



Study Tour and Seminar on Special Economic Zones in Mauritius

Report and Recommendations

Date: 10-12 October 2023

Venue: Le Suffren Hotel & Marina,
Port Louis, Mauritius

I. Background

Ending poverty in all its forms is the first of the Sustainable Development Goals and an explicit objective of the national development strategies of many African countries. The progress towards poverty eradication on the African continent has so far been modest, despite a reasonable rate of economic growth in many countries. The analyses of the underlying economic causes of poverty point to a jobless nature of economic growth and a lack of structural transformation in African economies. It is against this background that the United Nations Conference on Trade and Development (UNCTAD) has developed a range of tools for building productive capacities and uses them to assist least developed and other developing countries in their quest for productive transformation.

Productive capacity development is at the centre of a 12th Tranche UN Development Account Project on “Coherent Strategies for Productive Capacity Development in African Least Developed Countries” that has been implemented by UNCTAD in Burkina Faso, Rwanda, and the United Republic of Tanzania since 2020. The project identifies several avenues for productive capacities development, including Special Economic Zones (SEZs), which are also referred to as industrial parks and zones. During the project implementation, SEZs were analysed as part of the national and regional capacity building workshops. To complement this analytical work, the project provided an opportunity for policymakers, SEZ authorities and private sector representatives from the beneficiary countries to visit countries that succeeded in leveraging industrial parks and zones for productive transformation and economic development. The study tour was complemented by a seminar and visits to selected industries, allowing for learning, sharing of experiences, and drawing lessons on SEZ regulation, design and operation that can inform policymaking in participating countries.

The first study tour was organized in Meknes, Morocco, in May 2023, for French-speaking countries. The second study, which is the subject of this report, took place in October 2023 in Mauritius and was organized by UNCTAD and the Economic Development Board of Mauritius for Rwanda and the United Republic of Tanzania. Representatives from Botswana and Zimbabwe were also invited to share their experience of developing and using SEZs. The activities undertaken as part this study tour and seminar as well as key messages emerging from them are summarized in this report.

Mauritius was chosen as the host country because it is one of the few countries in Africa with relatively high levels of productive capacities and industrialization. It is also one of the few countries in the region that have successfully used SEZs to foster productive transformation and export diversification. In this context, it is a very good and relevant case study that other African countries can draw lessons from in their quest to build productive capacities and transform their production and export structures.

II. Objectives and expected outcomes.

The objective of the study tour is to provide a platform for the delegations of Botswana, Rwanda, Tanzania, and Zimbabwe to hold discussions with policymakers from Mauritius and share experiences with them on the design, development, operation, and regulation of various types of SEZs with a view to drawing useful lessons on how to improve the performance of their domestic zones and parks.

The expected outcomes of the study tour and seminar were twofold: the first is to enhance policymakers' understanding of how to use special economic zones and industrial parks to foster productive transformation, and the second is to identify best practices in using special economic zones and industrial parks as instruments for promoting economic development.

To achieve these objectives the event was organised around three core activities: (1) study tour of industrial parks and zones in Mauritius; (2) a seminar on industrial parks and zones; and (3) a visit to selected industries in Mauritius. On the first day the delegations visited various SEZs and authorities involved in their design, development, operation and promotion, including the Economic Development Board (EDB) of Mauritius, Landscape Mauritius (a public company with the majority stake owned by the government, involved in developing and managing industrial parks), both located in Ebene Cybercity, followed by the Freeport Zone and the facilities of the Mauritius Freeport Development (MFD) Co Ltd (distribution and industrial logistics company) and the JinFei Smart City. The practical component continued the third day, with delegations visiting manufacturing facilities and having discussions with senior management and technical experts of these firms. The companies visited included Platinax Austral Ltd (plastic injection eyewear), RT Kints Ltd (vertically integrated circular-knits manufacturer), Stamati Ltd (luxury jewellery), and Livestock Feed Ltd (animal feeds manufacturer). To exchange experiences and cross-fertilize ideas, an interactive seminar was held on the second day and featured an opening session and substantive sessions that included presentations from UNCTAD, EDB and all delegations. Each country presentation provided an overview of SEZs in the country, their regulatory and financing frameworks, and challenges and opportunities. Following the presentations there were interactive discussions involving all participants. The programme of the seminar is provided in Annex A.

The participants at the seminar included representatives from Ministries, SEZs authorities and private sector associations from Botswana, Mauritius, Rwanda, United Republic of Tanzania, and Zimbabwe.

III. Key messages, recommendations and lessons learned

Following the study tours to industrial parks and zones, the seminar and interactive discussions, and the visits to selected industries, several key challenges, policy options and lessons learned

from the design, promotion, and operation of successful industrial parks and zones were identified. The key messages are summarized below.

Special economic zones should be linked with national development strategies.

Special economic zones are not an end in themselves. They are useful to the extent that they permit a country to address its national development needs and challenges. In this regard, SEZs should be regarded as a tool linked to a country's national development strategy. Integrating SEZ development into the national development strategy enhances the likelihood that it will be better used to support a country's overall development objectives. The national development strategy should provide a guiding light for the selection of sectors and other strategic choices made during the lifecycle of SEZ, particularly the design stage. This will help to ensure broader policy coherence, for example aligning education policy with the current and future skills requirements of firms and the labour market.

African countries should have a dynamic and strategic approach to development of special economic zones.

The development and operation of special economic zones is a journey of discovery. It is also a learning process and as such there is the need for flexibility and governments should be ready to adapt and respond to changes as they occur. For example, the world is changing rapidly, and this means that in developing special economic zones, African countries must be dynamic and strategic and consider new global trends such as climate change, technological progress, and shifting global value chains. The changing external trends and conditions need to be considered because most SEZs are outward oriented, supplying goods and services to export markets, and attracting investment from abroad. Examples: Mauritius proactively changed strategy when the Multifiber Arrangements were phased out. It also changed the fiscal incentives applicable to the companies operating as part of the Mauritian Freeport Zones from zero to 3 percent in alignment with the OECD guidelines. Currently some of the main challenges facing SEZs in Mauritius are rising labour costs and labour shortages, fierce competition from countries such as China, and resulting fall in number of firms in operations. To address these challenges Mauritius has quickly developed a strategy to target pharmaceuticals, green energy, and silver economy (products and services for people over the age of 50). These efforts are also part of an overall strategy to diversify into high value-added sectors to mitigate increased competition from Asian countries.

Provision of high-quality infrastructure is crucial for successful development and operation of special economic zones.

To operate special economic zones effectively there is the need to provide very good eco-system encompassing high-quality physical infrastructure and basic services such as water, electricity, and waste management. There is also the need for firms to have access to business and other supporting services such as well functioning financial system, insurance, IT & telecom services, as well as efficient customs procedures. Connectivity is also key, particularly for landlocked countries. In landlocked countries availability of dry ports, inter-modal transport facilities and

well-functioning transit routes reduce transaction costs and enhance the chance of attracting manufacturing investment. It was underscored that manufacturing activities are infrastructure and logistics heavy. The success of a zone specializing in manufacturing depends largely on the competitiveness of infrastructure. In this context, it is important that good quality and affordable infrastructure services are available in a zone before the zone begins operation. Mauritius is a very good example of an African country that has made substantial progress in ensuring that its industrial parks and zones are supported with a good ecosystem.

Smart Cities can also play a useful role in a holistic development of special economic zones as amply illustrated by the experience of Mauritius. Smart cities are mixed-use developments integrated in a Master Plan, focusing on innovation, sustainability, efficiency, and quality of life. They enable environment-friendly working, living and leisure space aiming at generating its own resources and providing for smart transportation and walkability solutions. Their objectives include: (1) promotion and co-ordination of the orderly and economic use and development of land; (2) proper management, development, and conservation of natural and man-made resources; and (3) promotion of targeted economic activities, FDI attraction, and strengthening the industrial and service base.

Political and macroeconomic stability are necessary conditions for the success of special economic zones in Africa.

One of the challenges facing African countries in the development, operation and management of special economic zones is how to maintain political and macroeconomic stability to enhance prospects of attracting much-needed investment into the zones. Often special economic zones are developed in an environment characterised by high uncertainty, both from a political and macroeconomic perspective. Such uncertainties increase country risk and premium and make it challenging for investors to invest in the zones. In this regard, there is the need for African countries contemplating setting up industrial parks and zones to do “first things first” by, for example, ensuring that they create a political and macroeconomic environment that is conducive to conducting business and investment. This is one of the lessons that other African countries can learn from the success of Mauritius in effectively using industrial parks and zones to promote industrialisation and economic development. From the perspective of the government, political stability is also important as it permits continuity of government policies and reduces the possibility of policy reversals which militate against planning and investment.

Building trust between the public and the private sector will enhance development of special economic zones in Africa.

To make special economic zones function properly the private sector must be interested in participating in the zones and governments have to provide appropriate regulation, incentives and infrastructure. There also has to be effective partnerships between the private and public sector, which is important because although governments enact policies it is the private sector that produces and trades. In this context, there is the need for frequent dialogues between both parties to ensure that governments have very good ideas of the needs and challenges of firms

and that firms can provide governments with useful and practical information on needed policy changes to foster firm growth and private sector development. The experience of Mauritius shows that transparency, regular communications with firms, and having rapid mechanisms in place to address identified constraints facing firms, e.g. through policy changes, are useful ways of building trust between the public and private sector. The Mauritian experience provides very good lessons in this area. When a company applies for a permit and it is sent to the relevant government department, if no response is received within a specified period, it is assumed to have been approved. This silent approval procedure ensures that the government responds rapidly to issues and concerns of firms, thereby enhancing trust between the public and private sector. Digitalisation of processes can also facilitate information sharing between firms and governments departments thereby enhancing transparency and trust between both parties.

Policy incoherence and lack of institutional coordination impede operation of special economic zones.

National policies should be coordinated to ensure that they are consistent with the goals of SEZs as well as other national development objectives. There are many government departments involved in the development, operation, and regulation of SEZs, and this often leads to disagreements amongst government departments regarding for example choice of appropriate policies. Customs departments often have views on SEZ development that are different from those of Ministries in charge of trade, industry, and investment promotion. Without an effective institutional framework for inter-ministerial collaboration, there are bound to be policy incoherence. In this regard, there is the need for African countries to establish workable and credible frameworks for collaboration and coordination across government departments to ensure that they do not work at cross purposes thereby jeopardizing the achievement of the goals of SEZ development. One of the lessons learned from the operation of successful SEZs is that effective institutional collaboration depends in part on a fair repartition of costs and benefits from SEZs, for example between local authorities and national authorities. The establishment of a coordinating department under the office of either the President or the Prime Minister can also contribute to enhancing inter-ministerial coordination of policies and programs.

There must be a clear delineation of roles among actors in the special economic zones to reduce frictions and avoid conflict of interest.

The development and operation of SEZ involve several key actors. Regulators are government agencies responsible for creating, implementing, and enforcing the legal and regulatory framework for SEZs. Developers are entities responsible for acquiring and developing the physical infrastructure and land within the SEZ. Operators are responsible for the day-to-day management and administration of the SEZ, including business development, infrastructure management, and stakeholder engagement. Finally, tenants are the businesses and enterprises that operate within the SEZ. There are various models for SEZ development. Some are led by the public sector, some by the private sector and others through public-private sector partnerships. Each of these models has been successfully adopted in several countries and so they are all feasible alternatives. What

is important is that efforts are made to ensure that the chosen model works given the needs and circumstances of the country.

The Rwandan experience shows the challenges that may arise when the various actors in an SEZ interact. First, it can be hard to ensure adherence to zoning in accordance with the Master plan prepared by the developer if tenants insist on specific land slots and make it a condition for investing in the SEZ. Second, challenges may arise regarding cost sharing among developer, operator, and tenants. SEZ operators require significant capital for infrastructure maintenance and are interested in cost sharing with tenants. This may contradict the objectives of the SEZ developer because higher costs for tenants undermine the competitiveness of their businesses, and hence the chance of the overall success of SEZs. In case of Rwanda, the challenge has been overcome by government allocating some budget for SEZ infrastructure maintenance.

Another important issue that must be addressed in setting up and managing a SEZ is how to ensure that roles played by the government do not create conflict of interest. For example, it does not make sense to have the same government department as an operator as well as a facilitator and regulator of the zones. It is also important to ensure that regulation is done in a manner that does not stifle the private sector.

Access to stable and affordable financing facilitates the development, operation, and sustainability of special economic zones.

The development and operation of SEZs require significant investments of various types that can be grouped into onsite infrastructure and offsite infrastructure. Onsite infrastructure refers to the physical facilities and utilities that are located within the boundaries of the SEZ itself. On-site infrastructure typically includes industrial facilities, utilities (energy, ICT and telecommunications, water, sewage treatment), transportation within the SEZ, business support services, and amenities, such as residential and recreational facilities. Offsite infrastructure refers to the infrastructure and services that are located outside the boundaries of the SEZ but are critical to its functioning, such as transportation links and utility connections. Off-site infrastructure is hard to finance. For example, in Tanzania there is a financing gap for off-site infrastructure and connectivity and availability of financing for this type of investments depends on budget approval by government and actual disbursement. The possible solutions to financing constraints related to on-site and off-site infrastructure include tapping into various financing options, such as commercial banks, governments, private equity funds and contracting companies under engineering, procurement, and construction (EPC) contracts.

Businesses located in SEZs require credit facilities for capital investment and so there is the need for new financing arrangements that permit firms to better access much needed capital for investment. Companies located in SEZs also need operating capital and trade finance. For example, an investor from Tanzania indicated that their garment exporting company is paid 6 months after it has incurred costs (a buyer has three months to pay after he or she received the order, and there is a three-month lead time for the manufacturer to complete the order once the buyer placed it). With such a long lag between when a firm incurs expenses and when it receives

revenue, firms are forced to rely on either their retained earnings or access to trade finance to operate.

Special economic zones must have a clear focus and be adapted to a country's needs and comparative advantages.

The development of a special economic zone is not a costless activity. It requires significant financial and human resources which are scarce in Africa. Therefore, it is important to have a clear focus and adapt the development of these zones to the country's development needs and comparative advantages. Often most African countries establish multi-purpose SEZs involving enterprises across various sectors: agriculture, manufacturing, and services. While this may be appropriate for some of the big economies, it may not be the most effective use of scarce resources in the small and less endowed economies. For such economies, a more targeted approach considering the endowments, technological capabilities, and comparative advantage of the country might suffice. For example, most African least developed countries are endowed with natural resources and have a comparative advantage in the production of agricultural products. For such economies, an initial focus of SEZs on agro-processing industries can provide a good basis for subsequent development of more advanced manufacturing industries in the medium-to-long term.

Economic criteria should play a pivotal role in the location of special economic zones.

One of the issues that African countries grapple with in setting up special economic zones is how to decide on the location of the zones. Often decisions on the location of these zones are made based on political criteria: for example, trying to ensure that each region has a zone. While representation is essential, it is equally important that the location of these zones consider the endowments, connectivity, and comparative advantages of the regions to ensure sustainability. Locating zones based on economic criteria will also ensure that firms located in the zones have easy access to required factors of production and inputs and can stay competitive. It also sends a clear signal to investors thereby stimulating their interest in investing in the zones.

Special economic zones should be made more inclusive than in the past.

Special economic zones should be used as a tool to promote industrialization and inclusive growth in Africa. To this end, it is important to ensure that they do not function as pure enclaves where only those with access to the zones derive benefits from it. Strengthening linkages between the zones and the local economies is one way to ensure that the benefits from the zones spill-over to other parts of the economy. There is also the need to ensure that local investors are provided as many benefits as foreign investors to foster the development of the local private sector and lay the foundation for robust economic growth. Furthermore, governments must provide adequate regulation and supervision of these zones to ensure that firms operating in the zones do not mop-up all gains from SEZ development, especially when public resources are used for provision of infrastructure and other essential services. Fostering social responsibility of businesses is one way to share the benefits of SEZ development and ensure that the local

community is not left out of the benefits. Making sure that co-owners, operators, and users contribute to the maintenance of common areas of SEZ is another way to ensure that firms operating in the area also share in the costs of operating the zones. The government should also adopt a smart approach to supporting firms in the zones. For example, there is the need for an exit-plan for non-performing firms to ensure that limited public resources are not wasted on inefficient activities.

Special economic zones can be a catalyst for addressing the missing middle challenge in Africa's enterprise structure.

Africa's enterprise structure is characterised by many small firms and a few large enterprises, with very limited medium enterprises. One of the reasons for this "missing middle" is the lack of firm growth which prevents small firms from transitioning into medium and large enterprises. Governments can support the growth of small firms in the SEZs through business support services and better and affordable access to finance. But the responsibility for firm growth does not rest principally with the government. Firms also must play their part through, for example, enhancing their productivity and competitiveness. They should also increase demand for their products through an expansion of their customer base. To this end, there is the need for domestic firms to differentiate themselves from other firms by continuously introducing new ideas and products into the market. This requires investments in research and development as well as technological innovation on the part of firms. Promoting joint ventures between local firms and foreign firms is one way to enhance the technological capabilities of local firms and enhance their competitiveness and growth.

Environmental sustainability should be fully integrated into development of special economic zones.

Sustainable practices help to preserve the planet for future generations and to protect the local environment where SEZs are located. The efficient use of resources in production (e.g. less chemicals and water for garments), adoption of renewable energy sources, and better waste management are all practices that can contribute to the creation of a circular economy that supports sustainable development. There is increasing pressure on companies from consumers to adopt sustainable practices and this is bound to alter our thinking of SEZs development, operation, and regulation. In this context, principles of sustainability should be integrated at the planning and design stages of SEZ development. Ensuring sustainability of SEZs requires joint efforts by all actors in the SEZs: developers, operators, tenants, regulators etc. In addition, to be environmentally sustainable, the on-site and off-site infrastructure provided by SEZs should be sustainable. SEZs that promote environmentally sustainable practices and appropriate infrastructure are more likely to attract investors than those that do not.

Availability, quality, and cost of labour are key considerations for investors in special economic zones.

Firms operating in an SEZ as well as prospective firms will have an incentive to invest in the zone if they are sure of having reliable, stable, and affordable access to skilled and unskilled labour. In principle, education and skills development of the workforce is one good way to ensure that firms have access to a good pool of qualified labourers. But this can be complemented through temporary migration perhaps in the context of regional cooperation initiatives. At the firm level there is also the need for firms to invest in training and education of the labour force. The necessary skill sets will shift over time and so continuous adjustment and adaptation will be required on the part of firms and policymakers in charge of education and skills policies. In the long-term, addressing the problem of skills shortages also requires revisiting the education curricula in universities to ensure that they reflect the needs of industries and the labour market.

African countries should better exploit the opportunities provided by regional integration for development of special economic zones.

The recent efforts at strengthening regional integration in Africa provide an opportunity for policymakers on the continent to position their SEZs to better harness the growing potential of the regional market. There are several companies in SEZs in Africa that source their inputs from outside the continent even though these inputs are available on the continent. One of the reasons for this is concern about quality and reliability of supplies. Another issue is concern about the ability of regional firms to meet the volumes demanded by producers in SEZs. Addressing these issues requires policy actions on several fronts. For example, governments should consider providing training to domestic firms on meeting quality and export standards. They should also provide support to firms in the value chain so that they can increase their supply capacity and be able to meet the volume requirements of firms in the SEZs. Development of port, road and warehouse infrastructure coupled with internet connectivity could also facilitate creation of linkages between firms in SEZs and the regional markets.

Conclusions and next steps

Overall, the seminar was very interesting and productive. Both the host country and the participating countries expressed deep appreciation to UNCTAD for the event which they found achieved its objectives of enhancing policymakers' understanding of how to better use special economic zones and industrial parks to foster productive transformation and development.

Regarding next steps, participants expressed a need for UNCTAD to assist them in better understanding the best practices and approaches in drafting and enforcing legal, regulatory, and institutional frameworks for SEZs and ensuring that stakeholders from a broad range of institutions and the private sector are on board. It was also pointed out that high-level political support is instrumental for the success of SEZs and that securing the necessary financing for their

establishment and maintenance was necessary. Concerning the design and the strategic orientation of SEZs, participants were interested in receiving assistance from UNCTAD on the elaboration of SEZs Masterplan, provision of a guideline and framework for SEZs development in Africa, and an identification of untapped opportunities that would allow countries to leverage their endowments and comparative advantage for making SEZs work for the continent.

Furthermore, participants expressed a need for UNCTAD assistance in helping their countries to develop well-functioning special economic zones and better leveraging their potential as a tool for achieving industrial transformation and economic development. UNCTAD indicated that it will prepare a project proposal on SEZs, to respond to these requests, and explore options to mobilize funding for it from interested donors.

Annex A. Final Programme

Tuesday, 10 October 2023 *Study Tour of Industrial Parks and Zones*

08.30 – 09.00	Welcome and introduction
9:00 - 13:00	Meeting with Economic Development Board & Landscape Mauritius and Site Visit at Freeport Zone
09.00 – 10:00	Meeting with the Economic Development Board Mauritius (CEO and DCEO) Level 4, 7 Exchange Square, Wall Street, Ebene 72201
10:15 – 11:00	Presentation by Landscape Mauritius on their services offered and opportunities, challenges lessons learned on Industrial Parks and Zones 7 th Floor, Wing A, Shri Atal Bihari Vajpayee Tower
11:15 – 12:15	Site visit at Freeport Zone - Mauritius Freeport Development, Mer Rouge, Port Louis Freeport Zone 5, Mer Rouge, Port Louis
12:30 – 13:15	Site visit at Freeport Zone – Decathlon, Mer Rouge, Port Louis
13:15 – 14:15	Lunch break
14:15 - 17:00	Continuation of study tour:
14:30 – 15:30	Site visit at Riche Terre Business and Industrial Park
15:30 – 16:15	Site visit at Jin Fei Smart City Terre Rouge
End of first day	

Wednesday, 11 October 2023

Seminar on Industrial Parks and Zones

Venue: Le Suffren Hôtel & Marina, Caudan Waterfront, Port Louis

Opening session

09:00 – 09:15	Remarks by Mr. Patrick Osakwe , Chief of the Trade, Poverty, and Inequalities Branch at UNCTAD
09:15 – 09:25	Remarks by Mr. Wilson Mwansule Lugano , Director of Industrial Development, Tanzania
09:25 – 09:35	Remarks by Mr. Fred Mugabe , Ag. Director General for Industry, Promotion, Entrepreneurship Development, Ministry of Trade, and Industry of Rwanda
09:35 – 09:45	Remarks by Mr. Geerish Bucktowonsing , Director - Industry, Economic Development Board Mauritius
09:45 – 10:00	Coffee break

Substantive session

Moderator: Mr. Patrick Osakwe, UNCTAD

10:00 – 10:30	Special economic zones and transformation in Africa, by Ms. Olga Solleder , Economic Affairs Officer, UNCTAD
10:30 – 11:00	Interactive discussion
11:00 – 11:30	Industrial Parks and Zones in Mauritius: opportunities, challenges and lessons learned, by Mr. Sachin Mohabeer , DCEO of EDB Mauritius
11:30 – 12:00	Interactive discussion
12:00 – 13:30	Lunch break
13:30 – 14:00	Experience with special economic zones and industrial parks in Tanzania by Mr. James Francis Maziku , Director of Promotion and Facilitation - EPZA
14:00 – 14:30	Interactive discussion
14:30 – 15:00	Coffee break

Substantive session (continued)

15:00 – 15:30	Experience with special economic zones and industrial parks in Rwanda by Mr. Naphtal Kazoora , Division Manager of Special Economic Zone/Rwanda Development Board
15:30 – 16:00	Interactive discussion
16:00 – 16:30	Special economic zones and industrial parks in Botswana by Ms. Orekolotse Anne Koloji , Consultant-Strategy and PMS
16:30 – 17:00	Special economic zones and industrial parks in Zimbabwe by Mr. Kelvin Anesu Mutede , Principal economist, Ministry of Industry and Trade
17:00 – 17:20	Interactive discussion
17:20 – 17:30	Wrap up and closing remarks

End of second day

Thursday, 12 October 2023 *Visit to Selected Industries*

09:00 – 12:00	Visit to local manufacturing companies
09:00 – 10:15	Plastinax Ltd (sunglasses)
10:30 – 12:00	RT Knits Ltd (t-shirts, polo shirts)
12:00 – 13:30	Lunch break
13:30 - 17:00	Continuation of visit to local manufacturing companies
14:00 – 15:15	Stamati Ltd (jewellery)
15:45 – 17:00	Livestock Feed Ltd (animal feed)

End of visit

Annex B. List of Participants

Name	Affiliation	Gender	E-mail
Botswana			
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Mauritius			
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