co-operation with the African Publishers' Network and the Mauritius Chamber of Commerce and Industry. The products covered by the meeting included books, periodicals, graphic materials, desk top originating and design, industrial inks, paper and board.

1998: The second buyers-sellers meeting took place concurrently with the ZIBF. Preparations were initiated jointly with ZIBF, the African Publishers' Network and the pan-African Booksellers Association (PABA). Negotiations centred on the establishment of direct import/export links and joint ventures, covering areas such as: rights to titles,

translation rights, agency appointments, co-publishing ventures, distribution rights and licensing.

It was recommended to introduce buyers-sellers meetings as a standard feature of ZIBF, with ITC providing the necessary support.

1999: The third Buyers-Sellers Meeting for the African Printing and Publishing Industry was held on the occasion of the 1999 ZIBF, jointly presented by ZIBF, APNET and PABA.

2000: At the request of participants at the 1999 event, ITC had prepared a practical guide containing samples of contractual agreements in the publishing and printing industry. Some participants reported that they had applied the guidelines during the negotiations, while others announced their intention to organise workshops on the subject in their home countries upon return.

Prior to and during the meeting, further training was extended to a staff member of APNET in the various tools utilised in organising a buyers-sellers meeting. During the closing session APNET formally announced to take the lead in organising next year's buyers-sellers meeting, with only minor ITC support.

2001: The fifth buyers-sellers meeting proved to be a milestone in the sense that the African Publisher's Network, ITC's partner since 1993, took the lead in organising the event with only limited technical support from ITC.

As a step towards establishing stronger linkages between African publishers, printers and booksellers in order to take full advantage of intra-African trading opportunities, PABA and APNET signed a Memorandum of Understanding to jointly develop strategies for advocacy, training, reading promotion and terms of trade.

APNET demonstrated its ability to successfully organise a buyers-sellers meeting for the African publishing and printing industry, with only minor ITC assistance. APNET also committed to continue to take the lead in organising buyers-sellers meetings in other African sub-regions, and confirmed to organise the next buyers-sellers meeting at the Nigeria International Book Fair to be held in Abuja, Nigeria in May 2002.

2002: The sixth buyers-sellers meeting took place, *for the first time in West Africa*, in Abuja, Nigeria from 14 until 19 May 2002. The African partners exclusively promoted the event and ITC was requested to provide limited technical assistance.

A profile book containing full company details was distributed to all participants who used it as reference material to identify additional business prospects during the fair and to follow-up on contacts made. At the buyers-sellers meeting for the publishing and printing industry, the ITC publication entitled "Contractual agreements in the publishing and printing industry" was disseminated to the participants. Participants qualified this

publication, as a practical working manual for day-to-day use by publishers when making agreements with other publishers.

At the recommendation of the participants of the buyers-sellers meeting, APNET considered the organisation of three buyers-sellers meetings per year (in three different African regions), in parallel with international book fairs.

2003: At the buyers-sellers meeting held in Dakar, 50 enterprises from Benin, Burkina Faso, Cameroon, Chad, Côte d'Ivoire, Gabon, Mali, Mauritius and Senegal participated in 339 bilateral meetings.

The fact that APNET is now in a position to successfully organise buyers-sellers meetings with only limited technical support, was perceived as evidence of ITC's role in building capacity in the area of intra-regional trade promotion.

The APNET/PABA/ZIBF/ITC partnership not only demonstrated that the development of business relations in the book and printing sector is a long-term process, but also demonstrated that capacity building and achieving a shared sense of ownership and commitment require close co-operation over a longer period of time.

Beneficiaries

There has been a consistent increase in participation in the event by beneficiaries, with a high degree of repeat participation, which indicates continued utility of the events to businesspersons.

The ITC documentation on participation in various events is summarised below:

1993: The first buyers-sellers meeting was attended by 64 participants from 14 African countries. The majority of the participants demonstrated to recognise the commercial relevance of the meeting by bearing their own cost for travel and accommodation.

1998: The second buyers-sellers meetings took place among 104 African enterprises and institutions from 25 African countries. A total of 600 matches were scheduled using ITC's Match Maker software.

1999: The third buyers-sellers meeting saw 75 enterprises from 21 African and three non-African countries participate over a period of four days, for which a total of 1,915 trade leads were prepared. About 38% of the enterprises attending the 1999 buyers-sellers meeting were repeat participants from the previous event.

2000: The fourth buyers-sellers meeting saw participation by 49 enterprises, from 20 African countries. In addition, enterprises from India and the United Arab Emirates attended. The participants rated the buyers-sellers meeting as very useful; and reported a number of negotiations centred on co-publishing, co-printing and representation arrangements. 44% of the enterprises participating in the 2000 buyers-sellers meeting had also attended the 1999 event.

2001: At the fifth buyers-sellers meeting, participation was by invitation only, was based on an enterprise/product profile that was submitted to APNET prior to the meeting. 74 enterprises from 23 African countries participated in the buyers-sellers meeting. 468 pairs of appointments were arranged and communicated to participants through individual appointment schedules. In addition, there was attendance by enterprises from France, India, the United Kingdom and the United States of America.

2002: The sixth buyers-sellers meeting, the first to be held in West Africa was attended by 69 enterprises from 26 African countries and from India. 446 bilateral meetings were arranged and individual appointment schedules prepared. A profile book containing full company details was distributed to all participants who used it as reference material to identify additional business prospects during the fair and to follow-up on contacts made.

2003: At the seventh buyers-sellers meeting held in Dakar, negotiations held allowed the companies to conclude rights to titles, joint ventures, translation rights, and appointments of agents, co-publishing ventures, distribution rights and licensing agreements. For example, Imprimerie Saint-Paul (Cameroon) entered into a partnership with Imprimerie Tunde (Benin) to undertake complementary printing jobs for USD 600,000, and an Ivorian publisher signed a contract with a Senegalese bookseller to distribute its publications.

The Evaluation considers the ITC intervention in printing and publishing to be a model and a benchmark for best practices as well as success in the SSTP Programme.

In the Evaluation's opinion, the following were the key ingredients in this success:

- Product focus: the product was very specific - books and publications, and therefore, allowed for a good targeting of participant enterprises, and maximising the utility from the contact programme. In some other sectors the groupings were very loose, such as exotic food and beverages, which included more than 20 product groups, each very different from the other.
- Partnering with a sector association instead of a national TPO, which brings the organisation of the programme to the direct representatives of stakeholders, who have the most effective outreach within the sector.
- Innovative placement of the programme: alongside the international book fair enriching the value of events and exposing participants to new business opportunities. There have been requests, for instance from Central African Economic & Monetary Union and West African Economic & Monetary Union countries, that national fairs for publishing industry organised by the departments of education and associations should include such business-oriented components.
- Sustained activities with dynamic content: more than six events were held in this sector more than any other sector, and subjects/themes were selected based on business needs.

- Motivation and ownership: the APNET demonstrated leadership right at the beginning, roped in other partners and saw itself taking the lead in managing the event with reduced dependence on ITC.

Food Products and Beverages

In 1996 the project, with complementary financing from other sources, focussed on sub-regional trading opportunities in Southern Africa. The project identified food and beverages as a product sector representing promising trading opportunities between South Africa (imports) and other African countries (exports). It was estimated that South Africa's import demand for this product group exceeds USD 1 billion per annum. Although African countries export over USD 2.5 billion worth of food and beverage products to the rest of the world, their share in the South African market is estimated at less than 3%.

ITC documentation indicates the following record of events under the programme:

1996: The buyers-sellers meeting for this product group took place in Johannesburg, South Africa and was organised in collaboration with the South African Foreign Trade Organisation. It covered fresh and processed fruits and vegetables, natural honey, nuts, meat and fish and preparations thereof, dairy products, coffee, tea, mate and spices, cereals and preparations thereof, malt starches, oil seeds and oleaginous fruits, sugar, confectionery, cocoa and preparations thereof, processed food products and beverages (alcoholic and non alcoholic).

1997: Following the successful outcome of the buyers-sellers meeting on food and beverages in 1996, two additional buyers-sellers meetings were organised for the same product group. Participants were given copies of a number of guides and reference materials: "Exporting to the Republic of South Africa: An Overview", "Trading Opportunities in Southern Africa: A Statistical Analysis" and "Exporting to South Africa - A practical guide for food and beverage products". These were the first sector level materials on the South African market opportunities.

1999: BMSs were held on fish and fish products in Cape Town, South Africa.

2000: The event was held along with the World Economic Forum during the Africa Millennium Summit, in Durban, South Africa in June 2000. ITC linked non-African development finance institutions, service providers and individual corporations with investment promotion institutions, privatisation agencies and enterprises from Southern Africa.

The buyers-sellers meeting on exotic food and beverages took place in November 2000 at Johannesburg.

Trade Flows

Independent data on the trade flows in the SADC were studied to find evidence of a rising export trend in selected product groups (sectors identified for the programme) from SADC countries into South Africa.

As an illustration, the trends in exotic food and beverages indicate that during 1995 -1999, South Africa's imports from SADC have risen by 65% in absolute value terms, as against a 19% overall import growth in the category, from all sources. Also, the SADC market share rose from 12% to 16% (including a peak of 21%) of South Africa's imports of exotic foods & beverages. Countries that have seen a significant rise in exports to South Africa include Malawi, Congo DR, Tanzania, Zambia and Zimbabwe.

Table Annex 2.2: South Africa's Imports of Exotic Food and Beverages from the SADC Region, 1995 – 1999.

SAR ²¹	Total Imports, All Sources	Imports from SADC	SADC as % of Total
1995	603,401,156	71,122,482	12%
1996	539,200,291	74,194,426	14%
1997	689,332,073	133,100,031	19%
1998	756,099,285	157,488,188	21%
1999	719,193,039	117,530,976	16%

Source: Based on statistical data supplied by the Industrial Development Corporation.

Table Annex 2.3: South Africa's Imports from Individual SADC Countries, 1995 and 1999

Country	Value (Rand)		As a %age of Imports from SADC		Ratio of Total Imports		5-year Growth
	1995	1999	1995	1999	1995	1999	
Congo, DR	14,620	21,911	0%	0%	0%	0%	50%
Madagascar	3,963,027	2,019,597	6%	2%	1%	0%	-49%
Malawi	24,823,159	50,641,798	35%	43%	4%	7%	104%
Mauritius	77,957	35,165	0%	0%	0%	0%	-55%
Mozambique	9,529,829	8,694,644	13%	7%	2%	1%	-9%
Seychelles	475,352	349,589	1%	0%	0%	0%	-26%
Tanzania	712,476	1,520,075	1%	1%	0%	0%	113%
Zambia	4,780,350	8,034,134	7%	7%	1%	1%	68%
Zimbabwe	26,745,712	46,214,063	38%	39%	4%	6%	73%
Total Imports from SADC	71,122,482	117,530,976			12%	16%	65%
Total Imports	603,401,156	719,193,039					19%

²¹ South African Rand.

from All
Sources

Source: Based on statistical data supplied by the Industrial Development Corporation.

This trend confirms that there has been some conversion of the trade opportunity from regional integration into actual trade flows. However, whether this has benefited SMEs from SADC countries (the target beneficiaries of the intervention) and, whether there have been trade flows among the participants at the BMSs, remains indeterminate. Therefore, despite the positive trend in regional trade in the products selected by ITC under the programme, a direct attribution of cause and effect to the interventions remains elusive. However, the views of participant enterprises give an insight into the effectiveness of these events.

Observations of South African Participants

There were serious difficulties in the establishment of trade relationships among buyers and sellers. The observation of South African participants was that there was a serious mismatch between the profiles of the buyers and sellers, because:

- South Africa is a mature market and compares with the European Union in its sophistication. Therefore the standards in product quality, value-added content and appearance/aesthetics were considerably higher than those in the ‘supplier’ countries under the programme.
- Buyers found poor supply capacities from participants for their requirements, especially in packaging, quality and quantities – several suppliers could not offer adequate quantities to support requirements from large buyers. For example, chain stores like Shop Right Checkers require consistent quality goods and large volumes.
- Business participants from the supplier countries were mostly very small enterprises and often had little or no prior experience in exports. They found it very difficult to complete transactions even after receiving business from South African firms. There were problems with documentation, certification and labelling/packaging, which led to rework, delays and rejections despite the basic product being essentially acceptable.
- Supply countries lacked in institutional capacities to train exporters to meet importing country standards.
- Large importers often became impatient dealing with fresh suppliers, while there are other opportunities to pursue with greater likelihood of results.
- As a result, enthusiasm of South African business apparently dropped after the initial stages, and organisers had to struggle to get a meaningful participation of South African enterprises in subsequent events.

Furthermore, large buyers such as Shop Rite, which attended the initial programmes, have expanded their own operations in neighbouring countries and are sourcing increasing volumes from southern Africa. This is not necessarily with participants that were identified under the programme. Therefore, the increase in trade flows may not have had a high correlation with the event as such.

Capacities of Trade Support Institutions

ITC documentation indicates that the buyers-sellers meetings resulted in enhancing the capacities of the TSIs in (i) organising such events, (ii) preparing guides and reference materials for participants, (iii) use of ITC tools, and (iv) facilitating linkages between importers, exporters, investment promotion institutions, development finance institutions, etc.

However, meetings with ITC's national consultants as well as counterparts in South Africa and Tanzania indicated that most trade promotion bodies in the region were seriously lacking in capacities to undertake such events on their own, with the sole exception of the TISA, the national export development organisation. Even TISA admitted to the Evaluation the internal problems that had earlier impeded its trade support efforts, but claimed that they were now considerably resolved.

Beneficiaries

According to ITC records, the participating enterprises also benefited from the events, as evidenced by the value of trade orders negotiated and initiated during these meetings.

1996: The buyers-sellers meeting saw the participation of over 80 enterprises from 13 African countries. Participants reported confirmed orders valued at USD 11.3 million, and orders under negotiation valued at USD 47.1 million.

1997: 135 enterprises from 15 African countries participated in the meetings at the second meeting in Durban in January 1997 and the third in Cape Town in November 1997.

1999: 40 participants from seven southern African countries participated in this meeting on fish and fish products. Trade orders worth USD 7.5 million were negotiated.

2000: 155 business enterprises and institutions registered for the Match Maker programme. Among the African enterprises and institutions present, 31% had also participated in the 1999 event.

It is not possible to find out how much business was consummated after these events, as participants are reluctant to divulge such details. However, there are basic discrepancies in these records, inferred from the fact that 31% of the participants in 2000 translates into 49 participants, which deviates from actual numbers reported in 1999.

Leather Products

In 1995 the project surveyed in detail intra-African trading potential for raw hides and skins, leather and leather products. The analysis revealed that in spite of abundance in raw material supplies, African exports of this product group remain stagnant and the continent relies heavily on supplies from outside Africa. In 1993 the import value of these products amounted to an estimated USD 450 million. Imports of footwear, in particular, have increased considerably in the recent past and currently account for half of Africa's import of leather products. Partly as a result of trade liberalisation policies now being

implemented in most African countries, the African leather industry faces increasing competition from low cost producing countries outside the region. As home markets of most African countries are too small to provide economies of scale in production, there is an urgent need to reduce unit costs through the development of regional markets in Africa. This involves strategic positioning of supply capacities, and demand-driven marketing and production planning, particularly in the area of pricing, product design and delivery conditions.

Activities

ITC documents give the following chronology of activities in the programme:

1995: The First pan-African buyers-sellers meeting for leather products took place in Gaborone, Botswana in July 1995. The meeting was organised in collaboration with the Botswana Confederation of Commerce, Industry and Manpower.

1998: This buyers-sellers meeting was organised as part of the first All Africa Leather Convention and Trade Fair "Meet in Africa" in Cape Town, South Africa in November 1998.

The focus of the buyers-sellers meeting was on the promotion of intra-African trade, while at the same time allowing for technology and equipment inputs from outside the region. A statistical overview of the trends and characteristics of the African market for leather and leather products was presented to "Meet in Africa" participants as a seminar topic.

2000: Building on the success of the first "Meet in Africa" held in 1998, ITC took the lead in organising the second "Meet in Africa" in Casablanca, Morocco in October 2000.

For the buyers-sellers meeting, ITC distributed a CD ROM called Cybercafé, a compendium of information sources related to the leather sector in Africa, with 850 information sources organised in eight categories: tariffs and trade control measures, trade statistics, country profiles, trade and investment opportunities, business practices in the leather industry, company directories, and trade fairs and exhibitions. The Cybercafé also included a link to the "Meet in Africa" database of participants, as well as a listing of regional and country-specific search engines.

Observations

Rationale for Intra African Trade

While the usefulness of staging buyer-seller events in the leather sector is beyond doubt, the Evaluation considers that the argument for augmenting intra regional flows to correct the sector trade imbalance is not logical.

The project document mentions that despite producing an abundance of raw materials, African exports of leather goods had been stagnating. At the same time, imports into Africa have grown substantially, of which specific reference is made to the spurt in import of footwear.

From these two developments, the inference justifying the need for a regional networking programme is that African business enterprises are not fully aware of the existence of competitive supply sources from other countries in the region. Should this be the case, the real utility of the programme in this sector would be from its ability to increase the opportunity of networking and maximising the probability of contacts. The programme would rightly expect an enormous participation in the Meet in Africa events - which were the first regional events in leather in Africa -, and a spurt in business originating from the events.

However, the results from the events have not justified this assumption. The first three events, held in 1995, 1998 and 2000, together resulted in less than USD 5 million in trade potential among participants.

Similarly, the issue of spurt in imports is primarily an argument for greater indigenisation to substitute imports. But, this is a country level issue and cannot be regionalised: because countries do not distinguish between African and non-African origins - except if part of a customs union - in determining imports as a share of the sector. Therefore, import-substitution for the entire region is not a primary argument for an intra regional trade promotion event.

Analysis of the export import trends for the five-year period since 1998 indicates a consistently positive trade balance at the aggregate, and even for footwear. However, looking at the country level position, the footwear trade in the region is dominated by South Africa – a large importer, Morocco – large exporter and Tunisia – a large importer and exporter. Similarly, a few countries dominate the trade within other categories as well. In all, the bulk of the African leather sector is held among South Africa, Tunisia and Morocco, followed by Ethiopia and Egypt. Many of these countries are exporters to the EU, which accounts for a larger share of their exports than the African region. It is highly unlikely that the two markets have substitutable or similar products.

Table Annex 2.4: Africa Region Trade Trends in Leather Sector, Selected Categories, USD 000'

	1998	1999	2000	2001	2002
Hides/Skins 21					
Imports	11,409	14,066	34,969	33,007	33,474
Exports	40,665	30,442	131,489	159,229	153,391
Leather Mfrs 61					
Imports	189,492	191,534	267,944	288,553	267,975
Exports	123,472	135,829	400,894	315,463	283,239
Non-Text Clothg 848					
Imports	56,897	60,588	89,048	75,824	99,468
Exports	41,633	36,577	42,698	44,461	54,671
Footwear 851					
Imports	248,447	279,876	533,470	545,603	533,988
Exports	465,952	486,479	534,533	553,337	610,042
All Products					
Imports	506,245	546,064	925,431	942,987	934,905
Exports	671,722	689,327	1,109,614	1,072,490	1,10,343
Total Trade	1,177,967	1,235,391	2,035,045	2,015,477	2,03,248

Source: compiled from Leather line, ITC portal.

The other problem of low utilisation of Africa's raw material base is primarily an argument for a sector development programme, aiming to produce a wide range of value-added goods, and to a much lesser extent about trade and market re-orientation. In fact, there are several other sector-specific programmes operating in the region, addressing the value addition and competitiveness related issues. Some of these are the UNDP sector programme in Kenya, Common Fund for Commodities programme for upgrading of quality of skins and hides, and a Centre for Development of Enterprise project in East and Southern Africa, involving technical institutions. Therefore, there is little scope for the ITC project to address technical and competitiveness aspects in buyer-seller events, except sharing of knowledge at the seminars.

Beneficiaries

1995: The meeting was attended by 26 enterprises and organisations from nine African countries, and orders valued at over USD 1.3 million were negotiated.

1998: 130 enterprises from 30 countries participated in the programme, for which a total of 1,450 bilateral meetings were arranged. The exit poll at the event indicated USD 2.2 million worth import/export orders under negotiation, besides a number of potential joint ventures and other business co-operation arrangements.

2000: Attendance in the buyers-sellers meeting was up 50%, reflecting business appreciation for this programme element. Participants reported over USD 1.5 million of import/export orders under negotiation, of which USD 500,000 were confirmed during the event. Deals covered sourcing of skins for a tanning plant, substitution of leather accessories from Italy by new sources in Egypt and South Africa, etc.

The turnout of enterprises, given the large number of participating countries is not surprising, given the high concentration of the sector among four countries - South Africa, Tunisia, Morocco and Ethiopia. Even in these countries, the large exporters supply to the EU, and international fairs such as the Semaine de Cuir would probably hold greater interest to these exporters.

Capacities of Trade Support Institutions

A perusal of the activities across the years indicates low emphasis on skills transfer activities to enhance the capacity building of TSIs, which is among the most important deliverables under the programme to ensure sustainability.

Although the events saw new innovative elements, notably the CD ROM publications and the dissemination of regional market trends through the Leatherline portal, these remained essentially ITC delivered products and tools, with little local content contributed by regional TSIs.

This can be explained partly by the fact that unlike in some other sectors, the leather sector in Africa did not have a regional federation that could partner with ITC, as the main representative of the sector within the region. Therefore, ITC partnered with a mix of organisations to organise the initial events, including sub-regional bodies such as the Eastern and Southern African Leather Association, the Ethiopian Tanners Association, Tunisian Leather Association, etc. In fact, a regional body, the African Federation of Leather and Allied Industries was only created under the programme.

Yet there is not much evidence, even after the formation of African Federation of Leather and Allied Industries, of ITC training member institutions to stage such events and co-ordinate trade flows and supply surveys. This is even more significant because other programmes in the sector, notably the UNIDO leather sector programme in Kenya, have marketing and promotion related needs (Component 3), which do not seem to have used ITC's services despite the well-known specialisation in this area.

However, ITC roped in a large number of technical institutions to present useful materials at the event. These included Common Fund for Commodities, Food and Agriculture Organisation (FAO) and UNIDO, all of which are involved in technical assistance initiatives in some parts of Africa in the sector.

Shelter, Personnel Protection and Household Items; Food and Agricultural Products (Buying from Africa for Africa)

This was a new dimension to the project, aimed at increasing Africa's participation in development aid procurement. Supplying countries at the event were selected from the results of a trade flow analysis to identify the export potential of these countries with regard to shelter, personnel protection and household items. The participating companies at the event are identified by TPOs in the selected countries, and short-listed based on the recommendations of auditors who visit them in each country.

The auditors also offered consultancy assistance to the companies in preparing for the event, advising them beforehand on the requirements of the agencies.

The participants at the buyers-sellers meetings were procurement agencies and donor organisations including several UN bodies, represented by their procurement offices in Africa.

Activities

2001: The first buyers-sellers meeting under this initiative was organised in Nairobi, Kenya from 27 to 30 November 2001. The meeting was attended by 109 participants, representing 53 enterprises from Botswana, Egypt, Kenya, Mozambique, Sudan, Tanzania, Uganda, Zambia and Zimbabwe. 32 procurement officials representing 19 different aid agencies (Action Contre la Faim), African Medical Research Foundation, Catholic Relief Service, Inter Agency Procurement Service Office, International Committee of the Red Cross, International Federation of Red Cross and Red Crescent Societies, Lofgistic Centre Nairobi/Medicins Sans Frontières, Lutheran World Federation, MEDAIR²², Merlin, Northern Communal Area (NCA), Oxford Committee for Famine Relief (OXFAM), United Nations Centre for Human Settlement, United Nations High Commissioner for Refugees (UNHCR), United Nations Children's Fund, UN office at Nairobi, World Food Programme (WFP), World Relief and World Vision also participated.

The meetings fully achieved their objectives and changed the perception of the supply potential of the region. They enabled all buyers to discover new sources of supply and resulted in cross border linkages between African enterprises to maximise access to the international aid market. The meetings also prompted participating enterprises to explore options for product diversification and the vast majority of enterprises were invited to register on the roster of suppliers of aid agencies.

2002: This second event was held in Dakar, Senegal in June 2002. It brought together firms from eight African countries with 11 international aid agencies, both UN and NGOs that were looking to procure items for their operations within the region.

2002: The third was held in October 2002 in Midrand, South Africa. It was attended by 106 participants, representing 57 enterprises from Botswana, Kenya, South Africa, Tanzania, Zambia and Zimbabwe; and 27 procurement offices from 18 countries and 20 aid agencies (UN Agencies, as well as NGOs, and specialised institutions).

The two buyers-sellers meetings, by gathering together competent suppliers from 14 countries were particularly useful in improving the expectations of procurement professionals *vis-à-vis* the supply potential. According to the evaluation results, all participating buyers discovered new sources of supply within the sub-regions.

²² An international humanitarian aid organisation.

2003: The fourth buyers-sellers meeting in Nairobi facilitated African entrepreneurs from Egypt, Kenya, Mauritius, South Africa, Tanzania, Uganda and Zimbabwe to meet with representatives of international aid agencies (UN Agencies, as well as NGOs, and specialised institutions).

At the Nairobi buyers-sellers meeting, which aimed at facilitating access to the aid procurement market, participating firms were given reference materials that had been specifically developed for the sector, among which were:

- Agency profiles: A booklet highlighting characteristics and procurement practices of the major aid agencies operating within the region;
- Registration forms: A collection of registration forms that companies have to complete when applying for registration on the rosters of suppliers of individual agencies; and
- Procurement procedures: A collection and comparison of procurement procedures and practices in the area.

Beneficiaries

2001: The first meeting was attended by 109 participants, representing 53 enterprises from nine countries; and 32 procurement officials representing 19 different aid agencies. In all, 413 bilateral meetings were scheduled by ITC. Agencies reported after the meeting that they had placed an estimated USD 2 million worth of orders.

2002: At the Dakar event, 63 participants, representing 36 companies from the 8 countries involved, and 11 different aid agencies participated. ITC scheduled 232 appointments based on the information provided in the company/product profile forms correlated with the matching interests between the various sellers and buyers.

Over 80% of the participating companies reported that they had established new business contacts from the one-to-one meetings and nearly all companies were asked to provide information for possible inclusion in the rosters of pre-qualified suppliers of agencies. At the end of the three-day meeting, 85% of the buyers reported that the event had contributed in changing their perceptions of the sub-regional supply potential.

2002: At the third meeting in Midrand, 57 enterprises from six African countries and representatives from 27 procurement offices from 18 countries participated. 813 individual meetings took place.

2003: The fourth buyers-sellers meeting in Nairobi, August 2003, saw 127 entrepreneurs from seven countries meet with 27 representatives of international aid agencies. In all, 1,083 individual meetings were scheduled. Altogether, an estimated USD 6.6 million worth of potential business was concluded.

Capacities of Trade Support Institutions

The format of these events was similar to other sector-based events under the programme, and so there was no separate need for training of partner institutions. However, at the specific request of institutions from Kenya, Tanzania and Uganda, during

the meeting in 2003 in Kenya, ITC dedicated a half-day session to the issue of accessing the aid procurement market and strengthening the technical capacity of TSIs.

According to ITC, the aim of this session was to assess the motivation and ability of TSIs in filling this gap between suppliers and buying organisations.

Field Mission Observations

The Evaluation met several participants that have different profiles in this programme in South Africa, Kenya and Tanzania, including the TSIs, supplier enterprises and buyers, as well as the regional office of a large UN buying organisation. Besides personal interviews, a questionnaire was sent to the full list of participants provided by ITC.

The objective of the questionnaires and interviews was to ascertain if the participants benefited through one or more of the following:

- Increase in procurement from local suppliers;
- Increase in registrations with a larger number of buying organisations; and
- Product diversification arising from awareness of opportunities.

The TSIs were nonchalant, stating that they just facilitated the event; the buying organisations had well-set procedures for procurement and there was little the TSIs could do beyond putting together the list of suppliers.

As in other surveys, a large number of mails bounced. However, some replies were received from suppliers and buyers.

The few suppliers that met the Evaluation or responded to the questionnaires did not perceive benefits from the programme other than the opportunity to understand the procurement procedures better and register with a few more agencies. None of the suppliers that responded stated having concluded any new business with agencies identified through the programme.

The biggest impact of the programme, albeit only in terms of exposure, was in South Africa. The event was very relevant and timely because the UN, which had no connections with South Africa during the apartheid regime, had opened its opportunities to South African companies. In the 2002 events, more than 160 prospective suppliers attended the event. Their awareness of the procurement system was very low and participants found the concept as well as the information - compendium of buyer agencies and contact persons - highly interesting.

- The meetings with buyer agencies were well co-ordinated, but participants did feel the fatigue and just went through the motions after the third meeting.
- One supplier estimated that its business turnover had increased by 10% in the two years after the programme, but also mentioned that aid buying is a sporadic business and so no inferences can be made based on year-on-year turnover trends. 'When calamity strikes, agencies have the money and the procurement business goes crazy, but then it is a dull phase, until the next calamity'.

The two respondents in Kenya were already regular suppliers to humanitarian aid organisations, and were registered with the UN procurement offices in Africa. One of them got a few enquiries for three months from two agencies that had met it at the event, which stopped thereafter. The other did not gain any business from the event. Both mentioned that while the need addressed by the programme remained, the benefits from the programme were minimal.

End User Surveys

As part of the evaluation, the Evaluation sent simple questionnaires to 29 aid organisations and 38 suppliers (27 from Kenya), who were mentioned as participants in a list given by ITC (Kenya's Export Promotion Council, ITC's partner TSI for the meetings, could not furnish this list when sought by the Evaluation). Of the 67 mails, eight mails bounced, and only two buyers and seven sellers answered. Two reasons for the poor response could be: the deletion of the mails by spam mail filters, and a lack of inclination to participate in the evaluation.

The summaries of responses to the questionnaire have been tabulated below.

Table Annex 2.5: End-Users' Perception of the Buyer-Seller Programme

Theme	Scores on scale 1(none) to 4 (significant) of nine responses
Increase in business	1,3,1,3,3,2,2,2,2; mean score 2.1
Introduction of new suppliers/buyers	2,3,2,2,2,2,1,2; mean score 2.0
Useful information on buying procedures	1,3,3,2,4,2,2,2,2; mean score 2.3
Quality of supply and demand surveys	1,3,4,2,4,3,2,2,1; mean score 2.4
Awareness raising of problems, bottlenecks	1,3,3,2,4,2,1,2,1; mean score 2.1
Overall	2,3,3,2,4,2,2,3,2; mean score 2.5

According to this company, which produces tents, aid agencies need to co-ordinate in the following critical areas:

- Agencies should harmonise and adopt common minimum specifications for humanitarian aid products. This is in order to include a larger number of local suppliers and not give undue weight to non-critical or secondary specifications. At present, agencies have different specifications even for simple products like pots, pans and tents. This results in poor utilisation of locally available facilities co-ordination and has a trade diversionary effect, as experienced in tents purchases. Pakistan supplies more tents to some agencies in Africa despite large capacities available locally; only because the eyelet sizes specified by the agency are larger. Kenyan suppliers, having moulds for smaller eyelets, are technically disqualified, even though their tents are used successfully by other agencies, including in Afghanistan!
- The procurement policies of some agencies do not distinguish between manufacturers and traders, and this often results in traders getting consolidated orders for supplies of

several goods; and negotiating with manufacturers after getting orders, which can often be exploitative.

- For several small budget items that are procured regularly, agencies should consider fixed price contracts (based on normative costing) as an option to tendering, and give indications of off take over a longer period. This would make the process simpler and more efficient and enable suppliers to plan quantities based on the price bands fixed for purchase.

It is reasonable to conclude that the event has not contributed to a significant increase in procurements. However, it is accepted that aid procurement is largely based on a tendering process, and it would be incorrect to assume that the BMSs would result in direct transactions. Rather, they would only reveal existing opportunities and promote business contacts with a larger number of agencies than is possible on a one-to-one basis.

Therefore the realistic expectations from the event should be increase in the number of pre-qualified local or regional suppliers for all agencies having procurement operations in the region. However, even the UNDP office seemed unaware of a consolidated list of neither pre-qualified suppliers nor any updates to the same from the programme. Their list contained only names of the two enterprises met by the Evaluation.

However, there are several lessons to be learned from the experience of participants, which may lead to an increase in business:

Because aid procurement is a specialised business, the potential contribution of a general (i.e. not sector specialised) TSI is marginal in promoting the cause for localisation. Yet, there is a large market potential as well as a sizeable base of prospective suppliers in this business. Suppliers also wish to see a follow up on the procurement business. They also influence policies and practices among buying agencies to support greater local content and a more equitable opportunity for manufacturers than traders. During discussions with the Evaluation, a Kenyan company responded positively to the idea of creating an Association of Humanitarian Aid Goods Suppliers, and of holding regular follow up meetings with all the participating agencies (the data base to be provided by the TSI or ITC). This would be in order to understand why local procurements had not been increasing, and to address practical bottlenecks and difficulties encountered by African suppliers.

ITC may like to explore this possibility seriously and consider co-ordinating future events with a representative regional organisation, even assist in the formation of one.

Lessons Learnt and Adapted

It must be emphasised that the above evaluation was based on field missions only in Kenya, Tanzania and South Africa, and therefore the above observations and conclusions may not be automatically extended to other countries in Africa.

Based on discussions with ITC officers handling the programme in other parts of Africa, the Evaluation was given to understand that the programme has appropriately adapted its

deliverables to enhance the utility and consequently, the outcomes from the earlier events in the programme, as noticed in the following aspects:

Establishing business linkages in a variety of product sectors:

- ITC has consistently included new, innovative areas and sectors for south-south trade, including services, textiles and clothing, printing and publishing, and energy sectors as well as food, agricultural products, shelter and housing items for aid agencies. These sectors - particularly the services and aid procurement sectors - offer substantive business opportunities due to the size and growth potential of the market.
- Concrete business results have resulted consistently at the buyer-seller events in some sectors, notably in printing and publishing, testifying to the utility of focused events for competitive and export-ready enterprises.

Improving the operational performance of African enterprises and their competitiveness:

To enhance the effectiveness of the events, ITC has introduced relevant and useful practical themes under the buyer-seller events, such as:

- Tailor-made seminars to improve expertise in specific topics and strengthen export management such as seminars conducted on model agreements and legal aspects in the printing and publishing industry; and on the implications of international trade agreements for the textile and clothing sector, as well as providing practical tips for exporting those products to international markets.
- Distribution of reference materials for use during and after the trade promotion events.

Building institutional capacity for sustaining the process of African market integration:

- ITC continually addresses the inadequacies in motivation as well as technical capacities of TSIs in Africa, with a view to develop them to manage these events with reduced support from ITC.
- ITC provides its specialised experience of buyer-seller events to bring added value to regional economic summits, which provide opportunities for advocacy toward improving trade and related policies in the region, besides a forum for business and policy makers to interact on regional trade issues.

With these continuous improvements toward programme delivery, the results from the SSTP programme are expected to improve in terms of the capacity of enterprises to engage in regional trade; and the volume of business transactions facilitated by the SSTP events themselves. However, the extent to which such gains are realised would depend substantially on factors outside ITC, particularly with the counterpart institutions in the beneficiary countries. This again underscores the increasing importance of partnering with appropriate sector level TSIs, and looking beyond the conventional TPOs as programme partners, as already substantiated in the experience in the printing and publishing sector.

Annex 3: Case Study South-South Trade Promotion Programme – Global

Project title:	South-South Trade Promotion Programme
Country/region:	Global
Financed by:	Global Trust Fund Window II
Phase I	Total: USD 1,326,000
Phase II	Total: USD 2,100,000
Starting date:	Phase I 1999; Phase II 2002
Duration:	Three years (Phase I), extended by three years (Phase II)

In 1999, the SSTP became a global programme of ITC, funded under Window II of the Global Trust Fund.

The stated Objectives were:

- To put in place data sets providing quantitative and qualitative information on trading opportunities among developing countries, in a regional and selectively inter regional perspective.
- To introduce tailor-made methodologies and customised tools for south-south trade development.
- To generate new trade flows and trade-related business arrangements, among developing countries.
- To institute specific strategies and programmes for the expansion of south-south trade for eventual implementation with or without ITC assistance.

Regional Coverage

The programme operates in nine regions: ASEAN/South Asia, Interstate Council, Economic Co-operation Organisation (ECO), Central America, Economic Community of West African States (ECOWAS), Selected African - Asian countries, Mercosur and the Andean Community.

Activities Reported by ITC

The following activities have been reported by ITC during 1999-2004:

Trade Flow Analyses and Supply and Demand Surveys

1999: Trade flows were undertaken for ASEAN/South Asia and East Asia, Interstate Council, ECO, Central America, ECOWAS and Selected African - Asian countries.

2000: Nine supply and demand surveys on textiles were held in Economic Co-operation Organisation member countries in preparation of buyers-sellers meeting held in October 2001 at Istanbul.

2001: 24 supply and demand surveys were undertaken during the year - nine surveys on textiles in ECO member-countries, 10 surveys on agro-products and processed foods in the South Asian Association for Regional Co-operation/ASEAN member countries and

China, and five surveys in pharmaceuticals in Central America were used for enterprise selection and distributed to participants and TSIs at the BMSs.

23 surveys covering food products in the ECO region and automotive components in the South Asian Association for Regional Co-operation /ASEAN/Chin region were undertaken for the forthcoming buyers-sellers meetings in December 2002 and March 2003 in Singapore and Almaty, respectively.

2002: Trade flow analyses were undertaken for selected groupings of developing countries in Africa, Latin America and Asia/Pacific, and at inter-regional level. Results of trade flow analysis were analysed and validated through field research and select sectors to be covered by buyers-sellers meetings. ITC subcontracted 25 supply and demand surveys to identify TPOs and business organisations in Asia, Latin America and Africa.

2003: 40 supply and demand surveys were undertaken during this period (four supply surveys on food, agricultural products and construction materials and equipment in Central Asia; 20 supply and demand surveys on pharmaceuticals and natural products, five for Mercosur countries (LatinPharma 2004) and fifteen for AsiaHealthCare 2004; six supply surveys on food, agricultural products, shelter and household items in selected African countries; and 10 supply and demand surveys on textiles and clothing in Central and Western Africa).

Training and Customised Methodologies

1999: Methodology for supply and demand surveys and organisation of buyers-sellers meeting adapted to suit particular circumstances of event at UNCTAD X²³; and Modular training pack on SSTP methodology designed.

2000: The programme's tools were customised for the Exhibition 5th EU-Mediterranean Services Forum & Exhibition (Cyprus, October 2000) through a specifically designed enterprise profile form.

The programme participated at three experts meetings on strategic and operational issues relating to Afro Arab Business Forum II (New York, Durban and Pretoria).

A subcontract for supervision of the Asian participant-enterprise audits is being executed through Malaysia South-South Co-operation.

A consultant was detailed to participate in preparatory workshops held in Africa (Accra, Lome, Dar-es-Salaam and Pretoria) and Asia (Bangkok, Kuala Lumpur, Seoul, Beijing, Lahore and New Delhi) to deliver a module "Doing Business in Foreign Markets", and to assist in the enterprise-counselling clinics.

The training package on ITC's south-south methodology was developed in CD-ROM format. The product selection workshop for ECO member countries at Tehran was the launch venue for package.

²³ High-level Round Table on Trade and Development

2001: A Spanish version of the training package on the SSTP methodology (CD-ROM version) was launched at a product selection workshop, organised by the programme for TSIs from Central American Secretariat for Economic Integration member countries (September 2001, Guatemala). The workshop followed a new format that combined distance learning with contact interface.

2002: A workshop was organised for TPOs or similar trade related organisations in member countries of South Pacific Forum on the methodology for undertaking supply and demand surveys.

Consultations were held with secretariats of other regional groupings on the launching of training events for SSTP.

2003: Workshops and discussion groups for TSIs, government officials and buyers-sellers meetings participants were organised to examine the impediments to trade, disseminate best practices and promote regional policies in every buyers-sellers meeting held during the period. Issues like intellectual property law and practice, international marketing, quality control and packaging were usually addressed. In the particular case of aid procurement, the exacting procurement requirements of international agencies, organisations and NGOs were analysed in detail as well as the related standards prevalent in each participating country.

During a three-day workshop in Peru (November 2003) for TSIs in Andean countries, nine sectors were selected according to the priorities of individual countries and to the trade potential indicated in the trade flow analysis undertaken by ITC. A similar three-day workshop was held in Argentina for the Marcos countries in December 2003.

At a three-day workshop in Ivory Coast (February 2004), 58 participants from 12 countries of the Central African Economic and Monetary Union and the West African Economic and Monetary Union, as well as France and Switzerland, analysed trade information and market conditions for increased intra and inter-regional trade in textiles, clothing, printing and publishing industries.

Trade-Events and Buyer-Seller Meetings

1999: Inputs provided in the organisation and management of the Afro-Asia Business Forum, Kuala Lumpur, October 1999, with participation of 240 enterprises; and Buyers-sellers meeting for pharmaceuticals organised at UNCTAD X, Bangkok, February 2000, with 75 participants.

2000: The programme's first buyers-sellers meeting on services was held at 5th EU-Mediterranean Services Forum & Exhibition in Cyprus.

2000; Cyprus, October 2000. 42 enterprises from 12 countries participated in the meeting. Over 200 one-to-one meetings were arranged between participants.

2001: The Second Africa-Asia Business Forum (Durban, 9-12 July 2001) was organised to promote trade and investment at the enterprise level. The sectors represented at the event were information and communications technology, textiles and garments, pharmaceuticals, engineering equipment and services, electrical machinery, wood and wood products, agro-commodities and products, leisure and tourism.

The ECO buyers-sellers meeting on textiles and garments took place in October 2001, in Istanbul. 75 business participants representing 66 enterprises from Azerbaijan, Islamic Republic of Iran, Kazakhstan, Kyrgyz Republic, Turkey and Uzbekistan attended the meeting. The following product groups: silk, wool, cotton, man-made fibres, embroidery, fabrics, apparel and home-textiles featured in the scope of the meeting.

Making use of the Programme's Match Maker software, 140 one-to-one appointments were scheduled. All participants reported that the meeting had met their expectations. Information on products and markets collected for the purpose of this event contributed significantly to making the regional trading environment more transparent.

The Pan-Asian buyers-sellers meeting on agro-products and processed foods took place in Singapore, from 9 to 11 November 2001, and was attended by 56 enterprises from 12 countries, including LDCs in the region (Pakistan, India, Nepal, Sri Lanka, Cambodia, Lao PDR, Vietnam, Malaysia, Singapore, Indonesia, the Philippines and PR China). One-to-one meetings, spread over two and a half days, totalled 350, and were paired and scheduled by the programme's Match Maker software.

The LatinPharma buyers-sellers meeting on pharmaceuticals took place in San Salvador, from 11 to 13 April 2002. 44 enterprises from Central America participated in this meeting, which followed an innovative format, and 370 one-to-one meetings were held in the event. The event also incorporated expert-led conferences and a trade fair. A meeting on the importance of academia-industry linkages was also organised. The buyers-sellers meeting set the stage for an academia-business partnership for research, delivery of Good Manufacturing Practice courses in Guatemala and a LatinPharma website. The innovations contained in the LatinPharma format are being studied closely by the programme for adaptation elsewhere.

2002: Preparatory arrangements were made for buyers-sellers meetings in South and South-east Asia, Latin America and Central Asia.

Buyers-sellers meetings on services were held in Nairobi and Lagos on automotive components in Singapore; and inputs were provided for the ECO buyers-sellers meeting on agro-foods.

2003: A buyers-sellers meeting was held in Kazakhstan (Almaty, 18-19 June 2003), focusing on food, agricultural products, construction materials and equipment. Participants, both agencies and enterprises, expressed their appreciation for this cost-effective way of exploring new business opportunities. The aid agencies declared their

expectation to place orders between USD 4 to 5 million among participating suppliers as a result of the event.

Following the success of LatinPharma 2002, the programme organised LatinPharma 2003, in conjunction with UNCTAD's Biotrade Initiative, to promote intra-regional trade in pharmaceutical and natural products in the Andean Community (Bolivia, Colombia, Ecuador, Peru and Venezuela). Over 700 Latin Americans participated in a virtual discussion forum to identify and debate issues preparing the way for a series of conferences, a trade fair and a buyers-sellers meeting was held in Peru (Lima, 8-11 July 2003).

To encourage international aid agencies to procure more from African sources under the Buying from Africa for Africa initiative launched in 2001, ITC organised a buyers-sellers meeting on food, agricultural products, shelter and household items in Kenya (Nairobi, 26-28 August 2003).

The project for the expansion of intra- and inter-regional trade between the Central African Economic and Monetary Union and the West African Economic & Monetary Union member countries continued with two buyers-sellers meeting in the period. The first one, dedicated to the textile and clothing industry, was held in Cameroon (Douala, 12-14 November 2003), with the participation of 55 companies from seven countries (Benin, Cameroon, Central African Republic, Ivory Coast, Gabon, Senegal and Togo) and business transactions were reported for nearly USD 1.8 million.

The second one, for the printing and publishing industry, was held in Cote d'Ivoire (Abidjan, 10-13 February 2004), with the participation of 24 enterprises in five countries (Ivory Coast, Guinea, Niger, Senegal and Togo) that reported the conclusion of transactions in excess of USD 1.5 million, as a consequence of the meeting.

In conjunction with ITC's Trade in Services Unit's Bridges Across Borders initiative, the programme organised a networking event in Botswana (Gaborone, 16-17 December 2003) with the participation of 35 enterprises from three southern African countries (Botswana, Namibia and Zambia).

SSTP provided its matchmaking services at the World Economic Forum's Africa Economic Summit 2003 in South Africa (Durban, 8-13 June 2003) to 50 participating enterprises from 15 African countries, as well as Germany, Netherlands and United Kingdom. Similar services were provided at the World Economic Forum in Jordan event (Dead Sea, 15-17 May 2004) to 140 companies from 28 Arab countries as well as Belgium, Canada, China, France, and Germany.

Strategies for Expansion

1999:

- Follow-up activities to buyers-sellers meeting at UNCTAD X formulated and initiated.

- Specific proposals for intra-regional trade promotion programme for ECO formulated and submitted.
- Pilot Internet Site for SSTP conceptualized, and partly tested.
- Inventory of international legal instruments for trade dealings between business operators in Africa and in Asia prepared and disseminated.
- Project activities in support of intra-African trade expansion formulated and submitted for funding.

2000:

- As a follow-up to the UNCTAD X buyers-sellers meeting co-operation with the ASEAN secretariat being pursued through the ASEAN Consultative Committee on Standard and Quality Pharmaceuticals and Cosmetics.
- A website model and strategy was developed for AABFII.
- An inventory on the contents and quality of TSI Websites for the Southern African Business Forum was compiled. A prototype portal site to help improve the network of Southern Africa TSIs was also developed.
- An English version CD-ROM on the South-South methodology was produced. The Spanish version is under development, including an Internet-based distance learning application.
- A CD-ROM based Cybercafé on the African leather industry was produced, and over 500 copies distributed at the Meeting in Africa trade fair in Casablanca.
- CD-ROMs containing a Cybercafé in Pharmaceutical products and a video presentation of the buyers-sellers meeting at UNCTAD X were produced and widely disseminated.
- A Web-enabled company database is in its final stages of development. The software will be made available to TSIs to facilitate the exchange of company information over the Internet.
- A presentation on the tolls and the methodology for promoting regional trade and investment was made at the inaugural meeting of the Greater Mekong Sub-region Business Forum, in Bangkok.
- Following requests from country delegations at the Greater Mekong Sub-region Business Forum inaugural meeting, a proposal for targeted assistance has been submitted to the Asian Development Bank.
- A position paper was developed entitled “E-applications for trade integration” to guide future programme work in this area.

2001:

- Proposals for intra-regional trade expansion in the Central Asian region and inter-regional trade expansion between Central African Economic and Monetary Union and Union Economique et Monétaire Ouest Africaine were included under the programme.

- Substantive back up to the Intra-African Trade Promotion Programme and the Private Sector Development: Increasing Africa's Participation in Development Aid Procurement Programme continued.
- A Cybercafé during the 5th Afro-Arab Trade Fair (Tripoli, Lebanon, October 2001) was jointly organised by the Arab Bank for Economic Development in Africa and programme.
- The Spanish version of the training package on the SSTP methodology (CD-ROM version) was launched in September 2001 in Central America.
- A directory of law offices in the Central American Secretariat of Economic Integration region was produced as an information source for participants at LatinPharma 2002.

2002:

- Initiate/implement follow-up action on the LatinPharma 2002 buyers-sellers meeting, in the areas of e-networking, university-industry partnership and quality assurance.
- Further explore the scope for Internet applications for the purpose of "awareness creation", data dissemination, communication exchange, and partnership development.
- Compile "best practice" stories in south-south trade.
- Provide inputs into the formulation of trade promotion strategies and programmes in product groups that contribute to poverty reduction.

2003:

The information generated for the adoption of a trade and investment promotion strategy for the development of the pharmaceutical industry in the Andean countries during LatinPharma 2003 was prepared in CD-ROM format and distributed to participants, TSIs and other stakeholders. A similar strategy is being followed for LatinPharma 2004 (Mercosur, Secretariat of the Andean Community of Nations and Chile).

According to ITC, the impact of the SSTP programme has improved significantly, as reported by the following results for 2003:

- 518 SMEs participated in 14 SSTP events and 48 supply and demand surveys were produced;
- 34 of the 48 surveys were prepared by developing country TPOs under ITC guidance and sponsorship, and
- SMEs participating in SSTP-sponsored activities reported more than USD 43 million business transactions, as a direct consequence of their participation, against an expenditure of USD 1.756 million.

A few specific events under the programme were perused and discussed with ITC officials to understand the improvements made by ITC in the SSTP format, learning the lessons from earlier programmes in Africa.

South-South Trade Promotion Programme in Pan Asia

This programme aims at strengthening business linkages between enterprises in ASEAN countries with their counterparts in the Asia Pacific region, providing a background for formulation of a medium/long-term Pan Asian trade Expansion strategy and rendering quality advice regarding advantages of intra regional trade opportunities by capacity building of chambers and TSIs.

A major component of the project consists of a series of buyer-sellers meetings. Subsequent to a trade flow analysis for the region in early 2001 and product selection workshop attended by representatives from Trade promotion and business organisations from 11 countries, four product groups were selected for this purpose:

1. Agro Products & Processed food
2. Automotive components
3. Pharmaceuticals
4. Textiles

Pan Asian Buyers-Sellers Meeting on Agro Products and Processed Food

Singapore, November 9 - 11, 2001

The meeting was attended by 69 representatives from 56 enterprises in India, Pakistan, Nepal, Sri Lanka, Cambodia, Vietnam, Malaysia, Singapore, Indonesia, the Philippines and PR China, their diplomatic missions, TSIs, the ASEAN CCI and the media. Enterprises were selected within following product groups: Food ingredients & fragrances, Fruit & vegetable juices, Cereal products, Oilseed products, Apicultural products, spices, confectionary and specialty food products. Subsequent to an overview of ITC's SSTP activities and details of Asian SMEs, the need for enhanced intra-regional trade was stressed, followed by technical presentations by experts. 350 pairs of appointments were identified by ITC Matchmaker software and one-to-one consultations in 24 slots of 30 minutes each took place.

Highlights:

- Participants evaluated the meeting as very critical in accessing new markets.
- Information on products and markets collected for the event was significant in making regional trading environment more transparent.
- It not only provided a platform for negotiating direct import/export transactions but also revealed potential of investments and joint ventures.
- Participants found the meeting very useful and strongly recommended organising such events on a regular basis.

Evaluator Observations

Several concerns of the Evaluation on similar product themes in the African programmes are equally valid in this instance as well. The programme appears to have taken a very large agenda in the complex food sector, and to that extent, is likely to have a diffused representation of enterprises. It is argued that events focusing on a narrower theme with a complementary profile of products such as oilseed, edible oils, animal feed packaging, etc.

would be more effective. Also, supply surveys in food should take into account the varied and diverse consumer tastes and preferences across such a diverse selection of countries, Also account should be take of other sensitivities of some cultures and religions.

Pan Asian Buyers/Sellers Meeting on Automotive Components

Singapore, December 13-14, 2002

The meeting was attended by 95 representatives from 65 enterprises in India, Nepal, Sri Lanka, Cambodia, Vietnam, Malaysia, Singapore, Indonesia, the Philippines and PR China, their diplomatic missions, TSIs, the International Trade Institute of Singapore and the media. The profile of participating enterprises included Vehicle Manufacturers & Assemblers, OEMs, Systems Aggregators and OEM suppliers, traders, wholesalers and retailers.

Based on ITC research, benefits of enhanced intra regional trade in the automotive components sector were cited. Impediments and trade constraints were discussed in the closing session. Enterprises were selected on the basis of completed company/product profile forms. 447 pairs of appointments were identified by ITC Matchmaker software for one-to-one consultations.

Participants found the meeting very useful and strongly recommended organising such events on a regular basis.

Evaluation's Observations

Auto components are increasingly becoming part of vertically integrated global supply chains, and therefore do not lend themselves to sporadic trade patterns. OEM supply chains follow a rigorous process of vendor selection and deal with a few but highly reliable suppliers for their production requirements across various geographical regions.

Therefore, the two target customers in an SSTP type intervention are either the large global sourcing chains (Delphi, Toyota System, etc) or the after-sales market. The effectiveness of the Pan Asian event will therefore depend on the profile of participants and the customisation of supply surveys incorporating the sourcing needs expressed by key buyers.

ITC identified large after-market players and large OEMs to participate in the event, which increased the chances of success compared to a general trade show.

Asia HealthCare 2004 / Buyers-Sellers Meeting on Pharmaceuticals and Natural Products

Singapore, July 14-16, 2004

The meeting was attended by 93 enterprises consisting of business executives from importing and exporting companies, manufacturers, agents and distributors, research and service providers, representing 15 countries (Bangladesh, Cambodia, China, India, Indonesia, Lao PDR, Malaysia, Myanmar, Nepal, Pakistan, Singapore, Sri Lanka, Thailand, the Philippines and Vietnam), and 1,100 individual appointments were

scheduled. The product sectors included active ingredients and starting materials, formulations, biotech and natural products.

Results were highly encouraging: eight companies reported having signed new transactions and eight reported talks to explore joint venture opportunities. 40 companies reported identification of new potential distribution channels within the region and more than half the companies found new contract manufacture/sourcing opportunities. Several companies agreed that meeting provided information on regional trading opportunities and 85% companies promoted their products within the region.

Evaluation's Observations

There are complementarities in Asia in the pharmaceutical sector, with India and China becoming the preferred sources for Active Pharma Ingredients in generic medicines, while domestic formulators manufacture and market formulations. However, the interplay of TRIPs legislations among partner countries, and the provisions with respect to alternative medicine forms are important aspects in determining the trade potential in this highly regulated sector. Events should focus on the opportunities for research alliances and multi-country clinical trials for new drugs.

Though no field level evaluations could be made of these events, the most salient aspects of the programme in Asia are:

- New sectors have been introduced in the programme drawing from regional competence areas.
- The selection of participants has moved beyond the strictly SME focus, and included larger enterprises as well, based on the potential to enhance trade flows in the sectors.
- Participants and beneficiaries funded a large share of costs for the event.

LatinPharma 2003 and 2004

LatinPharma is an event focusing on essential medicines and on natural products derived from medicinal plants and allowing for the private sector to create links among themselves and with research institutes and universities. The main objective of LatinPharma is to promote intraregional trade and, by fostering strategic alliances among local partners, improve the region's competitiveness in the pharmaceutical sector.

Launched in 2002, it was held in El Salvador and subsequently in Peru (for the Andean Community) and Brazil (for Mercosur- Secretariat of the Andean Community of Nations -Chile community) in 2003 & 2004, respectively.

The programme is a considerable improvement over the conventional SSTP design, which involved only the BMSs.

Activities in the LatinPharma programme consist of:

1. Email based discussion forum covering the development of entrepreneurs and the Industry;
2. Series of Conferences (parallel events);

3. Trade Fair aimed at the SMEs; and
4. BMSs, a platform for business negotiations.

Andean Community: Programme for Intra Regional Trade Expansion LatinPharma 2003

- Rationale: The analysis of the trade flows for the regions revealed that it is one of mega biodiversity and Peru alone possesses around 20% of the medicinal plants of the whole region.
- Scope: It covered the five Andean countries (Bolivia, Colombia, Ecuador, Peru and Venezuela) comprised four activities and was supported by five TSIs and the Secretariat of the Andean Community of Nations. Another important regional body, Andean Development Corporation provided financial support to bring officials responsible for the registration of pharmaceuticals to attend the event.
- Output: 726 people from 31 countries registered for the five-topic discussion forum and over 300 attended the trade fair, conferences and a BMS.
- 80-90% participants rated the event as “very useful” or “useful” and 99% consented for participation in a future event in Brazil.

The participants unanimously agreed to the usefulness of the discussion and requested for such interventions to continue on a regular basis and information related to the topics be made available on a permanent basis in the Latinpharma website.

The Trade fair comprised 22 stands reserved through the LatinPharma website and was a huge success.

Based on the profile form completed by the participants, 1,258 potential business linkages were identified in the buyers-seller meeting but due to time constraints 601 one-to-one meetings were set up. All companies were surveyed by the TSIs but participation was based on selection criteria as follows:

- To be a small or medium sized company;
- Of national ownership;
- Running below 50% of installed capacity;
- Established in their own markets; and
- With some trade experience.

The main activities were supported by parallel activities targeting small & micro enterprises in the natural products sub-sector, which included:

- Business Development aspect to improve enterprise competitiveness in the pharma sector;
- Natural product development aspect as the region is home to more than 30% of medicinal plants of the planet;
- Harmonization of sanitary procedures; and
- Company visit to Hersil S.A., an opportunity availed by 32 companies.

Marcos- Secretariat of the Andean Community of Nations -Chile: Programme for Intra Regional Trade Expansion LatinPharma 2004

- Rationale: The analysis of the trade flows for these regions revealed:
 - High levels of imports of medicaments which outstrips exports;
 - Trade among regional partners, which stood at USD 19 million had a potential to reach USD200 million;
 - Supply & Demand surveys of Secretariat of the Andean Community of Nations members undertaken in 2003 and those of Mercosur and Chile indicated a very high level of companies operating in both sub-sectors, i.e. pharmaceuticals and natural products.
- Scope: It aimed to assess trade potential in pharmaceuticals among countries in the Andean Community of Nations, the Southern Cone common market (Mercosur) and Chile.
- Output: Over 1000 people participated in a five-topic email discussion forum and more than 300 from 15 countries attended the trade fair, conference and BMS.

It was organised and managed by an NGO based in Peru, the Cultural Immersion Experience (CIE), and moderated by experts from another NGO, Eduzyme. 84% participants considered the meeting useful and the BMS the most valuable part of the event.

The Trade fair comprised 27 stands, a small coffee shop and an Internet shop. Based on the profile form completed by the participants, 57 companies participated in and 1,358 potential business linkages were identified in the buyers-seller meeting, but due to time constraints 657 one-to-one meetings were set up.

Reported Business negotiations totalled more than USD 6 million - out of which USD 315,000 have already been placed and USD 3.38 million are under negotiation - and in terms of commercial impact exceeded all expectations.

Evaluation's Observations

There are some positive features of the LatinPharma event, which draw on the lessons from earlier events and improve the effectiveness of ITC's delivery.

- The programme design itself has been improved substantially and extends beyond a simple buyer-seller event by including a preparatory email forum, a trade fair and trade conference consisting of parallel sessions. This enhances the utility of the programme for repeat participants.
- Sector bodies and local counterparts did much of the preparatory work in the programme, which points towards increasing sustainability.
- Counterparts raised significant contributions from sponsorships, which is not to be found in several other regions in which the SSTP operates.

- Selection criteria for participants have been made more meaningful to include a wider profile: (i) a small or medium sized company, (ii) national ownership, (iii) running below 50% of installed capacity, (iv) established in their own markets, and (v) with some trade experience.
- There is an effective dissemination of information: the LatinPharma website has exhaustive content and registers a sizeable number of visitors, an average of 1,515 people per month.

The desk analysis and interviews with concerned ITC personnel in the above programmes indicate that the SSTP has been improved in design and emphasise more attention and detail to product and enterprise selection. ITC seeks out partners that are capable of handling the programme with declining financial support. All these are positive for the future results from the SSTP programme.

Annex 4: List of People Met

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Annex 5: List of Surveys and Publications Done by ITC

General Reports

- Partnership Development for Trade & Investment in Africa;
- Southern Africa Business Forum;
- Trade Opportunities in Southern Africa;
- Exporting to the Republic of South Africa;
- Trading Opportunities in Southern Africa;
- Undertaking Supply and Demand Surveys for Trade Promotion;
- Sub-regional Trade Expansion in Southern Africa.

Supply and Demand Surveys

- Agro, Food and Beverages;
- Automotive Components;
- Fish and Fish Products;
- Leather Products;
- Pharmaceuticals;
- Publishing and Printing Industry;
- Shelter, Personnel Protection and Household Items;
- Textiles and Clothing;
- Wood and Wood-based Building Materials.

Final Reports

- Agro, Food and Beverages;
- Automotive Components;
- Fish and Fish Products;
- Leather Products;
- Pharmaceuticals;
- Publishing and Printing Industry;
- Services;
- Shelter, Personnel Protection and Household Items;
- Textiles and Clothing;
- Wood and Wood-based Building Materials.

Other Publications

- Comreg Software;
- Cyber café on Afro-Arab Trade;
- Cyber café Buying from Africa for Africa;
- Cyber café on Fish and Fish products;
- Cyber café on Leather in Africa;
- Cyber cafés on Pharmaceuticals in Central America and the Andean Region (2002,

2003);

- Cyber café on Pharmaceuticals in Asia;
- Practical Guide;
- Training Package;
- Digital Video.

Trade Flow Analyses in

Sub-Saharan and North Africa Region

- Buying from Africa for Africa (Shelter, Personnel Protection & Household items);
- Buying from Africa for Africa (Food, Agricultural products, Shelter & Household items);
- Increasing Africa's participation in development aid procurement in food items; Shelter, personnel protection and household items;
- Market opportunities in South Africa as a result of the SADC Protocol;
- ECOWAS: Statistical indicators for sub-regional trade potential;

South East and Central Asia Region

- Asia Healthcare 2004;
- ECO: Identifying intra-regional export potential in agro-products and processed goods;
- Buying from Central Asia for International Aid agencies;
- Identifying export potential among selected Central Asian Commonwealth of Independent States member countries;
- ASEAN, selected South Asian Association for Regional Co-operation countries and China: Quantitative indicators of export potential in agro products and processed foods;
- Statistical indicators for identifying intra-regional trade potential among ECO members;
- Statistical indicators for identifying trade potential in ASEAN, selected South Asian Association for Regional Co-operation countries and China;
- ECO: statistical indicators for regional trade potential;
- ECO: Statistical indicators for sub-regional trade potential;
- Pacific island countries and selected Asian countries: Statistical indicators for intra regional trade potential;
- Greater Mekong Sub-region and ASEAN: Statistical indicators for intra regional trade potential;
- ASEAN: Statistical indicators for intra regional trade potential;
- ECO: Statistical indicators for sub-regional trade potential.

Latin America and the Caribbean Region

- The ANDEAN Community: Mercosur & Chile/Sub-regional Trade and Investment opportunities in essential drugs;
- The ANDEAN Community: Mercosur & Chile;

- The ANDEAN Community: Identifying intra regional export potential;
- The ANDEAN Community;
- Central American common market: Statistical indicators for sub-regional trade potential.

Inter Regional

- Southern African Customs Union-India: Identifying export potential and study of the automotive assembly and components industry;
- Statistical indicators for Identifying export potential between SACU and MERCOSUR;
- Africa-Asia Business Forum: Statistical indicators for intra regional trade and investment potential.

Annex 6: Specimen Questionnaire for Buying from Africa for Africa

Questions to be asked of buying agencies:

- Buying from Africa for Africa
- Buyer Seller Meeting, Nairobi, August 26 - 28, 2003

1	Name of official from agency who participated in the said Buyer Seller Meeting			
2	Did the meeting result in identifying new potential suppliers from Africa for your agency?			
3	Did you find the pre-selection/audit process of firms useful and relevant to your needs?			
4	Has there been an increase in procurement by your agency from Africa of these products covered in the meet?			
	Food: cereals, pulses, oil, biscuits, milk, blended food			
	Agri goods: seeds, hand tools			
	Shelter and housing: tents, plastic sheeting, tarpaulins, blankets, soap, mosquito nets, water containers			
5	Has there been any procurement by your agency for Africa since August 2003?	Food	Agri goods	Housing/ Shelter
6	Has there been an increase in the number of supplier registrations from the following countries to your agency since August 2003? Kenya South Africa Uganda Tanzania Zimbabwe Egypt	Food	Agri goods	Housing/ Shelter
7	Have there been increases in supplies to your agency by the following countries has increased since Aug 2003? Kenya	Food	Agri goods	Shelter/ Housing

	South Africa		
	Uganda		
	Tanzania		
	Zimbabwe		
	Egypt		
8	After the event in Aug 2003, have you been contacted by trade promotion institutions/ industry associations, individual firms etc. from these countries for further details about your procurement plans/ policies? Kenya	Yes	No
	South Africa		
	Uganda		
	Tanzania		
	Zimbabwe		
	Egypt		
9	What has been the contribution of the Buyer Seller Meet in Aug 2003 toward an increase/improvement in procurements by your agency? Matchmaking/ introduction of new suppliers with confirmed potential Useful information on buying procedures Supply and demand surveys Awareness raising of problems and bottlenecks Overall	Rank on a scale 1-4: None (1)-----Significant (4)	

Questions to be asked of TSIs:

- Buying from Africa for Africa
- Buyer Seller Meeting, Nairobi, August 26-28, 2003

1	Name of official from institution who participated in the said Buyer Seller Meeting
2	Did the meeting result in identifying new potential suppliers from Africa for your country? (Details/ numbers)
3	Did you find the pre-selection/audit process of firms useful and relevant to the buyers' needs?
4	Do you monitor the results from the event through feedback with the procurement

	agencies?			
5	Do you monitor the results from the event through feedback with the participant firms in your country?			
6	Has there been an increase in procurement/supplies from your country of these products covered in the meet?			
	Food: cereals, pulses, oil, biscuits, milk, blended food			
	Agri goods: seeds, hand tools			
	Shelter and housing: tents, plastic sheeting, tarpaulins, blankets, soap, mosquito nets, water containers			
7	Has there been an increase in the number of supplier registrations from your country to the participant agencies since August 2003?	Food	Agri goods	Housing/ Shelter
8	After the event in Aug 2003, have you been contacted by industry associations, individual firms etc. for further details about aid agency procurement plans/policies?	Yes	No	
9	What has been the contribution of the Buyer Seller Meet in Aug 2003 toward an increase/improvement in procurements by your agency? Increase in supplies from Africa for Africa	Rank on a scale 1-4: None (1)-----Significant (4)		
	Matchmaking/ introduction of new suppliers with confirmed potential Useful information on buying procedures			
	Supply and demand surveys			
	Awareness raising of problems and bottlenecks Overall			
10	Do you use the ITC methodology for other buyer seller meetings?			

Questions to be asked of participant enterprises:

- Buying from Africa for Africa
- Buyer Seller Meeting, Nairobi, August 26-28, 2003

1	Name of official from enterprise who participated in the said Buyer Seller Meeting
2	Did the meeting result in identifying new potential customers for your enterprise?
3	Did you find the pre-selection/audit

4	<p>process of firms useful and relevant? Has there been any procurement from you by any of the participating aid agencies for Africa since August 2003?</p>	Food	Agri goods	Housing/ Shelter
5	<p>Have you succeeded in registering yourself as a qualified supplier with one or more aid procurement agencies since August 2003? Number of agencies registered with</p>	Food	Agri goods	Housing/ Shelter
6	<p>After the event in Aug 2003, have you contacted the participant aid agencies/ for further details about their procurement plans/ policies?</p>	Yes	No	
7	<p>What has been the contribution of the Buyer Seller Meet in Aug 2003 toward an increase/improvement in procurements by your agency? Increase in/new business with participant aid agencies Matchmaking/ introduction of new suppliers with confirmed potential Useful information on buying procedures Supply and demand surveys Awareness raising of problems and bottlenecks Overall</p>	<p>Rank on a scale 1-4: None (1)-----Significant (4)</p>		

Annex 7: Specimen Questionnaires for Sub-Regional Trade Expansion

Questions to be asked of buying agencies:

- Sub-regional Trade Expansion in Southern Africa
- Buyer Seller Meeting, Johannesburg, November 28-29, 2000
- Exotic Foods & Beverages

1	Name of official from agency who participated in the said Buyer Seller Meeting		
2	Did the meeting result in identifying new potential suppliers for your agency?		
3	Did you find the pre-selection/audit process of firms useful and relevant to your needs?		
5	Has there been any procurement by your agency from the participant suppliers since the event in Nov 2000?	Yes	No
6	Have there been increases in supplies to your agency by the following countries since Nov 2000? Angola Madagascar Malawi Tanzania Zimbabwe Mozambique Mauritius Zambia	Yes	No
8	After the event in Nov 2000, have you been contacted by trade promotion institutions/ industry associations, individual firms etc. from these countries for further details about your procurement plans/ policies? Angola Madagascar Malawi Tanzania Zimbabwe Mozambique Mauritius	Yes	No

Zambia	
9	<p>What has been the contribution of the Buyer Seller Meet in Nov 2000 towards an increase/improvement in procurements by your agency?</p> <p>Matchmaking/ introduction of new suppliers with confirmed potential</p> <p>Useful information on buying procedures</p> <p>Supply and demand surveys</p> <p>Awareness raising of problems and bottlenecks</p> <p>Overall</p>
	<p>Rank on a scale 1-4:</p> <p>None (1)-----Significant (4)</p>

Questions to be asked of TPOs:

- Sub-regional Trade Expansion in Southern Africa
- Buyer Seller Meeting, Johannesburg, November 28-29, 2000
- Exotic Foods & Beverages

1	Name of official from institution who participated in the said Buyer Seller Meeting		
2	Did the meeting result in identifying new potential buyers from South Africa for your country? (Details/ numbers)		
3	Did you find the pre-selection/audit process of firms useful and relevant to the buyers' needs?		
4	Do you monitor the results from the event through feedback with the participant suppliers?	Yes	No
5	Do you monitor the results from the event through feedback with the participant firms in your country?	Yes	No
6	Has there been an increase in procurement/supplies from your country of these products covered in the meet?	Yes	No
8	After the event in Nov 2000, have you been contacted by industry associations, individual firms etc. for further details about suppliers and their plans/ policies?	Yes	No
9	<p>What has been the contribution of the Buyer Seller Meet in Nov 2000 towards:</p> <p>Increase in sub-regional trade</p> <p>Matchmaking/ introduction of new suppliers with confirmed potential</p> <p>Useful information on buying procedures</p> <p>Supply and demand surveys</p>		
		<p>Rank on a scale 1-4:</p> <p>None (1)-----Significant (4)</p>	

	Awareness raising of problems and bottlenecks		
	Overall		
10	Do you use the ITC methodology for other buyer seller meetings?		

Questions to be asked of supplier enterprises:

- Sub-regional Trade Expansion in Southern Africa
- Buyer Seller Meeting, Johannesburg, November 28-29, 2000
- Exotic Foods & Beverages

1	Name of official from enterprise who participated in the said Buyer Seller Meeting		
2	Did the meeting result in identifying new potential customers for your enterprise?		
3	Did you find the pre-selection/audit process of firms useful and relevant?		
4	Has there been any procurement from you by any of the participating buyers since date?	Yes	No
5	Have you succeeded in registering yourself as a qualified supplier with one or more procurement agencies since Nov 2000? Number of agencies registered with	Yes	No
6	After the event in Nov 2000, have you contacted the participant agencies for further details about their procurement plans/ policies?	Yes	No
7	What has been the contribution of the Buyer Seller Meet in Nov 2000 toward an increase or improvement in orders for your enterprise? Increase in new business with participant buyers Matchmaking/ introduction of new buyers with confirmed potential Useful information on buying procedures Supply and demand surveys Awareness raising of problems and bottlenecks Overall	Rank on a scale 1-4: None (1)-----Significant (4)	

Annex 8: List of Recipients to Questionnaires

**B/S Meeting on Textiles and Clothing
Durban, South Africa, July 16-17, 2002**

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MMF-Madagascar Magic Fingers

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Mrs. Beby Bueno, Secrétaire
Villa Sainte Marie du Rova
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