

# SOUTH-SOUTH COLLABORATION COOPERATION FRAMEWORK

This report was undertaken on behalf of the International Trade Centre (ITC) under the "Regional Integration Capacity Building (RICB) Project" of the Government of Zambia.

The designations employed and the presentation of material in this document do not imply the expression of any opinion whatsoever on the part of the International Trade Centre concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

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## **ACKNOWLEDGEMENTS**

The study tour to Ethiopia organized by the International Trade Centre (ITC) between 12 and 16 December 2016 served its purpose quite well by providing each delegate in the group the opportunity to study those aspects of the industry that were relevant to the objectives of their visit. The credit should go to ITC for its foresight in proposing this study as it served the logic of exploring the opportunities that exist in Africa first, before moving the gaze beyond the continent.

The study tour addressed all the key areas where insights were needed in the context of the Cluster Development plan that is under consideration. On the Ethiopian side, the Federal Small and Medium Manufacturing Industry Development Agency (FSMMIDA) deserves our thanks and appreciation for facilitating the study tour with useful visits and presentations.

## ABBREVIATIONS

ATIRA	Ahmedabad textile industry research association
ASCI	Administrative Staff College of India, India
ATDC	Apparel training and design centre
ASCI	Administrative staff college of India
AFD	African Development Bank
BTRA	Bombay textile research association
CICR	central institute of cotton research
CITI	Confederation of Indian Textile Industries
CRDA	Cotton Research & Development Association
CII	Confederation of Indian Industries
COMESA	Common Market for East and South Africa
CMTA	Cluster Management and Technical Agency
EARS	Ethiopian Agriculture Research System, Federal Institution
ETIDI	Ethiopian Textile Industry Development Institute
EIC	Ethiopian Investment Commission
FICCI	Federation of Indian Chamber and Commerce Industry
FISME	Federation of Indian Small Medium Enterprise
HEPC	Handloom export promotion council
NIFT	National institute of fashion technology, India
NID	National institute of design, India
NMCC	National Manufacturing Competitiveness Council, India
NSDC	National Skill Development Corporation
SIMA	South India mill association
SITRA	South India textile research association
SADC	South Africa Development Community
TSC	Textile Sector Skill Development Council, India
TMC	Technical mission cotton

# STUDY TOUR TO ETHIOPIA

## 1. Study Perspective

### 1.1. Objective

Zambia proposes to revive its textile industry and it therefore needs partnerships that would help Zambia acquire the knowledge, skill and technologies that are critical to the development of textiles as an independent sector in Zambia.

### 1.2. Approach

- It proposes to achieve this objective by first introducing handloom to the cotton farmers
- It further proposes to expand the scope by building two clusters, one in Lusaka and the other in Mumbwa.
- The Mumbwa will include wet processing and printing and will stop with production up to fabric stage
- The Lusaka cluster will be a dry cluster which will focus on final conversion- apparel and home furnishing
- It intends to fill the knowledge, skill, material and technology gap through a South – South Cooperation with countries within Africa and elsewhere outside Africa

### 1.3. Background Status

- Zambia's comparative advantage lies in cotton production
- Farmers own Ginning company has been formed and its operation is well supported with state of the art infrastructure and production facilities
- Core functions relating to spinning and weaving have commenced near the cotton belt of Mumbwa
- Few steps have been taken to promote textiles, but no major policy direction has been set yet in this regard

## 2. Observations

Highlighted below are the key points observed at various places during the study tour of Ethiopia. The tour started with a brief meeting at the FSMMDA office in Addis Ababa followed by visits to technical institutions, training centers, textile factories, and exporters of Ethiopian crafts and offices of senior textile bureaucrats.

### 2.1. List of Places and People Met & Visited

The table below provides the list of places and people visited and met during this trip

PEOPLE MET	POSITION, ENTITY
Mr. Asfaw Abebe Eregdaw	Director General, FSMMIDA
Mr. Ahmed Abteu	Minister
Mr. Yared Mesfin	Technique Sector deputy General Director Ethiopian Textile Industry Development institute
Mr. Ashish Agrawal	Kanoria Chemicals & Industries
Mr. R.D. Patel	COO, Kanoria Africa Textile PLC
Mr. Jacques Dubois	Muya Consultant Partner
Mr. Tesema	Asst. Professor and Scientific Director Ethiopian Institute of Textile and Fashion Technology

## 2.2. Synopsis of Observations

Synopsis of the observations made and the discussions held at various institutions is reproduced below

### 2.2.1. Ministry

The fact that exports comes directly under the control of the prime ministers says a lot about the importance the Government assigns to the development of Industry that is geared to serve global markets and global brands.

The institutional systems and the long term vision of the Government with respect to development of Human Capital backed by well aligned policies and programmes is another pointer to the direction the Government has taken to turn formal education the backbone of Ethiopia's Industrial development.

The Government is keen to leverage its comparative advantage in cotton. It has earmarked 3 million hectares of land for cultivation of cotton but only 18000 hectares are under cotton as per current estimates. Under a twinning programme with Cotton Association of India, Ethiopia has chalked out a plan to increase the acreage under cotton to become a prominent player in global cotton trade. The plan also includes cultivating organic cotton. The Policy makers also understand the risks involved in cotton cultivation and have promulgated "a guaranteed off take policy" to insulate the farmers from the vagaries of international trade conditions.

The policy now is shifting its focus to build Ethiopia's capacity in textile fashion and apparel technology. Ethiopia has a number of collaborations in place to facilitate this transformation and one of the prominent twinning programmes it has with NIFT- National Institute of Fashion Technology amplifies the intention of the policy makers in this regard. Its endeavour is to secure ISO 17025 certification to gain global recognition in this space.

Ethiopia also understands emerging trends in global markets. This is quite visible in the testing resources that are put in place to help the industry meet global standards in Environmental compliance.

The policy directions taken by the Government indicates its commitment to transform Ethiopia's textile sector into a world class destination for textile and clothing products. The institutional support, programmes and systems witnessed during the study underlines the proactive involvement of the Government to make a difference on the ground.

The Government has taken the Cluster approach to build pre-enabled manufacturing infrastructure designed to speed up the transformation process and the industrial parks will have an even greater bite with a techno park that is enabled to conduct R&D for the sector as a whole. Ethiopia is also keen to present itself as a favorable destination for investments in textiles with policies such as 15 years tax holiday and lease ranging from 45 – 99 years. Kanoria Textiles is a standing example of investors from overseas benefitting from the comparative advantages and policies of Ethiopia

Another interesting aspect of the sector level strategy speaks of a Federal structure that puts the onus on each of the provincial government to develop its own resources that are aligned to the national policy on SME development. The strategy followed in regard to market development also speaks of a value link specific focus to ensure that the strategies are designed to address the specific market interventions of each of the links in the textile sector.

The long standing challenge faced by Ethiopia in regard to logistics as a land locked country is all set to disappear with the railway line that is expected to go operational in about 3-months' time. Under a bilateral agreement with Djibouti, Ethiopia will soon have access to its port to reach global markets with greater ease. For the present, the Government offers a 25% discount on the logistics cost incurred by exporters on their overland transportations. This is augmented further with a 5% subsidy on FOB offering "green line" priority and bonded warehouse facilities.

The serious intention of the leaders, bureaucrats and policy makers finds an emphatic resonance in the comment that "problems are dealt with swiftly and none have a lifespan beyond a month".

### **2.2.2. FSMMIDA**

The very elaborate introduction given by Director General Mr. Asfaw Abebe Eregna explained the role of FSMMIDA and its SME focus to:

- Create Value
- Create Jobs
- Offer assistance to the poorest of citizens
- Facilitate SMEs to transform into large enterprises

In short, it intends to become the premier agency in creation of jobs to uplift the socio economic status of the underprivileged.

The resources at FSMMIDA are predominantly designed to facilitate development of communities through vocational training. It covered the entire spectrum of textile process that a community can easily get involved both under a cooperative and proprietary model. There is a great deal of emphasis on individual growth, economic empowerment through skill and entrepreneurship development.

The interesting aspect about the FSMMIDA facility is the tool room that has been installed to develop looms and other tools indigenously. The vocational training sessions are geared to train individuals in weaving, carpeting, spinning, tailoring, pattern and grading and designing.

### **2.2.3. Ethiopian Textiles Industry Development Institute (ETIDI)**

The core objective of the Institute is to build capacity, assist the industry build prototypes, enable students to bridge the gap between the academic teachings and the Industry requirement, and facilitate investments in core areas and to assist the industry with key insights in market trends and demand patters. The team was able to observe the type of technologies, knowledge and skills that were deployed for serving the demands of the industry at various levels. The Institute is well resourced to train students and workers from both the formal an informal segment of the industry. The installation of a new testing lab to inspect environmental compliance emphasizes the importance Ethiopia attaches to the demands that Global Brands place on ESG –Environmental, Social and Governance Compliance. The government is ensuring that the lab is equipped to help the industry put in place a national standard that is aligned with emerging global mainstream standards. Access to these laboratories enables the students' community, the textile communities and the industry to keep abreast of the emerging order in the textile industry. The lab is in the process of acquiring ISO 17025 for global recognition. An interesting aspect of the training is the materials costs are covered by the government.

### **2.2.4. Village Handloom Centre**

Visit to a village centre to view the handloom activities provided the right context to visit the Government Enabled Cluster Centers that followed. The infrastructure provided by the Government at the Cluster Centers engineers a remarkable uplift to the villagers who are forced to deal with many constraints and highly deplorable work conditions in their villages. The cluster centre supports the entire vertical starting from spinning right up to production of final products. Provisions have been made for each of the cooperatives to engage directly with the market. With some additional inputs, a larger showroom would make it possible for the communities to compete on an even larger footing.

### **2.2.5. Textile Cluster & Cooperatives**

Quite interestingly the Textile Cluster in Addis Ababa has adopted a vertical structure to save on real estate. It works perfectly well for even the looms as they are light in weight posing hardly any threat to the building. The centre has used a lot of imagination to help the communities retain their identities by running the two core operations, weaving and garmenting with their own procurement centers under one single

building. The spinning and wet processing units function like a central feeder unit in separate buildings. The facility and the participating groups, comprising youngsters and middle aged workers, emphasizes how these interventions can change the attitude of even the young generation towards handloom and handicrafts. The fact that many of the members from the visiting team were keen to buy their products explains the potential that exists for handlooms within the continent.

### **2.2.6. Bahir Dar Universities**

Mr. Addisu Ferede Tesema (asst. professor) and Scientific Director of the Ethiopian Institute of Textile and Fashion Technology started his presentation by mentioning a very important point that the First Textile Technology department was started in the year 1963 and the engineering department in 1997 and the Ethiopian Institute for Textile & Fashion in 2009. There are now 6 universities offering courses in Textile & clothing. The observations made during the study tour, bring out clearly the continuity in the approach taken over the years to deepen the knowledge, skill levels and expertise of the nation in Textiles and Clothing. The focus, over the years, has been to strengthen both the textile communities and the textile industry of Ethiopia through appropriate measures and interventions.

The policies of the government are set in the direction of transforming Ethiopia into a lead destination for Education, Research and Community Service in the whole of Africa by benchmarking itself with the educational systems of Germany. They expect their universities to have the facilities and the infrastructure to educate and train over 45000 students in different disciplines by year 2025.

To achieve this goal, the Government pursues with the policy of offering free education to its citizens. The key endeavour is to strengthen the nation's technical expertise in various disciplines to facilitate the process of faster industrialization and job creation. Keeping in mind the ground realities, institutional systems have been created to address the specific requirements of both the communities and the Industries with appropriate programmes and interventions.

While the community based programmes and interventions are designed to offer practical knowledge, skills, techniques and tools to improve the vocational skills of the people from the SME sector, the industry's requirement are met through transfer of technologies in partnership with countries like India and through sector specific interventions to address the gaps in the area of infrastructure and skills that are highly capital & skill intensive. The Textile Institute ETIDI is a case in point. The programmes and interventions are designed through a continuous assessment of the communities' and industries' requirement and by meeting those requirements holistically with well thought out measures leveraging various institutional guidelines such as TVET (UNESCO) and from the experiences of other nations with a longer history in textiles. The textile industry's requirements are gathered with the help of questionnaires and the gaps are then prioritized and addressed in a time bound manner. The emerging requirements especially in the area of knowledge and skill are addressed with periodical revisions in the curriculum of the universities and the skill development programmes for the communities. In short, the interventions, be it in skill development or revision in university curriculum, the decisions taken are largely need and demand based. To further the cause of formal education, the students from the universities of Ethiopia have access to the European Credit Transfer System that allows them to complete some of their semesters in the designated universities in Germany. The textile education in Ethiopia has evolved over the years to enter the realm of Research and Innovation in three core segments and they being, Textile Production comprising cotton cultivation, spinning, weaving , knitting: Apparel Production comprising design & fit, Garment construction, finishing treatments, merchandising and the third being, value addition comprising Printing, pre-treatment and finish, and colour management . This has paved the way for the university to offer many post graduate doctorate programmes especially in the area of textile engineering. The university owes its success to the highly detailed Governance structure it has put in place.

Ethiopia's progress in textile can be attributed to the foresight of the leaders and policy makers to build its own Human Resource in Textile Engineering Technologies, Textile Manufacturing, Textile Management and now fashion & apparel technologies. Over the last 5 decades, the progress has been very sustained and holistic in its approach to develop the skills and knowledge base of the sector through both formal and vocational system of education backed by a well-structured curriculum, delivery system and governance structure. The Industry, the people and the academic linkage is well captured in its curriculum and training programmes that are periodically benchmarked with the best in this sector.

### **2.2.7. Loom Manufacturer**

A visit to an Industrial lathe unit that is currently manufacturing looms for the local cooperatives is a FSMMIDA certified unit that is usually approached for building looms for the units and individual weavers located in the cooperative cluster in Addis Ababa. The lathe has substantial experience in loom construction and they are keen to step this up with more improvisations should demand for looms increase.

### **2.2.8. Muya Abyssinian Crafts**

This small private firm that exports some very fine accessories and women apparel using the traditional weaving skills and patterns of Ethiopia but contemporized to appeal to a global audience brings out the opportunity that exists for the handloom sector, if approached well. Observing the approach taken by this firm, the factors that separate them from the rest of the handloom communities and companies are

- a. Extreme precision, processes and practicing that meet exacting global standards followed by Global Brands
- b. Excellent Work place standards, treatment of employees and Governance
- c. Using traditional skills and techniques to produce designs that appeal to present generation
- d. Convergence of Modern Design interpretations and Traditional skills
- e. Focus on Customer satisfaction

This firm at present has about 185 looms and their lead buyer is LEMLEM a New York based brand that is known for women's wear. Though it has taken years for this firm to build this capacity to deliver, the message that comes out clearly from the eloquent description of their consulting partner Mr. Jacques Dubois, who has been associated with this project for many years, is the resounding message of opportunity that exists for the weaving community of Ethiopia. MU YA also manufactures pottery in exquisite designs.

## **3. Key Insights**

Personal observations made were in the context of studying the suitability of Ethiopia as a partner in the proposed South-South cooperation that Zambia intends to have in place to establish a Centre of Excellence (COE) that would spur the growth of textiles in the country.

- a. Strong commitment from the top most office of the Government
- b. Focus on improving the "Ease of Business" factor to facilitate inflow of investments
- c. Creating an effective Eco System with strong comparative advantages and favourable policies to attract foreign investments
- d. Determination to strengthen & leverage its comparative advantage in Cotton production, availability of land, water and power, low labour cost and proximity to Europe and the US.
- e. Clarity of vision in indigenization of knowledge, skill and technology as opposed to leasing of resources to overseas investments that result in flight of capital and leaving the nation exploited
- f. Strategic approach to building the HR capital to become self-reliant in building its own industry benchmarked against the best in class. Also to take a leadership position to become a centre of knowledge and education. It exhibits a sound grasp of the fact that Industrial growth is possible only when the country is in a position to produce high quality professionals
- g. The importance of bridging the gap between the Industry and the Academic with curriculum designed to meet the demands of the industry
- h. The need to benchmark both the curriculum and the industry with the best in class

- i. Strong institutional support with infrastructure related initiatives such as Industrial Parks, Techno Parks and Clusters to help the industry overcome the resource constraints in building highly capital and skill intensive technologies and infrastructure
- j. Clarity of vision in understanding the needs of community and industry. Emphasis on Vocational Education and Pedagogic education
- k. Having in place the right collaborations and cooperation to facilitate transfer of knowledge and skill
- l. Having institutional mechanism that are geared to serve the requirements of SMEs and Large Enterprises
- m. A strong realization that the country needs to find its own cultural footings with interventions in conceptual designing and value addition
- n. A structured approach to build market linkages across the value chain
- o. Not to let bureaucracy come in the way of dealing with problems and challenges
- p. Strategy based time bound policies with measurable goals
- q. Staying connected with their ears on the ground to serve their citizens better, the less privileged especially

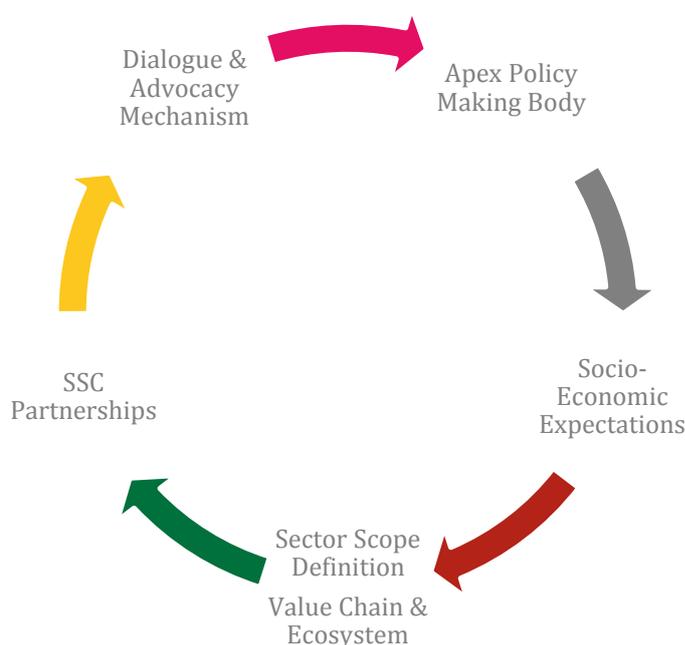
The insights gathered are relevant to what Zambia proposes to achieve in the field of Textiles to meet the socio economic visions and goals of the nation

# FUNDAMENTALS

## 4. Structured Approach

It is recommended that the process of building SSC partnerships takes a structured approach but after establishing the core fundamentals & systems as shown in the illustration below. Even a simple version of these fundamentals should do to safeguard the clarity of purpose and intent as decisions are taken by various operating components.

- Establish the Apex body vested with powers to draw policies
- Define the socio-economic expectations of the Government for the Textile Sector
- Define the scope of the textile value chain that is proposed to be addressed
- Announce policies to be followed in regard to SSC partnerships
- Establish an advocacy and dialogue mechanism to discuss the merits of the policy



The above illustration indicates that this approach will evolve through a continuous process of course corrections, refinement and redefinition of interventions. While elements like socio-economic expectations are likely to remain stable, the other elements in the link will evolve and undergo changes in their scope and content as the sector gains traction.

### 4.1. An Apex Body

South-South Cooperation, which is highly institutional in character, cannot happen in a vacuum as SSC Partnerships require both legal and policy validity to fall in place. In most instances, SSC partnerships are addressed under bilateral agreements between sovereign governments.

Enacting institutions or an Apex Body should first be in place to produce the legal and policy sanctity in SCC partnerships. There has to be some minimum capacity in the area of governance and therefore the following institutions will have to be in place before the ministry embarks on SSC partnerships should be:

#### **4.1.1. Dedicated Textile Department**

The ministry should consider creating a separate department that is vested with the powers to announce policies that support and facilitate SSC partnerships. In fact, a dedicated Textile Department should be seen as a pre-requisite for building a sector that is beginning to find its feet. In the absence of any clear department level identity and demarcation of roles and responsibilities with specific time bound goals, finding any progress will prove to be a daunting task. A fledgling sector cannot be left to compete with other sectors that have already reached a certain level of importance. More often than not, in the face of severe resource constraints, the compulsion and temptation of spending more where results are likely to be immediate will become more a rule than an exception. Priorities will take precedence over developmental initiatives pushing textiles to the background all the time. For the textile sector to evolve, it needs a dedicated department to protect its turf and its importance in the developmental plans of the Government

#### **4.1.2. Centre of Excellence**

The newly formed department should establish a Centre of Excellence to enter into legally binding contracts and agreements with partner institutions identified and selected for South- South Cooperation. COE therefore is another pre-requisite without which entering into institutional partnerships will not be possible. The South – South collaborations should be determined by the level of excellence proposed and the demand for skills and knowledge that are considered as necessary to initiate and sustain the development process

#### **4.1.3. South-South Cooperation Secretariat**

The process of building SSC partnership is highly technical and it requires full time focus and involvement at a department level. South-South Cooperation is critical to providing the “escape velocity” a new sector needs to” to get past the initial uncertainties, challenges and constraints. A secretariat provides the institutional standing with dedicated expertise to sustain and take the process forward.

#### **4.1.4. SME Sector Development Board**

The textile sector is likely to attract more SMEs than larger enterprises with financial needs that are likely to be a lot different than their larger counterparts. The financial needs of the SMEs will therefore have to be met with a different mind-set and slant. Development of SME sector has several important implications as they solve a number of socio economic challenges that a Government is invariably faced with. For instance, a strong and vibrant SME sector reduces the burden of the government in the area of employment generation while ensuring equitable distribution of wealth. It is therefore critical that a separate board is created to develop financial policies that are tailor made for the SMEs. Interventions like Capital Subsidy schemes, Credit Guarantee schemes & collateral free loans based on few key parameters will provide the jumpstart the SMEs would need to proliferate the sector. These interventions will have to be backed by macro level policies that would encourage formation of clusters to put in place infrastructure that are highly capital and technology intensive and beyond the means of SMEs. This institution should have seasoned bankers, financial experts and economists. This board may come under the governance structure of the finance ministry but giving the board a sectoral focus with domain knowledge is very important if it has to produce any result.

#### **4.1.5. Foreign Trade Cell**

It won't be long before Zambia's textile sector becomes ready to look beyond its national borders for business. Down south, it has some of the major global brands operating out of South Africa and elsewhere within the region; there are many nations that can turn into potential markets in textiles and clothing. It is therefore important that the Apex body comprises one more cell with expertise in foreign trade. This cell

should start the process of setting the stage for a robust foreign trade policy that would turn active 3 years from now. This will prove to be a useful roadmap for crafting FTA policies that would be in sync with the development roadmap planned for the sector.

## 4.2. Advocacy & Dialogue Mechanism

The SSC secretariat should install a dialogue mechanism in place that connects the policy makers with the prospective stakeholder, investors, service providers and the academic. The inputs received will prove to be valuable in shaping policy measures for the new sector. The expectations and aspirations on the ground should be given a means to reach the policy makers with fewer challenges. Responding to useful suggestions with adequate measures will let the stakeholders feel included in the building process. The dialogue mechanism should have a consultative group comprising senior bureaucrats from key ministries representing the government on one side and a stakeholder's body representing the interest of the trade, investors, global brands and service providers on the other. This engagement will keep the policies grounded to realities on the ground.

## 4.3. Socio-Economic Outcomes

The textile department, under the ministry of textiles should articulate the Socio-Economic outcomes it intends to achieve through the development of the Textile sector. These expectations should drive the entire development process of the sector and in the context of this document the SSC partnerships. The purpose of having clarity in the matter is to know where we are headed and why we are headed in the said direction. It would help, if these expectations are measurable wherever possible. The template below lists out some of the socio-economic outcomes that Government would be keen to achieve with the help of a robust textile sector. The list can be expanded further to include more outcomes that are relevant to the economy of Zambia.

<b>SOCIO-ECONOMIC OUTCOMES</b>			
<b>STAGES</b>	<b>SHORT TERM</b>	<b>MEDIUM TERM</b>	<b>LONG TERM</b>
<b>TIME SCALE</b>	1 MONTH - 12 MONTHS	13 MONTHS – 24 MONTHS	25 MONTHS+
<b>SOCIO-ECONOMIC METRICS</b>			
<b>Cotton Value Addition</b>			
<b>Skill Development</b>			
<b>Employment Generation</b>			
<b>MSME Development</b>			
<b>Women Employment and Entrepreneurship</b>			
<b>Exports and \$ inflows</b>			
<b>Industrial activity</b>			
<b>(any other)</b>			

## 4.4. Scope of Textile Value Chain & Ecosystem

The scope of the value chain and associated activities mapped below should be read in the context of handlooms. The team should detail the template further by defining the scope of the activities to arrive a set of interventions that are well matched and aligned to the developmental plan

TEXTILE ECOSYSTEM					
COTTON CULTIVATION	SPINNING	WEAVING KNITTING	PROCESSING	STITCHING	VALUE ADDITION
CORE MANUFACTURING & OPERATIONS					
Cotton Cultivation & Ginning	Hand spinning & multi headed hand spinning	Plain Weaving	Dyeing process	Sewing	
		Dobby, Textures & Finishing, Fabric Manipulation	Finishing Process	Fashion Designing	Screen Printing techniques
		Textile Designing		Grading, Pattern Making & costume fit,	
Fibre Quality Testing	Yarn Quality Testing	Fabric Quality Testing	Colour matching and dyeing standards testing	Trimming, Garment Quality checking	
Mill and production floor management & supervision	Mill & production floor management & supervision	weaving unit production floor management & supervision	Processing unit production floor management & supervision	Garment Unit product floor management & supervision	Printing and Surface work production supervision & Management
Seed Production & Distribution			Import of dyes & chemicals	Import/ local production of trims & accessories	Import of printing dyes & embroidery threads
BUSINESS FUNCTIONS & SERVICES					
Commercial Functions	Commercial Functions	Commercial Functions	Commercial Functions	Commercial Functions	Commercial Functions
Import/local production of ginning machinery	Import / Local production of spindles	Import/location production of looms, pirns	Import/ production of dyeing, boilers and processing technologies	Import/ local production of sewing, cutting machinery	Import/local production of printing machinery
Business promotions	Business promotions	Business promotions	Business promotions	Business promotions	Business promotions
Repairs & Maintenance- Ginning	Repairs & Maintenance- spinning	Repairs & Maintenance - Weaving	Repairs & Maintenance- Processing	Repairs & Maintenance- Garmenting	Repairs & Maintenance- Printing
TEXTILE MACHINERY MANUFACTURING					
	Hand spindle Engineering	Hand Loom engineering	Hank dyeing, boilers		Screen Printing frames, wooden block making

#### 4.5. SSC Partnership Policy

The secretariat should identify the policy areas where a South –South partnership is essential to create the historical depth and institutional perspective in policy making. The textile department’s recommendation should form the basis for the secretariat to come up with a holistic SSC plan with timelines and measurable

goals. The SSC plan should prioritize the areas for development and have them in place with meticulous precision so that partnerships in the area of policy making are neither ahead of their times nor late in coming. The SSC strategy should also be calibrated for 3 time horizons- short term, medium term and long term and it should have an overarching influence across the textile value chain, the key drivers and the socio-economic outcomes it intends to gain through the development of the textile sector

<b>SSC PARTNERSHIP POLICY</b>			
<b>STAGES</b>	<b>SHORT TERM</b>	<b>MEDIUM TERM</b>	<b>LONG TERM</b>
<b>TIME SCALE</b>	<b>1 MONTH - 12 MONTHS</b>	<b>13 MONTHS – 24 MONTHS</b>	<b>25 MONTHS+</b>
<b>SOCIO-ECONOMIC METRICS</b>			
Selection of Focus areas			
Level of Indigenization in Technology			
Level of Indigenization in Knowledge & Skill			
Transfer Mechanism			
Instruments of Agreement & Engagements			
Character of Engagement -Governmental/Institutional/Private			
Delivery Systems			
Funding			

#### 4.5.1. Key Points for Partnerships

<b>DETAILED REQUIREMENT ANALYSIS</b>
Areas where SSC is needed
Articulation of Deliverables
Qualification and Quantification of Deliverables
<b>OBJECTIVES OF PARTNERING</b>
Strategic Vision
Common Grounds
Bilateral / Multilateral Trade Agreements
<b>TERMS OF ENGAGEMENT</b>
Scope
Investment commitments, stages of investments
Cost of Ownership:
Knowledge ownership
IP and Ownership of Discovery
Post-Sales Support availability
Service Level Agreements
Warranties & Liabilities

SOUTH-SOUTH COLLABORATION – COOPERATION FRAMEWORK

Confidentiality, sharing of info
Level / grade of Knowledge to be transferred
Scope of Transfer: Degree of Indigenization / Co-creation
<b>INDUCTION OF VENDORS &amp; 3RD PARTY</b>
Agreement on Third Party Induction & involvement
Selection parameters and process of Technologies
Selection parameters & Process of Vendors
<b>ANALYSIS OF LOCAL ENVIRONMENT</b>
Pre-Conditions & Pre-Qualifications for Implementation
Assimilation Complexity
Involvement & Commitment of Management
Suitability and compatibility of local conditions
Language Barriers
Difference in working methods , culture & ethics
Availability of local resources
Operating capacity
Tax and Foreign Exchange regulations
Regulatory & Statutory clearances & compliances
<b>TRANSFER MECHANISM</b>
Teaching aids, tools and methodologies
Delivery Channel, type of channels
Ownership of Channels - Owned or third-party
<b>IMPLEMENTATION</b>
Steering Committee
Audit & Inspection guidelines
Review & Follow up Measures
Milestones, Timelines & Completion Certificates
<b>POST IMPLEMENTATION FINAL AUDIT</b>
<b>REDRESS MECHANISM</b>
Arbitration
Jurisdiction

# **BUILDING KNOWLEDGE & SKILL CAPACITY**

This section maps the knowledge and skill requirement across the value chain spectrum comprising core manufacturing process, then the Knowledge and Skills requirement across the business functions, across the ESG spectrum and the triple M spectrum.

## **5. Building Knowledge & Capacity**

### **5.1. Categories of Skills & Knowledge**

The textile industry requires at least three categories of skills and knowledge to become fully functional. Zambia, at this point in time, lacks skills and knowledge in the core areas. Generation of knowledge and skill in the core area has to be done in stages with a mix of options, from importing skill and knowledge to sending select personnel to acquire the required knowledge and skill in the areas earmarked for first stage development. Specialist and Professional skills and knowledge can be acquired to a reasonable degree within Zambia but their orientation to textiles will have to be done through a process of being trained at overseas centres or by specialists and professionals from other countries by running workshops in Zambia.

#### **5.1.1. Core Skills and Knowledge**

- A. Machinery building
- B. Product development
- C. Manufacturing Operations

#### **5.1.2. Professional Skills and Knowledge**

- A. Operations
- B. Market Development

#### **5.1.3. Specialists Skills and Knowledge**

- A. ESG Compliance and Management
- B. Entrepreneurship & Organization Development

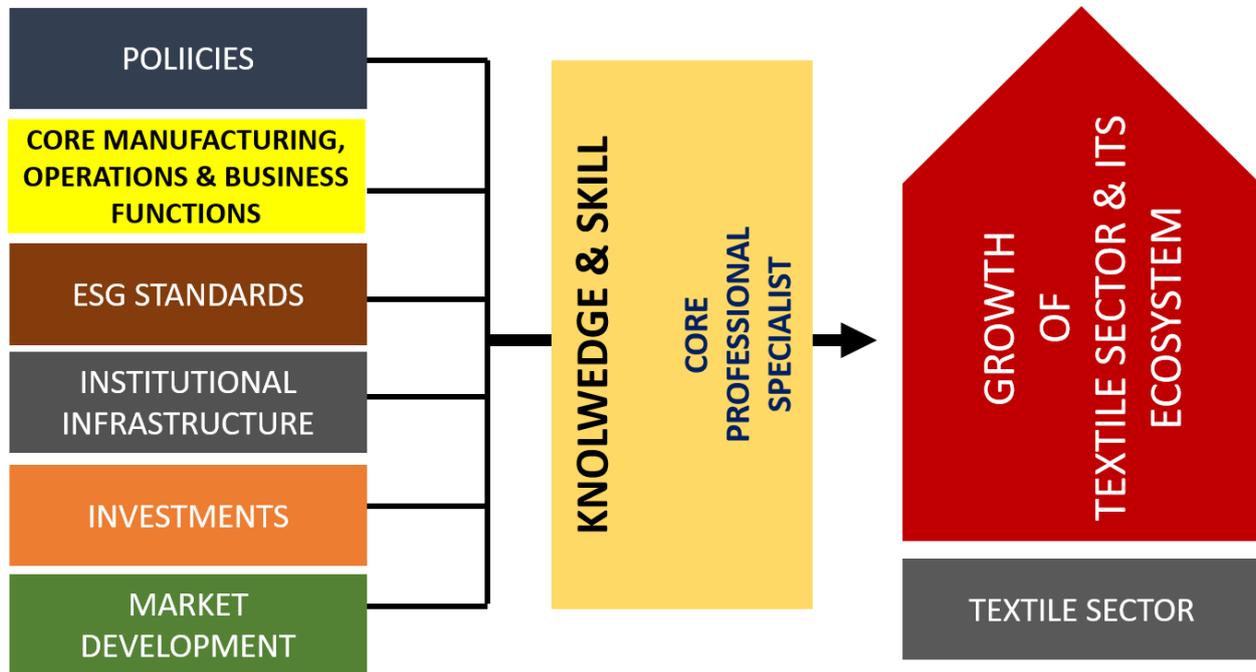
The Textile specific skills will have to be secured from countries that have a long history of textiles. Zambia's initial focus may not be exports and therefore knowledge and skills that are considered as essential to support an export regime, can be put on hold, save in few areas, till the industry is ready to move to the next phase of its development.

Professional Skills and Knowledge are more management oriented and the industry should face no problem in finding the right people locally in Zambia to manage the functions relating to operations and market development. It is recommended that the Apex Body initiates a process that secures the first set of professionals for the textile sector. This group will be given some extensive training to get an understanding of the textile industry.

Specialists are needed in helping the industry build its skills and knowledge level in Organization Development, Entrepreneurship Development and ESG Management. These three disciplines do depend on management techniques and methodologies to function effectively, but by and large they are highly technical in nature and will have to be sourced from countries such as India & Ethiopia where there are some leading institutions with specific courses in these disciplines

## 5.2. Focus Segments for Transfer of Knowledge and Skills

The focus segments shown below should be covering almost 90% of the sector's Knowledge and Skill requirement of the textile sector



In the following sections, each of the above 6 modules has been covered extensively with an indicative list of possible SSC partners who are well placed to provide the knowledge and skills these 6 components would need to help Zambia's textile ecosystem take a definitive shape.

### 5.2.1. Staged & Flexible Transfer Model

It should be borne in mind that the mix of destination countries and the technology & knowledge partners will change as the Zambian textile industry transits from one stage to another. It is therefore important that the agreements entered into are kept short term and highly flexible. For the sake of clarity let us define the evolutionary stages as follows

- a. Take off stage – Pioneering stage
- b. Development Stage
- c. Growth Stage
- d. Maturity stage

## 5.3. Policy Ecosystem

Policy making plays a key part in building sectors from the scratch. A strong policy ecosystem backed by visionary and pragmatic leadership is necessary to achieve the socio economic goals of the mission and textile being a new sector for Zambia, the importance of gaining some insights on policy making in the context of textiles cannot be stressed more. It is therefore critical that a select group of senior bureaucrats & policy makers are given some grounding on Textile policies and the processes that are generally followed in making policies. The table below provides the list of areas where firm policy directions can make a critical difference to the development and growth of the sector.

<b>SSC PARTNERSHIPS IN SOME KEY POLICY AREAS</b>		
<b>KEY POLICY AREAS</b>		
<b>TEXTILE ECOSYSTEM DEVELOPMENT</b>	<b>ENTITY/INSTITUTION</b>	<b>COUNTRY</b>
Policies - on Cotton Development	Central Institute for Cotton Research	India
	Cotton Research & Development Assn	India
	Ethiopian Agriculture Research System	Ethiopia
Policies - Cluster Development approach	ETIDI	Ethiopia
Policies - Cluster Formation & Implementation	CMTA	India
Policies - Cluster Development Framework	HYDRA	India
Policies - Textile Technology & Indigenization	Ministry of Textiles	Ethiopia
	FICCI	India
Policies - HR Capital Development in Textiles	Textile Skill Council	India
Policies - Knowledge Indigenization	FEMSEDA, Bahir Dar University	Ethiopia
Policies - Manufacturing excellence & Benchmarking	NMCC	India
Government Schemes & Initiatives -India	Hydra	India
<b>STANDARDS</b>	<b>ENTITY/INSTITUTION</b>	<b>COUNTRY</b>
Policies - ESG standards. Formal training	CFA Institute	India
	Bureau Veritas	Zambia
Policies - Product standards	Intertek	South Africa
	Hohenstein Institute	Tanzania
Government Schemes & Initiatives -India	Hydra	India
<b>MARKET DEVELOPMENT</b>	<b>ENTITY/INSTITUTION</b>	<b>COUNTRY</b>
Policies - Trade Promotions	Confederation of Indian Textile Industry	India
	Handloom Export Promotion Council	India
	DASTAKAR	India
Policies - Intra regional trade	COMESA	Zambia
	SADC	Botswana
Policies - IP Rights, International Trade Risk Management,	federation of Indian SME	India
Policies - Focus Market, domestic, COMESA & Global	COMESA	Zambia
Government Schemes & Initiatives	Hydra	India
<b>INSTITUTIONAL INFRASTRUCTURE</b>	<b>ENTITY/INSTITUTION</b>	<b>COUNTRY</b>
Policies - Institutional infrastructure for Textiles		
MSME	FISME, FICCI	India
Policies - Investments, priority sector lending,	Ethiopian Investment Commission	Ethiopia

	Confederation of Indian Industries	India
	Federation of Indian Chamber of Commerce & Industry	India
Government Schemes & Initiatives -India	Hydra	India
<b>INVESTMENTS</b>		
Policy Direction for SMEs	Financial Institutions	Zambia
	Industry Chambers, Councils- FICCI, CII	India
Financial Infrastructure, Regulatory & Supervisory Systems	Ethiopian Investment Council	Ethiopia
Products, Solutions & Services	SIDBI, NABARD, MNRE, Rural Infrastructure Dev	India
New Age Funding	Venture Fund Organizations	India
Government Schemes & Initiatives	Hydra	India

## 5.4. Core Textile Ecosystem

### 5.4.1. Core Manufacturing & Operations

Under this section, knowledge and skills pertaining only to core manufacturing activities have been considered, which includes managing and supervising the operations of the production activities. Ethiopia offers some substantial scope in this space and even better placed to deliver them given the similarities they enjoy with Zambia in the area regional affinities including time zones.

SOUTH - SOUTH PARTNERSHIP IN CORE MANUFACTURING & OPERATIONS							
COTTON CULTIVATION	SPINNING	WEAVING KNITTING	PROCESSING	STITCHING	VALUE ADDITION	POTENTIAL PARTNERS	COUNTRY
<b>KEY AREAS</b>						Entity/ Institution	country
Cotton Cultivation & Ginning	Hand spinning					CAZ	Zambia
		Plain Weaving	Dyeing process	Tailoring	Screen Printing techniques	FEMSEDA	Ethiopia
				Grading, Pattern Making & costume fit		FEMSEDA	Ethiopia
Fibre Quality Testing	Yarn Quality Testing	Fabric Quality Testing	Colour matching and dyeing standards testing	Garment Quality checking		Textile Institute	Ethiopia
		Dobby , Textures & Finishing, Fabric Manipulation				Textile Technologists, NIFT, NID	India
	Spinning in Multi Head motorized spindles					Micro Spinners	India

Advanced Knowledge on Cotton						central institute for cotton research	India
		Textile Designing		Basic Fashion Designing		Private Textile & Fashion Technologists, NID, NIFT	India
Mill and production floor management & supervision				Train in Garment Unit product floor management & supervision		SITRA for Mills, Apparel Training & Design Centre, ATDC	India

#### 5.4.2. Business Functions

Only critical topics or disciplines that are relevant in an entrepreneurial environment have been taken for active support. Entrepreneurship development is also covered under this component/module and it covers number of key topics such as financial literacy, leadership skills, business policies and commercial practices.

Some of the disciplines relating to professional and specialist categories should be available in Zambia and therefore it would be practical if local firms and agents are considered for strengthening the knowledge and skill sets of the cluster members in those areas.

SOUTH - SOUTH PARTNERSHIP IN ENTERPRISE DEVELOPMENT		
KEY AREAS	ENTITY/INSTITUTION	COUNTRY
Entrepreneurship Development - Master's training	Entrepreneurship Development Institute	India
Organizational Development	OD specialists	Zambia
Computer literacy, social media & digital marketing	Digital & net specialists	India
Training merchandising, Client Management and Liaison	Senior Merchandisers	India
Trend forecasting, market research, intelligence and analytics	Business intelligence & Analytics specialists	India
Planning & conducting Trade Promotions and Trade Missions	Trade Promotion Specialists	India

#### 5.4.3. Textile Machinery Manufacturing

The principle focus will have to be on indigenizing the technical knowledge that is needed for manufacturing spindles and looms within the country. Many of the other technologies used by the core ecosystem are pretty high end and will have to be necessarily imported as other textile dominant nations do. Zambia will not need most of these high end technologies nor is there a need for them to become self-sufficient in the manufacturing of textile machinery. Exception however will have to be made in the case of testing equipment that are considered as default features across the entire core spectrum

SOUTH - SOUTH PARTNERSHIP IN TEXTILE TECHNOLOGIES, TOOLS & MACHINERY MANUFACTURING							
COTTON CULTIVATION	SPINNING	WEAVING KNITTING	PROCESSING	STITCHING	VALUE ADDITION	POTENTIAL PARTNERS	COUNTRY
KEY AREAS						Entity/Institution	country
	Hand spindle Engineering	Hand Loom engineering	Hank dyeing, boilers		Screen Printing frames, wooden block making	FIVE P, Tool rooms technologists	India
	Hand spindle Engineering	Hand loom engineering				FSMMIDA	Ethiopia

### 5.5. ESG Standards

There is no denying the fact that the Industrial world is shifting from “red economics” to “green economics”. This is happening at all levels, from consumers to policy makers. It is critical that the plans embed the virtues of ESG standards as leaving it for a later date can get a bit messy. Some of the ESG standards are very structural and will therefore have to be included in the planning stage itself. For instance the type of materials used, the area allotted and the location of utilities and storage facilities to name few will have to be well thought out upfront so that they don’t stick out like an afterthought.

SOUTH-SOUTH PARTNERSHIP IN ENVIRONMENTAL, SOCIAL & GOVERNANCE STANDARDS -ESG			
KEY AREAS		ENTITY/ INSTITUTION	COUNTRY
<b>Eco Labelling</b>	Environmental compliance across product’s life cycle and production life cycle has evolved substantially in India.	Private consultants	INDIA
<b>Effluent Treatment</b>	India has taken a leadership position in managing Effluent Treatment with the help of zero Liquid Discharge. It has world’s largest Common Effluent Treatment The technology used in Kanoria is developed in India. The proposed cluster at Mumbwa should include this in its plan. At this stage, it may not matter much, but as volume of production goes up, ZLD will become a necessity. India also has substantial exposure to standards like REACH and OEKOTEX	Private Consultants	INDIA
<b>Green Energy</b>	Zambia which uses hydro power may still be offering better standards in the area of carbon emission, but some directions should be made visible to the Industry. India has taken some leadership in renewable energies	Private Consultants	ZAMBIA INDIA
<b>Governance Standards</b>	Corporate Governance standards should already be in place through regulatory and statutory measures	Private consultants	ZAMBIA
<b>Audit, Inspection &amp; Certification</b>	Factory Audit and Inspection should be made a part of the process the cluster would adopt with respect to meeting global standards. Even though exports are not going to be given focus initially, setting a direction in ESG will enable ZAMBIA to sensitive the industry to emerging norms	Private consultants	INDIA
<b>Factory Compliances</b>	Utilize Zambia’s institution with understanding of State’s Regulatory norms on Factory standards	private consultants	ZAMBIA

## **5.6. Market Development**

The market development process has been split into domestic, regional and international stages as Zambia will need at least a year or two before it gains the capacity to serve regional and international markets.

In the area of market development, Zambia will need Knowledge and skills that are textile oriented.

India has a long history of exports and with domestic markets gaining size and momentum, there has been a great deal of innovation in the area of domestic marketing too. This usually comes with years of experience in the sector as the market development nuances are quite different from the generic models followed by other sectors like the FMCG- Fast Moving Consumer Goods.

### **TARGET MARKET**

Target market definition requires a good understanding of how to identify opportunities from the readiness level of the home market. In the case of Zambia, the first market to target would be the domestic market.

### **TRADE DEVELOPMENT MEASURES**

Trade development calls for high level strategic measures with a good understanding of factors like NTM, NTB and different types of FTAs, starting from MFN to Integrated economies. Having trade facilitation centers to enable SMEs get past the complex web of international trade would go a long way in helping SMEs overcome the risks and challenges associated with international trade.

### **PROMOTIONS**

In the case of promotions, a mix of knowledge and skills would be needed to keep the promotional measures dynamic and relevant. The type of skills and knowledge with respect to digital and social media technologies, trade missions, international fairs and sales are as varied as they come.

### **CHANNELS**

Most of the retail channels in textiles belong to South African brands. Standalone shops are few and far between. Unless there is a strong network of retail interface, reaching the products to end customer may prove to be quite a task. Building channels require specialist skill sets.

### **MARKET INTELLIGENCE**

Gathering information about target markets should be made an integral part of market development work. This again calls for specialist skills as business intelligence and analytics fall within the combined realm of IT, Business Process, CRM and Marketing.

SSC PARTNERSHIPS IN MARKET DEVELOPMENT			
STAGES	SHORT TERM	MEDIUM TERM	LONG TERM
FOCUS MARKETS	DOMESTIC	COMESA+SAD REGION	INTERNATIONAL

TARGET MARKET	
<b>Conventional &amp; Non-Conventional Segments</b>	Hydra
<b>Brand Identity for Ethnic Wear</b>	Hydra
<b>focus market development</b>	Hydra

TRADE DEVELOPMENT	
<b>NTM and NTB Management Desk</b>	Hydra
<b>Intra-Regional Trade - Regional Value Chain</b>	Hydra
<b>Trade Facilitation Centres</b>	Hydra

PROMOTIONS	
<b>Social Media &amp; Digital Marketing</b>	Hydra
<b>Conventional Promotions</b>	Hydra
<b>Regional Initiatives - Fashion Week</b>	Hydra
<b>Fairs &amp; Exhibitions, Market Week</b>	Hydra
<b>Trade Missions</b>	Hydra
<b>Global Brand CSR Initiative</b>	Hydra
<b>Buyside market engagements</b>	Hydra
<b>Trade Alerts</b>	Hydra

CHANNELS	
<b>E-Commerce Platform</b>	Hydra
<b>Traditional Arts Village Centre - Haat</b>	Hydra
<b>Border Haat, Roadside Haat</b>	Hydra
<b>Handloom Showrooms &amp; Emporiums</b>	Hydra
<b>Boutique Retail Network</b>	Hydra
<b>Designer Entrepreneurship Network</b>	Hydra

MARKET INTELLIGENCE	
<b>Trend forecast and Analysis</b>	Hydra
<b>Market Research</b>	Hydra
<b>Business intelligence and HS Code Analytics</b>	Hydra

## 5.7. Institutional Infrastructure - Triple M

An industry requires a robust Triple M system to support its functioning, development and growth.

### 5.7.1. Macro Institutions

Comprise policy makers, regulatory bodies that set the directions and trajectory for the industry as a whole.

### 5.7.2. Meso Institutions

Comprises set of institutions that accelerate & sustain development and growth of the industry. The accelerators are mostly group specific represented by associations and communities.

### 5.7.3. Micro Institutions

Are highly capital intensive technologies & resource dependent systems that are core to the commercial functioning and success of an enterprise. These technologies and resources require scale to become viable and SMEs with poor scales and resource constraints would find them unviable and unaffordable. Industry associations either on their own or with the support of the Government could seek the participation of established enterprises under a business agreement or install these facilities under a PPP model.

The template in the following page, using the three time horizons and market focus to help the Textile Department chart its course in building these institutions.

## SOUTH-SOUTH PARTNERSHIP

KEY AREAS	ENTITY/ INSTITUTION	COUNTRY
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MICRO SYSTEM, ADMINISTRATION, MANAGEMENT & GOVERNANCE STRUCTURE		
Textile Design Centre	NIFT, NID	India
Design Studio and Prototype Development Centre	NIFT, NID	India
Training Centre	Indian Society for Training and Development FEMSEDA	India, Ethiopia
Tool Room	FEMSEDA	Ethiopia
Testing Laboratory	Textile Institute	Ethiopia
ICT INFRA centre	Hydra	India
Administration and Management Studies and Training	Administrative Staff College of India, ASCI.Org	India

MESO SYSTEM, ADMINISTRATION, MANAGEMENT & GOVERNANCE STRUCTURE		
centre of Excellence	SITRA, BTRA, NITRA, ATIRA	India
Textile Associations	SIMA	India
HR Exchange		

Entrepreneurship Development Centre	Entrepreneurship Development Institute	India
Women Entrepreneurship Training Centre	SEWA	India
Business Incubation Centre	National Design Business Incubator, NID	India
Innovation Lab	Indian Innovation Lab	India
Bonded Warehouse		
Administration and Management Studies and Training	Administrative Staff College of India, ASCI.Org	India

MACRO SYSTEM, ADMINISTRATION, MANAGEMENT & GOVERNANCE STRUCTURE		
Trade Promotion Board	HEPC	India
Sector Skill and Knowledge Development Board	ATDC	India
ESG Standards Certifying Agency	ZEMA, Third Party	Zambia, International firms
Department of MSME Development	Hydra	India
Pollution Control Board	Central Pollution Control Board	India
Investment Approval Board		
Cluster Development Agency	Hydra	India
Standards & Benchmarking Institute	Zambia Bureau of Standards	Zambia
Textile Policy Advisory Board	Administrative Staff College of India, ASCI.Org	India
Dialogue Mechanism	Hydra	India
Advocacy Channel	Hydra	India

## 5.8. Investment

There are 4 stages to the development of a business: Pre-start up, Start up, Small Business and Small Medium Enterprise. For a new business, crossing these 4 stages without facing any challenges in the financial front is like asking for the impossible. The challenges faced by SMEs in finding access to finance are disproportionately higher in comparison to what larger enterprises face. This leaves many of the SMEs having to find their own funds from the start up stage with very little realization of the financial demands that lies ahead when business enters the growth stage. This leaves even the successful ones choking for

funds when it is needed the most. This choking often results in many SMEs folding up as the overheads by then would have scaled up to support a growth situation. The challenge of access to funds was expressed as a major impediment to starting a business by the entrepreneurs who attended the training in Zambia. SMEs need quality financial advisory services at very affordable costs. If possible, as a part of the cluster development initiative, Zambia should consider subsidizing financial advisory services for SMEs. This has assumed greater significance than ever before with Basel III standards increasing the share of core tier 1 capital holdings increasing the pressure on banks to move away from riskier investments that SMEs are seen as.

If private equity has to flow in to service the SME sector, then there has to be a strong regulatory and supervisory system in place supported by strong financial infrastructures comprising legal systems, credit information bureau, insolvency laws, payment systems and secured transactions procedures to name a few. These measures will go a long way in creating a highly conducive environment for investments to find SMEs as safe and profitable as any in the formal and organized sector to service.

In addition to conventional ways of raising funds, new opportunities have emerged in the area of venture funding, that puts a premium on innovation and new age technologies. This trend has created a whole new approach by placing the emphasis on planning the entire business roll out to meet the intended destination from the pre-start up stage. This calls for a good understanding of the 4 stages of business development, which is Proof of Concept, Proof of Product, Proof of Business and Proof of Profits. SMEs will have to assist in getting acquainted with the ways of an investment environment where innovation takes centre stage.

The knowledge and skill development in the area of Investment should have these topics addressed with the support of SSC partners indicated under the policy section

- Policy Direction
  - Financial Inclusion strategy/ Insolvency laws/ Protection of Investors
- Regulatory & Supervisory system
  - Secure Transactions
- Financial infrastructure
  - Credit Evaluation and Reporting/ Due Diligence – KYC-Know Your Customers/ Performance Data/ Predictive Analysis/ Risk Management/Insurance
- Product, Service and Solution
  - Lend-Lease / directed Access/ Subsidies/Working capital and Term loan/ Factoring / Credit Guarantee, Government Schemes & Initiatives
- New Age Funding
  - Private Equity, Venture Funding, Angel investments, crowdfunding, SME Exchange for Initial Public Offer, Growth and Innovation funds.

SOUTH - SOUTH PARTNERSHIP IN SME INVESTMENT		
KEY AREAS	ENTITY/INSTITUTION	COUNTRY
Policy Direction	Financial Institutions	Zambia
	FICCI, CII	India
Financial infrastructure, Regulatory & Supervisory System	Ethiopian investment council	Ethiopia
Product, Services & Solutions	SIDBI, NABARD, Rural Infra, HEPC	Zambia

SOUTH-SOUTH COLLABORATION – COOPERATION FRAMEWORK

New Age Funding	Venture Funding Org	Zambia, India
Government Schemes & Initiatives	Hydra	India





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