



05-014-Aafr-ST\_en\_it

**SCHEMA PROGETTO**

<b>Codice</b>	<b>05-014</b>
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<b>Titolo</b>	Valutazione eventi Meet in Africa e identificazione di un'idea progettuale per il "Made in Africa"
<b>Data inizio</b>	01-10-2003
<b>Data fine</b>	30-09-2005
<b>Area Geografica coinvolta</b>	Africa
<b>Paese coinvolto</b>	Sudafrica, Marocco, Tunisia, Etiopia, Egitto, Kenya, Senegal, Mali
<b>Area-Località di svolgimento</b>	Johannesburg, Cape Town, Casablanca, Fez, Tunis, Addis Ababa, Cairo, Nairobi, Dakar, Bamako
<b>Settore</b>	Pelle e prodotti in pelle
<b>Tipo di Progetto</b>	Valutazione dell'impatto della fiera panafricana Meet in Africa e costruzione delle linee guida per un progetto di <i>fashion design</i>
<b>Idea Progetto</b>	<ol style="list-style-type: none"><li>1. Valutazione dell'impatto della fiera sul mercato africano e internazionale</li><li>2. Creazione di una metodologia per la produzione di beni con contenuti di moda africana</li></ol>
<b>Obiettivi generali</b>	<ol style="list-style-type: none"><li>1. Ridefinire le linee guida per il sostegno alla fiera africana</li><li>2. Promuovere il <i>fashion design</i> con risorse locali</li></ol>
<b>Obiettivi specifici</b>	Offrire assistenza alle agenzie intermedie coinvolte nell'organizzazione della fiera per i successivi eventi biennali e identificare degli interventi di sostegno intermedi all'industria del settore che possano trovare sbocco e divulgazione durante gli eventi della fiera
<b>Tipo di attività svolte</b>	<ol style="list-style-type: none"><li>1. Fiera:<ol style="list-style-type: none"><li>a. Analisi dei dati statistici della fiera</li><li>b. Interviste ai partecipanti</li><li>c. Incontri con gli organizzatori</li><li>d. Rapporto</li></ol></li><li>2. "Made in Africa":<ol style="list-style-type: none"><li>a. Identificazione della metodologia</li><li>b. Rapporto sull'estetica africana</li></ol></li></ol>
<b>Valore del progetto</b>	Euro 625.000

<b>Finanziatori</b>	ITC
<b>Esecutori</b>	PISIE
<b>Partner</b>	AFLAI (associazione panafricana della filiera della pelle)
<b>Beneficiari</b>	Meet in Africa
<b>Responsabile PISIE</b>	Simone Cipriani
<b>Esperti coinvolti</b>	Carlo Milone

<b>File di progetto</b>	05-014-Aafr-ST_it
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<b>Note</b>	<p>Sono archiviati:</p> <ul style="list-style-type: none"> <li>a) il rapporto di valutazione del Meet in Africa con il dettaglio delle interviste in annesso</li> <li>b) I rapporto sull'estetica africana</li> </ul>
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	<b>Indice dei file</b>
04-014-Aafr-ST	Scheda progetto
2	Rapporto valutazione Meet in Africa
3	Annesso, rapporti delle missioni
4	Rapporto sull'estetica africana

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**Torino, Monday, 07 June 2004**

**FINAL EVALUATION OF MEET IN AFRICA**

**Principal: ITC**

**a- REPORT**

**b- ANNEX 1**

**(Resume of Contacts and Documents of the Evaluation)**

- Edit 4 -

**a- Report**

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## Acronyms

AFLAI – FACIC	African federation of leather and Allied Industries – Fédération Africaine du Cuir et des Industries Connexes
ASR-PCP-DAO	Association sous régionale des professionnels du cuirs. Peaux et dérivés de l’Afrique de l’Ouest
ASSOMAC	Associazione Nazionale Costruttori Macchine dell’Area Pelle (Italian Leather Sector Machine Manufacturers Association)
ATC	Association Marocaine de Tannerie
BICF	Bureau des Ingénieurs Conseils et Formateurs
CBI	Centro for Promotion of the Imports from Developing Countries
CDE	Centre of Development of the Enterprise
CFC	Common Fund for Commodities
CICES	Centre International du Commerce du Sénégal
CLIA	Coordinated Leather Industry Assistance
CMPE	Morocco Export Promotion Centre
CNCC	Centre National Chaussure et Cuir de Tunis
CNTC	Centre National Textile Cuir Chaussure et Jouet, Algeria
COMESA	Common Market for Eastern & Southern Africa
DTI	Department of trade and Industry of South Africa
ELIA	Ethiopian Leather Industry Association
ESALIA	Eastern & Southern African Leather Industry Association
ETA	Ethiopian Tanners Association
EU	European Union
FAO	Food & Agricultural Organisation of the United Nations
FEDIC	Fédération Marocaine des Industries du Cuir
FNCC	Fédération Nationale du Cuir et de la Chaussure, section de la Union Tunisienne de l’Industrie du Commerce et de l’Artisanat.
ICE	Istituto nazionale per il Commercio Estero (Italian Foreign Trade Office)
ITC	International Trade Centre
LIRI	Leather Industry Research Institute of the University of Grahamstown, South Africa
LLPI	Leather & Leather Products Institute of COMESA
MIA	Meet in Africa
MOU	Memorandum Of Understanding
NCC	The National Coordinating Committee (of MIA)
OM.BE.VI.	OFFICE MALIEN DU BETAAIL ET DE LA VIANDE
PAPEL	Projet d’appui à l’élevage, Sénégal
P.R .	Public Relation
PROINVEST	PROINVEST is an EU-ACP (Africa, Caribbean and Pacific) partnership program developed and undertaken by the European Commission on behalf of the ACP countries. PROINVEST, is financed by the European Development Fund (EDF).
SHLC	Skin Hides Leather Council in South Africa
SIC	Semaine du Cuir, France
SIMAC	International trade fair of the footwear and leather goods machines
SMEs	Small & Medium Enterprises
T.A.	Technical Assistance
TANNING-TECH	International trade fair of the leather tanning machines
UN	United Nations
UNCTAD	United Nations Conference of Trade And development
UNDP	United Nations Development Program
UNIC	Unione Italiana Industria Conciaria (the Italian Tanning Association)
UNIDO	United Nation Industrial Development Organisation
WB	World Bank
WTO	World Trade Organisation

## 1. INTRODUCTION

ITC prepared a summarised evaluation of its large scale project "Meet in Africa" which involves a biennial all Africa exhibition of leather products, buyers/sellers meetings, seminars and workshops, experts meetings and meetings of the African Federation of Leather and Allied Industry (AFLAI). Three events have already taken place: Cape Town (1998), Casablanca (2000) and Tunis (2002). The next event is planned in Addis Ababa (2004).

It is a large and complex evaluation to assess results and impact in all leather and allied products producers, to present the status and future of AFLAI, to assess financial results and perspectives and consequences in possible gradual phasing out of ITC and Dutch donor.

Under the guidance of ITC, an impact field study in African countries has been conducted by AFLAI, and it was completed by the end of October 2003. Based on the results of AFLAI, the ITC developed an international evaluation, including some missions to selected African countries to validate the previous study and to complement it, starting with a visit to Tunisia - present AFLAI secretariat, and included Ethiopia - next MIA in 2004.

The evaluator visited Tunisia, Ethiopia, Kenya, Morocco, South Africa, Senegal, and Mali, under the ITC scheduled official missions, and informally had briefings with some key actors in Egypt and Algeria.

## 2. EXECUTIVE SUMMARY

### PURPOSE OF THE PROJECT

The "Meet in Africa" (MIA) was established as the main axis of ITC cooperation in Africa for the leather sector. MIA is a project designed within the context of the Integrated Leather Sector Export Development Program for Africa (RAF/47/72), whose main objective is to assist the African leather sector in achieving sustainable growth through improved competitiveness and expanded trade with a social development impact in terms of employment. ITC created two pillars within the program: (1) the "Meet in Africa" (MIA) trade fair and seminar event; (2) the African Federation of Leather and Allied Industry (AFLAI).

### METHODOLOGY OF THE EVALUATION

A multiple method design, combining both qualitative and quantitative data, was used to ensure reliable and valid results. A comprehensive framework was developed to guide the evaluation, combining AFLAI survey study and independent consultation. Initially the evaluation was developed through an in-depth survey among the African business sector, carried-out by AFLAI, followed by the present independent evaluation. Consultant initiated several missions through the African market to contact key players. Objective of the interviews was to assess the impact of MIA events in each country where the fairs were realized: questions have been asked about the follow up projects, about the impact on the commercial aspects that have been consolidated, and how MIA could have modernized the African leather sector. The evaluation accessible through the following papers was obtained analysing the AFLAI survey, summarising the meetings between consultant and key players, and it is supported by analyses of various ITC preliminary and intermediate reports, in addition to other reports and comments received from entrepreneurs.

### KEY FINDINGS

The findings from the evaluation of this project provide evidence of perceived improvements in the consolidation of the trade fair since the implementation of MIA. Buyers now have access to a wider range of African enterprises to meet their needs. Direct access to trans African business relations has

facilitated the process requiring more sub-regional integration across the African continent. MIA seminars tentatively prioritised technical assistance activities, predicted outcome and future development opportunities. From a coordination perspective, ITC program tried to improve a number of complementary self-contained clusters of activities: preparation and implementation of the MIAs as a way to boost intra-African trade and African exports to international markets; strengthening the Internet site for African hides, skins and leather products; building and strengthening the capacity of sectorial institutions at national, sub-regional and regional level as well as promoting their networking; creating awareness on trade potential among SMEs and developing enterprise competitiveness. As a result, visitors to MIA are constantly increasing, from initial 1.000 of Cape Town to 2.200 of Tunis.

From the CLIA (Coordinated Leather Industry Assistance) perspective, certain aspects of technical assistance from international cooperation agencies and international donors were predicted to be coordinated between MIA and the leather sector. In addition, the AFLAI has advanced the role of selecting co-organiser countries and locations for each MIA event. Finally, MIA became market-centred according to an innovative criterion adopted to define weakness and opportunities, priorities, goals and instruments, essentially embodied to change the African leather sector being “product oriented” to explicitly “market oriented”, and entrepreneurs from all sub-sectors appear to be satisfied with MIA services provided.

The interviews demonstrate several success stories, including partnership developments, technical assistance and successful business, between them most relevant are those related to trans African trades. Twenty-four success stories have been recorded, two of them from the Cape Town 1998, nine experiences related to Casablanca 2000, and thirteen resumed by some participants of Tunis 2002. Business of different nature and technical assistance programs occupied entrepreneurs from Tunisia, Senegal, Mali, Morocco, Cameroon, Ethiopia, South Africa, Mauritania, Chad, Burundi, Algeria, Kenya, and Botswana between the African countries, and the EU, India and Brazil worldwide. Many business and technical assistance programs have been designed between African countries, with fifteen examples gathered from the interviews. About ten trans-national follow up projects designed between African enterprises were pure trade business, and five were technical assistance programs that saw North African partner on one side, and Sub Saharan promoters on the other side. Interviews underline that trans African contacts were developed with MIA for the first time, since business between Africans of different countries is not common.

Challenges remain despite these positive accomplishments. Some of the challenges include: (a) the efficiency of the MIA referral process from cooperation grant to private management which is compromised by mandatory AFLAI association to be the predicted agency enabled to manage MIA (as prediction). Set up of a trans-African leather cluster network remains an issue, AFLAI responsibilities are unclear and implementation of cluster networks at national/regional levels continue to be the primary intervention approach across all African countries related to the sector. Insufficient human resources, lack of communication, unpredicted differences expressed by different sub-sectors or markets, and non homogeneous rules played in their local networks by the professionals embodying the AFLAI panel, were the most commonly reported barriers to network coordination services delivered by AFLAI; (b) the difficult to deliver differentiated entrepreneurial sectors in the appropriate environment, between trade fair divisions and company matching activities. The time allowed for the preliminary identification for the company matching between buyers and sellers was insufficient. The selection was produced only one or two days before the date of the meetings. The profiles were not sufficient especially for international clients. It was difficult to rate the impact of the problem on function for clients who were in the process of selecting proper complementary partners, as promised by means of a specifically supported activity named “buyers and sellers meeting”.

Data sources recognized certain advantage of MIA’s competitive position between the trading events of world leather and footwear market, when compared to the poor performance of the African leather/footwear manufacturing cluster in the world context. However a benchmarking exercise shows that further improvements must be achieved in order to get sustainable MIA trade fairs, mainly increasing the level of specialisation of the promotion and preliminary organisation to get more buyers both from Africa and the international market. These shortcomings provided numerous suggestions of

ways to get MIA trade fairs sustainable in view of its privatisation. Starting from entrepreneurs' point of view, the most frequently mentioned suggestion was the need of an increasing in the level of professional resources across all sectors. Detailed suggestions included the creation of an independent executive agency managed by some key players of the sector in Africa, possibly in joint venture with a commercial trade fair organisation already existing in Africa, and the rehabilitation of a leather cluster network by means of an intermediate agency fully autonomous and independent from the regional and national leather networks. The services of the trans-national cluster should be the consequence of the services and resources of the regional partners, but should not impede the services of some local and regional organisations, or single enterprises as well, operating throughout the cluster. Therefore, rather than providing new services, existing regional services are to be harmonised, in order to be opened to enterprises of the partner regions.

**Box 1 SWOT figure: Meet in Africa trade fair and project management**

STRENGTHS	WEAKNESS	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Positive trend</li> </ul>	<ul style="list-style-type: none"> <li>• Weakness of the present African cluster network agency</li> </ul>	<ul style="list-style-type: none"> <li>• Increasing number of buyers</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult availability of organisational skills</li> </ul>
<ul style="list-style-type: none"> <li>• European links</li> </ul>	<ul style="list-style-type: none"> <li>• Limited communication</li> </ul>	<ul style="list-style-type: none"> <li>• Specialisation of follow up</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of free market</li> </ul>
<ul style="list-style-type: none"> <li>• Logistic</li> </ul>	<ul style="list-style-type: none"> <li>• Limited number of buyers</li> </ul>	<ul style="list-style-type: none"> <li>• Expanding cooperation with public and private</li> </ul>	<ul style="list-style-type: none"> <li>• Obsolete SMEs sector</li> </ul>
<ul style="list-style-type: none"> <li>• Funding</li> </ul>	<ul style="list-style-type: none"> <li>• Limited connection with other parts of the world except Africa and Europe</li> </ul>	<ul style="list-style-type: none"> <li>• Get a joint venture trade fair</li> </ul>	<ul style="list-style-type: none"> <li>• Hidden informal sector</li> </ul>
<ul style="list-style-type: none"> <li>• Cooperation network</li> </ul>	<ul style="list-style-type: none"> <li>• Missing important African countries: one for all Nigeria</li> </ul>	<ul style="list-style-type: none"> <li>• Promote cluster networks starting from countries and regions</li> </ul>	<ul style="list-style-type: none"> <li>• Scarce commitment due to external T.A. management</li> </ul>
<ul style="list-style-type: none"> <li>• Private and public dialogue</li> </ul>	<ul style="list-style-type: none"> <li>• Insufficient follow up</li> </ul>	<ul style="list-style-type: none"> <li>• Improve international links</li> </ul>	<ul style="list-style-type: none"> <li>• Changing the trade and production focus from developed countries where Africans entrepreneurs have solid connections, to new developing countries, unknown to Africans</li> </ul>

**SUMMARY**

Final report included:

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## **3. EVALUATION FRAMEWORK**

### **African survey by AFLAI and consultancy**

#### **3.1 PURPOSE OF THE EVALUATION**

The evaluation is aimed to assess results and draw lessons from the past to identify the conditions to make the biennial “Meet In Africa” (MIA) leather event self-sustainable and also to recommend a road map for future development as of 2006 entrusting the African Federation of Leather and Allied Industry (AFLAI) with the responsibility for taking over its organization as of 2006.

The evaluation was developed through an in-depth survey among the African business sector carried-out by AFLAI and later the present independent evaluation, carried out by a consultant appointed by ITC in collaboration with the AFLAI presidency.

#### **3.2 BACKGROUND AND JUSTIFICATION**

ITC approach to the promotion development of an export improvement program for the leather industry in Africa started in 1996 (project INT/47/57) with the goal of creating technical capability to coordinate assistance projects in the African continent. ITC created two pillars within the program:

1) The “Meet in Africa” (MIA) trade fair and seminar event that has become a well known international event and it is now attracting a large number of businessmen from Africa and overseas. Nevertheless it is still in its development stage lacking certainty of continued African participation. The MIA events consist of a series of experts’ and professionals’ meetings, conferences, workshops, and buyers/sellers meetings organized around the main activity, the Meet in Africa exhibition.

2) the African Federation of Leather and Allied Industry (AFLAI), the only entity representing the whole African leather sector. The AFLAI was created by an initiative of ITC and formally established during the first MIA event in Cape Town in 1998. The AFLAI has been cooperating since then with ITC in organizing the events, through its network of sub regional members, especially for promoting, mobilizing and coordinating African participation.

Since 1996, the Africa leather program has been implemented with major contributions provided by the Government of the Netherlands through CBI. Other contributions either in funds, or in kind (research, logistical support, etc.) have been supplied by organizations such as the Semaine Internationale du Cuir (SIC), the National Association of Italian Footwear, Leather Goods and Tannery Machines (ASSOMAC), the Common Fund for Commodities and FAO, or UNIDO. A growing source of revenues comes from the MIA exhibitions themselves (registration fees, rental of stands, interest). The total expenditures of the program and related activities in Africa between 1996 and 2003 can tentatively be estimated at about US\$ 4.7 millions.

#### **3.3 SCOPE OF THE EVALUATION**

The evaluation concentrates its research and review on the years 2000 to 2003 during which two MIA fairs took place, and on the future development of the MIA concept, starting with the 2004 MIA in Addis Ababa. In addition, the evaluation needs to build on the findings and recommendations of the 1999 evaluation that reviewed the preparatory work of the program, the organization of the first fair in Cape Town, and the building blocks of AFLAI.

The evaluation also assess the gradual building up of AFLAI capacities, of sub regional and National trade associations with regards to their taking over the responsibilities that have been originally entrusted to the program and the possible sustainability of the present system to continue promotion and development.

## 4. EVALUATION METHODOLOGY

### Methodology, Documents reviewed, AFLAI survey, field visits

#### 4.1 METHODOLOGY

After the first phase of acknowledgment, the evaluator started several missions throughout the African market to contact key players, like private entrepreneurs, sector managers, and service agencies.

##### 4.1.1 FIELD VISITS:

The first mission has been to Tunis, location of AFLAI. The second has been Kenya, location of ESALIA (Eastern & Southern African Association) that is representing ten countries of the Southern and Western (ESALIA; list of member countries: 1. Uganda Leather and Allied Association, 2. Ethiopia Tanners Association, 3. Kenya Tanners Association, 4. Eritrean Leather and Allied Industries Association, 5. Leather Industries Association of Zambia, 6. Leather Association of Tanzania, 7. Leather Association of Malawi, 8. Leather Chamber of Sudan, 9. Leather Industries Association of Namibia, 10. Leather Institute of Zimbabwe). After Kenya the mission went to Ethiopia, host country for MIA 2004, organised in partnership with ETA (Ethiopian Tanners Association) and ELIA (or E.T.F.S.G.M.A.), the Ethiopian Leather Industry Association. In Morocco the local Leather field Association (FEDIC) and some stakeholders have been met, and interviewed about the past MIA of Casablanca (2000). South Africa has been visited related to the opening event in Cape Town (1998). Between other regions of Sub-Saharan Africa, Senegal and Mali have been selected for their participation and involvement in the AFLAI and ITC support to the MIA events. Algeria and Egypt have been contacted, as preferred countries for the EU, for their important role, in perspective, within the trading cooperation between the Mediterranean countries of Europe and Africa

##### 4.1.2 EVALUATION FRAMEWORK

Objective of the interviews were to assess the impact of MIA events in each country where the fairs were realized: questions have been asked about the follow up projects, about the impact on the commercial aspects that have been consolidated, and how MIA could have modernized the African leather sector, characterised by stagnation and weakness. Weakness depending on lack of working capital, lack of technical skills, poor product quality and design, inappropriate marketing strategies, lack of adequate managerial and marketing skills.

**Lack of Working Capital** – Most commercial banks in Africa offer finances to industries at extremely high interest rates and, because of that, there is no incentive on the part of the business to procure the loans and this is one of the reason of the slow and poor growth of the Industry. Most industries are indigenous and do not have the strength to negotiate outside Africa like most multi-Nationals do.

**Lack of Technical Skills** – Many existing technical training institutes within the region, that train in leather products manufacture, lack the basic equipment and tools to offer adequate modern training in product design, efficient production processes etc.

**Poor Product Quality and Design**– Due to lack of proper skills and basic equipment and general information about fashion trends, the leather goods factories end up producing products that are not required by the market as they lack in terms of quality and fashion.

**Inappropriate Marketing Strategies** – Most leather products manufacturers lack proper marketing mechanisms intended not for “niche” market but for “the general market”.

**Lack of adequate managerial and marketing skills**– Most of the leather products businesses are run on entrepreneurial basis. The owner/founder is also the manager who grows as the business grow

and who, in most cases, is accustomed to “doing things his way” which in most cases is not the right way. Given the African socialist culture, it is common to find relatives working in the businesses not because of proper qualifications but because of cultural inclinations, which bring about trust and loyalty.

### **4.1.3 EVALUATION PROCESS**

Analysis of the impact of MIA as reported by AFLAI and meetings with the key actors in the countries where MIA had been/will be organized:

#### **4.1.3.1 THE NATIONAL COORDINATING COMMITTEE (NCC) THAT WAS IN CHARGE OF THE ORGANIZATION OF THE EVENT**

Briefing about the set up and the final realization of the MIA events: the problems, milestones and outcomes of the organization. The role played by the local intermediate agencies or allied institutions that sufficiently/not sufficiently supported the trade fairs and seminars events. The level of communication articulated between the stakeholders and the predicted Executive Agency (AFLAI).

#### **4.1.3.2 THE LOCAL ASSOCIATIONS INVOLVED**

Evaluation report of the impact of the MIA trade fairs and follow up activities, analysing the level of satisfaction achieved by entrepreneurs between several African countries.

#### **4.1.3.3 SOME LOCAL COMPANIES THAT HAD POSITIVE FOLLOW UP DUE TO THE MIA EVENT**

Briefings about the follow up project or the new trades developed because of MIA.

#### **4.1.3.4 ANY OTHER MEETING WITH RELEVANT INSTITUTIONS OR PRIVATE ENTREPRENEURS THAT MAY BE OF INTEREST FOR THE EVALUATION OF THE EVENT IN OBJECT**

There have been meetings with entrepreneurs, social capital of the cluster, but also with the intermediate agencies, financing institutions, State bodies designed to promote and support the sector, training institutes etc...

## 4.2 DOCUMENTS REVIEWED

5/8/99; Evaluation; Cape Town 98; El Mokadem  
 12/12/00; Evaluation; Casabalnca 2000; ITC  
 1/10/03; Evaluation; MIA 2002; BICF  
 30/9/03; Questionnaire ; ABAY Tannery; Private  
 enterprise  
 30/9/03; Questionnaire ; Abon Kone; Private enterprise  
 30/9/03; Questionnaire ; Ambessa Shoe; Private  
 enterprise  
 30/9/03; Questionnaire ; atelier de maroquinerie; Private  
 enterprise  
 30/9/03; Questionnaire ; CMC Negoce; Private  
 enterprise  
 30/9/03; Questionnaire ; CNCC; Training Institute  
 30/9/03; Questionnaire ; Compagnie Mediterran. Du  
 Commerce; Private enterprise  
 30/9/03; Questionnaire ; COOPERATIVE tanneur  
 chad; Private enterprise  
 30/9/03; Questionnaire ; CTCP; Private enterprise  
 30/9/03; Questionnaire ; DIRE; Private enterprise  
 30/9/03; Questionnaire ; ELICO; Private enterprise  
 30/9/03; Questionnaire ; ETH Sung Bin; Private  
 enterprise  
 30/9/03; Questionnaire ; Ethiopia leather; Private  
 enterprise  
 30/9/03; Questionnaire ; Fil Rouge; Private enterprise  
 30/9/03; Questionnaire ; FNCC; Association  
 30/9/03; Questionnaire ; Gaafar; Private enterprise  
 30/9/03; Questionnaire ; Griffé Yves; Private enterprise  
 30/9/03; Questionnaire ; Gringo leather; Private  
 enterprise  
 30/9/03; Questionnaire ; Hafde; Private enterprise  
 30/9/03; Questionnaire ; Hayet leather; Private  
 enterprise  
 30/9/03; Questionnaire ; jancel; Private enterprise  
 30/9/03; Questionnaire ; JM Esperabe; Private enterprise  
 30/9/03; Questionnaire ; Kgalagadi; Private enterprise  
 30/9/03; Questionnaire ; LAMIA; Private enterprise  
 30/9/03; Questionnaire ; Look; Private enterprise  
 30/9/03; Questionnaire ; MACVIL; Private enterprise  
 30/9/03; Questionnaire ; MAMEX; Private enterprise  
 30/9/03; Questionnaire ; Maroquinerie Mustafa  
 Abdelhedi; Private enterprise  
 30/9/03; Questionnaire ; Maroquinerie Zina; Private  
 enterprise  
 30/9/03; Questionnaire ; modern Zege leather; Private  
 enterprise  
 30/9/03; Questionnaire ; Modjo; Private enterprise  
 30/9/03; Questionnaire ; MVL Cuir; Private enterprise  
 30/9/03; Questionnaire ; New Scieffic; Private enterprise  
 30/9/03; Questionnaire ; PIDIEI Maghreb; Private  
 enterprise  
 30/9/03; Questionnaire ; Rata Shoes; Private enterprise  
 30/9/03; Questionnaire ; Sabelle; Private enterprise  
 30/9/03; Questionnaire ; SCIAC; Private enterprise  
 30/9/03; Questionnaire ; SCOTT; Private enterprise  
 30/9/03; Questionnaire ; SIMAP; Private enterprise  
 30/9/03; Questionnaire ; SMPCP; Private enterprise  
 30/9/03; Questionnaire ; Soplast; Private enterprise  
 30/9/03; Questionnaire ; SOVEPAC; Private enterprise  
 30/9/03; Questionnaire ; TAMAK; Private enterprise  
 30/9/03; Questionnaire ; Tamali; Private enterprise  
 30/9/03; Questionnaire ; Tannerie de L'Etoile; Private  
 enterprise  
 30/9/03; Questionnaire ; Tannerie du Nord; Private  
 enterprise  
 30/9/03; Questionnaire ; Tanneries tunisiennes; Private  
 enterprise  
 30/9/03; Questionnaire ; Tesoro; Private enterprise  
 30/9/03; Questionnaire ; Tunisie Froms; Private  
 enterprise  
 30-9-030; Questionnaire ; Association Tunisienne des  
 Techniciens des Industries du cuir ATTIC; Association  
 20/12/01; Interim report; Proj; ITC  
 10/11/02; Interim report; Proj; ITC  
 28/11/93; Memorandum; Proj; AFLAI FACIC  
 4/4/01; Memorandum; Proj; ITC  
 13/7/01; Memorandum; Proj; ITC  
 1/1/04; Memorandum; Addis Ababa 04; SIC  
 1/1/04; Memorandum; Addis Ababa 04; ITC  
 30/7/01; PerQuestionnaireance report; Proj; ITC  
 23-12002; PerQuestionnaireance report; Proj; ITC  
 17/1/01 Project document; Proj; ITC  
 13/3/02; Project document; ; ITC  
 13/11/02; Project document; Proj; ITC  
 13/11/02; Project document; Proj; ITC  
 16/11/98; Report; cape Town 98; ITC  
 30/10/00; Report; Casabalnca 2000; ITC  
 12/10/02; Report; Tunis 02; ITC  
 10/11/02; Report; Tunis 02; ESALIA  
 13/11/02; Report; Tunis 02; CNCC  
 30/9/03; Report; Tunis 02; Chad  
 12-203; Report; Mission; SMCP  
 12/10/02; Review; Markets; AFLAI FACIC  
 19/5/93; Statute; Mutuelle des Professionnels du Cuir et  
 Peaux; OMBEVI  
 30/11/98; Statute; Cape Town 98; AFLAI FACIC

## 5. RELEVANCE

### **The fundamental question is: “is AFLAI MIA a good answer to the African leather problems?”**

The program implementation was planned according to the original CLIA framework, a coordinated leather industry assistance concept, meant to improve the production performances and export trade penetration of the leather business in Africa, by increasing efficiency of related technical cooperation projects; to avoid duplication of work and consequent waste of donor funds; to increase the knowledge at donor organization levels of what is going on in the leather trade industry in Africa and to advise donors on the selection of their leather projects in Africa; to assist donor organisations in finding experts and consultants; to involve increasingly national import promotion offices and other associated institutions in developed countries in the marketing of African leather products.

The formulation is very determined and it predicts a strong leading project idea, and a lot of teamwork activities coordinated between the key players of the expansion of the leather sector in Africa and the intermediate agencies. The project draws the design to upgrade the competitiveness of the African leather segments in the global leather cluster by means of an improved exploitation of the raw material resources.

For instance it is commonly recognised that Africa benefits of some good and important primary resources, like raw hides and skins, and for this reason it has been assumed that several African regions have chances to play an important role in the development of the world leather business. The project idea follows a **bottom up agenda**. Understanding that the development of the leather sector in Africa is part of the movement to integration with the global market, ITC identifies several needs in order to upgrade African skills and technology, to transfer modern Know how from developed countries, and consequently, to design appropriate plans for adding value and quality to the African leather and leather products.

If the current phase of globalisation, from the mid 1980's to the present time, has been characterised by far reaching changes in the global trading system, like the higher level of skill and technology intensity of the products exported, some broad regional patterns are emerging with respect to developing countries.

For instance East Asia and some selected East Europe countries dominate the top end of developing country rankings in all leather and leather products fields, while Africa, despite the increased availability of raw material, ranks relatively low, much behind the top developing country exporters. During last decades, with the exception of Tunisia and Morocco, the percentage weight of the African leather sector has diminished, many large scale manufacturing industries have been closed, investments were stagnating and the African consumers' markets have saw fast growing import penetration of low cost products from China, or second hand goods from charitable organisations of the developed countries.

In this context, the schedule toward industrial rehabilitation, new acquisitions of technical services and infrastructures, as the projects' **bottom up agenda** confirmed, could not achieve crucial results to determine a better competitive position of the African leather sector in the world context. The market growth dramatically during last ten years, improving design and know how, as response to the elevated segmentation of the consumer market, as well as expanding the production capacity through delocalisation and enhanced machines and technologies, showing a new framework that sees the African sector still subsidiary.

As a group, Asian and East Europe country exports have grown faster than the world average and have grown faster than the improvement achieved by the African sector, that is still missing appropriate skills, finance resources, infrastructures and technologies.

MIA represents a very innovative program because the general criterion adopted to define weakness and opportunities, priorities, goals and instruments is essentially embodied to change the African leather sector from the **“product oriented”** system to become explicitly **“market oriented”**.

Further studies are necessary to find opportunities to rehabilitate the integration of the African leather sector with the world market. More broadly, the analysis developed up to now reveals a gap in debates around Africa’s industrialisation, which have been dominated by the implicit idea that Africa’s industrial development should proceed in a linear manner from its resource base, through successively increasing levels of value addition.

Going into details, the product-oriented programs envisage that the supplies side provides an indication of the productivity potential of particular groups of products, based on the skill and technology intensity embodied in the final product. In the market-oriented program, the general criterion of the intervention foresees the vertical integration based on market specialisation networks, and it offers more immediate opportunities and challenges for developing countries. The major opportunity is that it is no longer necessary for developing country firms to master the entire scope of production of a particular product.

It can specialise areas of production where it offers a competitive mix of costs and capabilities. Challenges include competition from other countries in the same capabilities, and longer term development of the domestic technological base, sometimes away from reliance on foreign technologies.

Such opportunities may be better identified and promoted through networking of enterprises, business meetings, product exhibitions and buyers and sellers encounters, as designed with the MIA program. What at this juncture it is still not understandable, is how much ITC and their partners are conscious of the market engagement promoted by the program, and, on the other line of attack, how much the predicted activities within the program framework are still closed to the traditional product oriented technical assistance concept. The mix of activities, showed in these pages, point out a vague approach, between product-oriented and market-oriented.

For instance, market-oriented are the guideline of the central objective of MIA, that envisages the improvement of trades through the implementation of an international trade fair in Africa, correlated to the objective of enforcing the African association networks, but it is product-oriented the envisaged task to enhance coordination between technical assistance activities among various development organizations and donors.

Coordination between donors and T.A. agencies was envisaged in order to avoid overlapping or duplication of technical assistance activities, not understanding that the key players of the African development may not be the intermediate agencies, but the entrepreneurs, social capital of the industrial sectors, and that the predicted coordination between technical assistances may be successful only if it is motivated by market orientations and market actors. Integration of technical assistance channelled only through intermediate agencies, looks like a less dynamic interface to the markets.

## 6. CONCEPT AND DESIGN

### 6.1 PROJECT OUTLINE

#### 6.1.1 PROJECT IDEA

When MIA was designed, the expectations from African leather industry were great, as confirmed by FAO statistical information about raw availability of raw material. The upward development was expected to continue. ITC studied the potential exploitation of raw material to justify market improvement assistance (Africa share of the total world production: 5% of bovine hides and skins, 14% of goat and kid skins, 9% of sheep and lamb skins, Africa share of the world trade: less than 2% in raw hides and skins, 2% for leather and leather products; less than 1% for leather footwear and footwear with leather uppers).

#### 6.1.2 BACKGROUND

In December 1996 leather industry representatives from 18 African countries and two regional leather trade associations, LLPI of the COMESA countries and ESALIA, signed a resolution requesting ITC to organize a sustainable leather sector African event. ITC responded by taking steps to organize a biennial “Meet in Africa” event, which started in Cape Town in 1998 and which was conceived as the central element of the integrated export development program for the leather industry in Africa (1996-2005).

The latter integrated program was aimed at promoting sustainable services within trade support organizations directly supporting the development of the sector.

The ITC leather unit started a coordinated industry assistance project in 1995, INT/47/57 – Coordinated Leather Industry Assistance (CLIA), Phase I, Africa. Its main focus was to aid donors to optimise the use of their investments, and it was outlined in order to avoid duplications caused by uncoordinated assistance from many sources.

The project was followed by two other projects: the first was RAF/47/65 - the all Africa Leather convention and trade fair (“Meet in Africa”). The other was RAF/47/66 leather products export development support to selected enterprises in developing countries in Africa.

The all Africa Leather convention and trade fair “Meet in Africa” (Project RAF747/65) was launched as a result to the findings generated by CLIA.

#### 6.1.3 STRATEGY

The program had been designed with the aim to create the capacity and adequate conditions for the leather business community, national and regional institutions, as well as associations and other intermediate agencies to facilitate the trans African and international trade opportunities on a permanent and sustainable basis.

The MIA project has been planned for an eight years cycle of biennial trade fair events as start up, and with the perspective for MIA to become a constant event managed by the private sector, supervised by a trans-national network of African entrepreneurs (AFLAI). The means to achieve the objective has been very difficult, and AFLAI recently could not take over the responsibility to organise MIA

#### 6.1.4 CHANGES FROM ORIGINAL DESIGN

The objectives and related outputs outlined in 1996 and 1998, preliminary to the first MIA event in Cape Town, after MIA 2000 in Morocco, were integrated with new project plans, covering the period between 2001 and 2005.

The main objective is to set up an integrated export development program for Africa with sustainable economic growth and social development.

A set of four objectives had been identified and relevant outputs were implemented, at regional level, national level, enterprise level, and cooperation level.

#### **6.1.4.1 AT REGIONAL LEVEL**

##### ***Objective 1: to boost intra-African trade and Africa exports to international markets***

##### **Envisaged performance indicators:**

- a) Throughout the program (1996-2005) at least 300-440 African enterprises, mainly SMEs and participant to MIA event, should directly benefit by increasing their production and marketing skills (at least 20-40 new trade contacts for each)
- b) New annual trade transactions at regional and international levels
- c) 3000 to 4000 buyers of African products will have gained a wide knowledge of the offer in the leather sector

#### **6.1.4.2 NATIONAL LEVEL**

##### ***Objective 2: To build and strengthen the capacity of institutions, particularly leather trade associations and training centres***

Performance indicator: 80% to 90% of African National and regional associations, training centres and other institutions would have a clear insight into the present status, common problems, possibility of trade cooperation.

#### **6.1.4.3 ENTERPRISE LEVEL**

##### ***Objective 3: To enhance the competitiveness of leather sector enterprises (particularly SMEs)***

Performance indicator: over the duration of a seven-years period, ten enterprises per year would increase their exports by 5-10% annually.

##### ***Objective 4: To establish a regional networking mechanism***

Performance indicator: at the end of the long-term Integrated Program at least 50 to 70% of African enterprises would use successfully the networking information system.

#### **6.1.4.4 INTERNATIONAL COOPERATION:**

##### ***Objective 5.***

To enhance the coordination of development efforts among various donors organizations.

Performance indicator : no more overlapping or duplication of technical assistance activities occurring by the international organizations active in the leather sector in Africa.

## **6.2 PROJECT COORDINATION AND FINANCING**

### **6.2.1 COMPLAINT ABOUT CONSOLIDATION**

The MIA program is covering a number of complementary self-contained clusters of activities: preparation and implementation of the MIAs as a way to boost intra-African trade and African exports to international markets; strengthening the Internet site for African hides, skins and leather products; building and strengthening the capacity of sectoral institutions at national, sub-regional and regional

level as well as promoting their networking; creating awareness on trade potential among SMEs and developing enterprise competitiveness.

For this reason the MIA events have been harmonized with the trans African leather cluster association AFLAI. The feeling toward the project of networking the leather cluster is always very positive, and all African entrepreneurs focused very much their comment on AFLAI performance, when they have been enquired about the MIA fairs. MIA 2002 assigned an important role to AFLAI, and strengthened the cooperation with other international and local partners, organisms, intermediate agencies, and private associations.

More cooperation and partnership means strong impact, further promotion plans, more opportunities of company matching and better quality of the follow up opportunities because of the increased availability technical assistance facilities.

AFLAI operated very well through the organisation problems to set up MIA 2002, because that MIA event was well sustained by the other Tunisian intermediate agencies. AFLAI took advantage, in this situation, of its office location in Tunis.

Several initiatives of technical assistance related to the development objective 2 (To build and strengthen the capacity of institutions, particularly leather trade associations and training centres) of the ITC planning outlined on 2001, re-orienting the original project document, have been implemented and others are in progress. Most relevant are:

- ❑ Activity 2.1 (2001-2002): Consultancy services in cooperation with AFLAI for the preparation of a sustainable development program, by means of an expertise assigned to ASSOMAC and developed with the contribution of ICE
- ❑ Also several meetings of the steering committee of AFLAI have been realised thanks to the assistance of ASSOMAC, within the framework of the International cooperation (objective 5).
- ❑ Existing regional cluster organisations had to be upgraded beforehand to a level where they could contribute to the trans-African network as an equal partner. Defining some minimum requirements for membership of a trans-African cluster would have helped to render co-operation mutually beneficial and stimulate enterprise participation. ITC gave T.A. to some regional associations and to AFLAI to promote the creation of regional and National associations. Under the framework of objective 2, Activity 2.3 (2001-2005) AFLAI, with some ITC assistance, has undertaken a study on the current situation and needs of creation of some National and regional associations. ITC maintained continuous cooperation with AFLAI, supplying secretarial and logistical support and funding for the AFLAI steering committee meetings. Consequence of this encouragement, some local key actors, at regional and National levels, are taking place programs to set up new associations: a local association of Senegal entrepreneurs has been created, as well as a similar tentative association is underway in Mali; talks about regional networks have been settled between the countries of Maghreb and between CFA West African countries. Also in South Africa the local associations are envisaging to develop a leather cluster network together with some bordering countries.

## **6.2.2**

### **6.2.3 CONSOLIDATING THE ORGANISATION OF MIA**

Already in 1998 there was a great interest for the Meet in Africa event from those met by the mission. African participants expressed the importance of a stronger attendance at the trade fair by buyers and investors from outside Africa. It was essential that more arrangements were made to attract more of them to the second MIA in Casablanca 2000.

There was a real necessity to continue Meet in Africa with all its activities; the advertising campaign for Casablanca 2000 was focused on attracting more visitors, investors and buyers from outside Africa.

There was a need for the preparation of a National profile by each African country, and ITC envisaged to conduct a study to define the common obstacles that confront trans-African trade and proposed measures to deal with it.

Export trades had been improved by means of projects for selected enterprises in African countries with the following outputs:

- ❑ Increasing the time given to each enterprise during the experts' visits
- ❑ Developing studies on particular import markets
- ❑ Contracts for training programs with detailed objectives
- ❑ A points system with chosen parameters and criteria to be prepared for the selection of enterprises to be included in the projects
- ❑ Measures had to be taken to ensure proper dissemination of the skills accumulated by the selected enterprises to the rest of the sector.

Some weak points had been underlined also during the second event designed within the project implementation (MIA at Casablanca, Morocco, 2000):

- ❑ The attendance from Europe and South-East Asia was poor;
- ❑ The promotion campaign was too concentrated on African countries;
- ❑ The duration of the event was too long (8 days);
- ❑ The buyer/seller meetings did not achieve sufficient immediate results.

Since then, the project plan was improved envisaging a strategic long-term policy of strong commitment of ITC in the organisation of MIA, since AFLAI did not show to be ready to start manage MIA as planned. Within this framework, it was ITC that carried out the visit to the Expo Centre in February 2001, analysed the offer made by the Expo Centre and prepared the Terms of Reference for the negotiation.

Before MIA 2002 in Tunis, in order to improve the logistic, between August and September of the same year, ITC prepared directly the Terms of Reference for the tender for sub-contracting the services of local organizers.

Substantial progresses were made regarding the Programs of the presentations/lecturers to be presented as contributions from UNIDO/PISIE sponsored and financed by ICE and ASSOMAC.

A new cooperation agreement was elaborated and signed between SIC and ITC for MIA 2002, with again extra-budget contribution (USD 150.000) from SIC to cover the international promotional campaign and the technical stand building at the fair, in order to increase the promotion through the EU and worldwide.

To complete the organisational strength of the MIA, not being AFLAI able to play a key role, the number of donors had been increased; a consulting with a number of official supporters and donors of MIA 1998 and MIA 2000 foresaw the possibilities of renewing cooperation.

With the purpose to get the fidelity of the participants, the existing mailing list and the setting up of an improved data base and registration system of participants was updated at ITC.

Summarising, a MIA 2002 project document was prepared and a first provisional budget for MIA 2002 was made, in which it was envisaged for ITC to maintain permanent cooperation, coordination and consultation with AFLAI and supply, whenever possible, technical assistance / monitoring to the Federation.

According to the progress made and the key facts, in view of MIA 2004 in Addis Ababa, Ethiopia, ITC is acting again in order that the project is enabling the establishment of networking, coordination and consultation mechanisms, within African associations at sub-regional and National level.

Next MIA 2004 would be organized in cooperation with SIC SA and AFLAI. Location and program of activities have been decided by African entrepreneurs during AFLAI general Assembly held in Tunis in the context of MIA 2002, and precise dates have been decided during the AFLAI Committee meeting at Lineapelle – Bologna, May 2003: according with those decisions MIA 2004 event will take place in Addis Ababa – Ethiopia, between 6-9 October 2004 and it will be focused on direct business development. The program will include: 6 October, AFLAI General Assembly; 7-8-9 October Trade Fair including buyers-sellers and Partnership meetings.

## **6.2.4 MONITORING NEXT ADDIS ABABA GOAL**

The set up of next MIA 2004 of Addis Ababa has been outlined according to the scheme that still envisages the separation of responsibilities between external agencies on one side, controlled directly by ITC and the local partner co-organisers of the event on the other side, also controlled directly by ITC, AFLAI still playing a marginal role.

### **6.2.4.1 PROMOTION THROUGH THE EU AND AFRICA**

A partnership agreement has been signed between ITC and SIC SA of Paris, main ITC partners for the organisation of MIA. The major cooperation activities includes:

1. communication and promotion
2. prospecting of participants (exhibitors and visitors)
3. registration of participants (exhibitors and visitors)
4. Logistics of the trade (stands allocation, customers services etc.)

Cooperation with AFLAI and the AFLAI Executive Committee Members is in place for mobilizing and coordinating African response and participation from all African sub-regions.

### **6.2.4.2 LOCAL CO-ORGANISERS**

The terms of reference concerning the venue for the trade fair, buyers/sellers meetings and AFLAI General Assembly have been prepared and preliminary discussions with local counterparts have taken place. The UNECA building has been opted as the venue for the whole event. Support at all governmental levels to the event, it has been promised by the Minister of Trade and Industry. A new association representing the leather sector has been created: ELIA (or E.T.F.S.G.M.A. - Ethiopian Tanners, Footwear and Leather Garments Manufacturing Association). It's important to note that Ethiopia is country member of ESALIA, a fact that assures better coordination of participating members countries at MIA 2004.

The NCC (National Coordinating Committee), created also in August 2003, groups together the leather sector professionals and all institutions and ministries involved in the organisation of MIA.

### **6.2.4.3 INTERNATIONAL PARTNES**

#### ***UNECA:***

Mechanisms of cooperation, coordination and consultation were established with UNECA for what refers to the preparation of the terms of reference for renting the venue and securing logistic and conference service from local providers.

#### ***UNDP / UNIDO:***

The two organisations have manifested their utmost interest in cooperating for the successful result of MIA 2004.

### ***CDE – PRO-INVEST:***

With the objective of strengthening the institutional capacity of AFLAI and of the Africa sub-regional and National associations, ITC has proposed that CDE-PROINVEST program be in charge of the organisation of a capacity building workshop in the context of MIA 2004. The project is currently under consideration in Brussels.

### ***The Partnership with SIC***

Since from the very beginning of the event ITC had to deal with the problem of selecting a new host country for every MIA event of the targeted cycle, and they had to properly take action to improve the organisation of the program, according to the feedback resulting after each MIA trade fair and connected events. Some weak points have been identified, related to the quantity and quality of visitors, buyers and sellers, and some important improvements had to be envisaged to strengthen the cooperation between partners and allied in view of next MIA 2004 in Addis Ababa. Strengthening the cooperation with SIC and MIA itself have also improved the promotion tasks. ASSOMAC accepted to continue sponsoring the biennial meetings of the AFLAI Executive Committee Members in Bologna, in order to maintain a high level of cohesion and communication within AFLAI.

## **6.3 BUDGET**

CBI/ITC assistance provided the project INT/47/57 – Coordinated Leather Industry Assistance (CLIA) for Africa 417 million USD, as resumed the project was followed by two other projects: the first was RAF C/47/65 - the all Africa Leather convention and trade fair (“Meet in Africa”) with a budget of 1 million USD and the other was RAF/47/66 leather products export development support to selected enterprises in developing countries in Africa, with a grant of 400 thousand USD.

For the Integrated Program, three components together and/or their multiples, another 450 thousand USD were added in 2001, plus 250 thousand in 2002, and 500 thousand between 2003/2004.

The third Meet in Africa (MIA), Tunis, 6-12 October 2002, capitalized on the experience gained in the previous events (Cape Town, 1998, and Casablanca, 2000), as well as on the increasingly high reputation of MIA among the business sector.

African participation was being largely subsidized by the international cooperation: free stands at the fair and daily allowances to all African participants.

AFLAI is the main output of Objective 2: “To build and strengthen the capacity of institutions, particularly leather trade associations and training centres” and it will be verified after the conclusion of the cycle (2005) by performance indicators that envisage that 80% to 90% of African National and regional associations, training centres and other institutions would have a clear insight into the present status, common problems, possibility of trade cooperation.

However AFLAI manages a small budget compared to the envisaged needs of communication throughout the whole African territory. The current total cost of AFLAI office in one year is on the tune of 53.300 USD, and it has been supported with 30.000 USD in kind (the annual meetings) offered by ASSOMAC. The remaining 23.300 should have been covered by means of a small contribution for communication offered by ITC (USD 1.000), and the annual association fees from the members, but the Tunis office is still not receiving the contribution fees by most associated (300 USD per year), so that the contribution received have been reduced year after year (2.667 USD in 2000, 3.173 USD in 2001, 2.068 USD in 2002, and only 573 USD in 2003). The settlement of the total expenses had to be covered by means of other contributions received from ITC and the balance of 7.400 USD has been granted from some associated in Tunisia.

**Box 2 Table: MEET IN AFRICA expenditures 1**

	1998 (Cape Town)	2000 (Casablanca)
<b>Attendance</b>		
<b>Exhibiting companies</b>		
African	186	256
Other	7	105
Registered visitors	971	1,746
Seminar participants	225	356
Buyer-seller meetings	1,450 (in two days)	750 (in one day)
<b>Income (US\$)</b>		
Registration fees - rental of stands	65,645	148,378
<b>Interest</b>		13,583
<b>Total</b>	65,645	161,961

**Box 3 Table: MEET IN AFRICA expenditures 2**

<b>Expenditures breakdown</b> (budget estimates/allocations for MIA 2002) (‘000 US\$ )	
<b>(a) Trade fair</b>	Between 150,000 – 200,000
<b>(b) Conference, Seminars, Expert group meeting, Buyer-seller meetings and MIA services</b>	585,000
<b>(c) Subsistence allowances</b>	160,000
<b>(d) Promotion and logistics management</b>	180,000

- (a) Trade fair ground and stands. Expenditures depending on total surface required.
- (b) Research work and implementation of conference, seminars, expert group meeting and buyer-seller meetings. Conference halls, inclusive of multimedia facilities and simultaneous interpretation. General MIA services, facilities and reception, e.g. transport, customer services, etc.
- (c) US\$ 100/day per African participant. 8 days/person as maximum entitlement.
- (d) Including materials, mailing, publicity, direct promotion in international events, stand allocation and services supply.

In addition to the above expenditures, the following costing elements of ITC staff should be taken into account:

- Coordination and implementation (18 w/m)
- Monitoring, supervision and evaluation (4 w/m)
- Secretarial services and administrative support (20 w/m)
- Travel (US\$ 50,000)
- Other administration costs

The organization of MIA is the major component of the “Integrated leather export development program for Africa”, implemented by ITC and financed by the Government of the Netherlands,

through CBI, whose net resources in 2001-2002 are US\$ 654,000. The following Organizations contributed and participated in the realization of MIA 2002 and/or specific events:

**Box 4 Table: MEET IN AFRICA expenditures 3**

Organization	Activities	Budget (US\$)
Groupe - Semaine Internationale du Cuir (SIC)	Co-organizer of MIA since its creation in 1998, Cape Town, SIC is responsible for the overall event promotion and for the logistics management of the trade fair	150,000 (direct expenditures)
African Federation of Leather and Allied Industries (AFLAI) - Executive Committee members	To create awareness of MIA within the sector and mobilize response from African enterprises. To co-ordinate the attendance of enterprises and to participate in steering the event through the MIA National Coordinating Committee.	N/A
'Centre National du Cuir et de la Chaussures' (CNCC) and 'Federation Nationale du Cuir et de la Chaussures' (FNCC)	Organising the presentation of local industry and developing seminars aimed at facilitating exchange and sharing of training programs in Africa. Co-ordinating the participation of Tunisian enterprises and co-operating with ITC in organizing local activities.	N/A
Expert Meeting		
Common Fund for Commodities (CFC)	Field research. Analysis and development of specific themes for the Expert Group Meeting, presentation of resulting studies and participation in preparing the final blue print on "Supply Chain Management and Development of Raw Hides and Skins, Leather and Leather Products: An African Perspective".	60,000
Food and Agriculture Organization (FAO)	Printing 1500 copies of the blue print	2,500
National Association of Italian Footwear, Leather Goods and Tannery Machines – ASSOMAC	Field researchs on the current situation and needs of the leather sector in Africa. Analysis and development of specific themes for the Expert Group Meeting, presentation of the resulting studies and participation in preparing the final blue print. <sup>1</sup>	80,000
United Nations Industrial Development Organization (UNIDO)	Coordination of research work for the Expert Group Meeting. Field research. Analysis and development of specific themes. Presentation of resulting studies and coordination of final blue print preparation. Sponsoring participation of 30 selected African sector representatives.	197,000

<sup>1</sup> These activities are co-financed by ASSOMAC and the Italian Institute for Foreign Trade (ICE). In addition, ASSOMAC facilitates and hosts AFLAI Executive Committee meetings during the SIMAC and TANNING-TECH trade fairs in Italy and finances the participation of selected AFLAI members through funds made available by the Italian Ministry of Foreign Affairs.

## 7. IMPLEMENTATION AND OUTPUTS

The conclusions of this eight years time program have been positive in terms of participation of the private sector. The project concept predicted several activities to get better business to the African entrepreneurs, like buyers and sellers meetings during the trade fairs, and expert meetings, related to the technical assistance issues. AFLAI general assemblies discussions allowed the identification, time by time, of the appropriate locations for the (up to now) itinerant trade fair. After MIA 2002 of Tunis, a Survey study was assigned to AFLAI, in order to evaluate the Impact of MIA on the leather Sector in Africa, and to report about the state of the art of the program, highlighted by some information about the competitive position of the African leather sector in the world market. Organisational and communication limits of AFLAI did not permit to finalise the study. The study was based on questionnaires delivered throughout participants of MIA that didn't come back or were poorly completed, so that it is not possible to know now the opinion of the entrepreneurs with sure statistical relevance. Many reports expected from Nations and regions represented in the AFLAI assembly have not been delivered to the AFLAI central office. The evaluator continued the survey visiting several important African countries that expressed delegations attending MIA fairs and directly interviewed the entrepreneurs involved in the project.

The interviews demonstrate several success stories, including partnership developments, technical assistance and successful business; between them most relevant are those related to trans African trades. Twenty-four success stories have been recorded, two of them from the Cape Town 1998, nine experiences related to Casablanca 2000, and thirteen resumed by some participants of Tunis 2002. Business of different nature and technical assistance programs occupied entrepreneurs from Tunisia, Senegal, Mali, Morocco, Cameroon, Ethiopia, South Africa, Mauritania, Chad, Burundi, Algeria, Kenya, and Botswana between the African countries, and the EU, India and Brazil worldwide. Many business and technical assistance programs have been designed between African countries, with fifteen examples gathered from the interviews. About the trans-national follow up projects designed between African enterprises, a number of ten were pure trade business, and five were technical assistance programs with North African partner on one side, and Sub Saharan promoters on the other side. Interviews underline that trans African contacts were developed with MIA for the first time, since business between Africans of different countries are not common for this sector.

### 7.1 ACTIVITIES

The activities followed the modus operandi of MIA framework, that is divided between two main outputs:

- a) The biennial Meet in Africa trade fair, located every two years in a different country, and completed with other linked activities, like the buyers/sellers & partnership meetings, , expertise conferences on selected technical assistance themes.
- b) The trans African leather cluster association AFLAI, designed for networking the African sector and to be the focal point of the MIA events.

#### 7.1.1 (A) MIA TRADE FAIRS AND MEETINGS

Four events have been totally planned, including the start up of MIA in 1998, MIA 2000 in Casablanca, Tunis 2002, and the next one in Ethiopia, Addis Ababa 2004.

Previous MIA trade fairs were completed with conventions aimed at high-level policy makers in the industry, government and international intermediate agencies of the cooperation, and of the cluster networks. The conventions, like the Seminars of experts in Tunis, were designed to build and strengthen the competence of institutions, to establish regional and international networks, as valued

elements to tie the cooperation between all key actors of the leather sector, with ITC playing a unifying role in the context, within a framework of a general integrated draw-round of technical assistance interventions.

Executive Agency for the organisation of the project was ITC, in coordination with the Centre for the Promotion of imports from Developing Countries (CBI), main donor of the project Meet in Africa, and with the preferred partner SIC (Group Semaine le du cuir), utilised for the promotion outside Africa.

The first two events have been organised by ITC with SIC. With Tunis 2002 the cooperation improved, and the event was organised by ITC and SIC, in collaboration with the Centre National du Cuir et de la Chaussure [CNCC] and the Tunisian La Fédération Nationale du Cuir et de la Chaussure [FNCC] as co-organizers. The event was also supported by the Centre for the Promotion of Imports from Developing Countries [CBI]- Netherlands as the principal donor, but also by the Tunisian government, United Nations Industrial Development Organization [UNIDO], Common Fund for Commodities [CFC], Food and Agriculture Organization [FAO], Associazione nazionale costruttori Macchine dell'area pelle [ASSOMAC], African Federation of Leather and Allied Industries [AFLAI], Center for Development of Enterprises [CDE], Tunisian Le Centre de Promotion des Exportations [CEPEX] and other international organizations and associations.

#### **7.1.1.1 TUNIS**

The Meet in Africa 2002 Fair held in Tunis, Tunisia on 6 – 13 October 2002, was the third edition of the Meet in Africa Fairs, the other two having previously being held in Cape Town, South Africa and then in Casablanca, Morocco. The Tunis fair, deemed to be Africa's greatest leather assembly included conferences, seminars, buyer/seller and partnership meetings, factory visits and excursions and a 3-day trade fair and was thus an innovative combination of three types of events.

#### **7.1.1.2 CAPE TOWN**

The first MIA took place in Cape Town in 1998.

The Implementation of the First meeting in Cape Town 1998 followed a framework utilised also for the other events that followed the start up.

The Cape Town agenda was including:

- ❑ **Two days conference**, where it had been defined the framework of AFLAI (a. facilitate access to technology and market; b. organize trade fairs; c. advocate joint ventures; d. advocate and facilitate continuous learning and upgrading market skills; e. considering globalisation environment market mechanism; f. pollution control; g. dealing with elements that confront intra-African trade and export to the international market).
- ❑ **Three days seminars** (seminars covered a range of topics which were presented by a group of experts). Three days fair: activities undertaken to manage the process were mainly the following: contracting with subcontractors SIC and Global Conference Ltd; press conference, publicity stands, editorial coverage; continuous contact with participants; monitoring selection of seminar subjects and choosing specialized experts.
- ❑ **Two day buyers/sellers meetings**
- ❑ **One day factory visits.**

### **7.1.1.3 CASABLANCA 2000**

The second “Meet in Africa” was held in Casablanca from 25 September to 2 October 2000 and saw a growing participation of African and non-African enterprises.

### **7.1.1.4 ADDIS ABABA 2004.**

The major component of the project “Integrated leather export development program for Africa (2001-2005)” will continue with the organisation of the fourth Meet in Africa (MIA 2004) which is planned to take place in Addis Ababa, Ethiopia, in the last quarter of 2004. The confirmation of Addis Ababa has been completed. The Mia structure applied to date will continue in 2004 (trade fair, buyer-seller meetings, joint venture consultations and capacity buildings events). The duration will be reduced to five days in order to proportionally reduce some cost factors.

## **7.1.2 (B) AFLAI**

From the point of view of AFLAI outputs, the first cycle of implementation of the MIA program, between Cape Town and Addis Ababa (1998-2004), was designed to strengthen sub-regional and trans-African cluster network. The project plan was to start up and consolidate MIA before transferring the project to the private sector. The idea of a cluster agency of the African leather sector, representing the sub-regional intermediate agencies, was introduced during the first MIA in Cape Town 1998.

AFLAI was set up including a steering committee, with the aim to improve step by step the association’s capacity building and decision abilities. With MIA 2002 in Tunis the AFLAI assembly proposed to locate next MIA 2004 in Ethiopia, and the AFLAI steering committee followed the preliminary feasibility of the new event, assisted by ITC.

The project then continued to support networking, coordination and consultation mechanisms within African associations at sub-regional and National level to support AFLAI playing a central unifying role.

AFLAI counts seventeen associated members. Between them five represent some regional or National associations, two are delegates by local institutions that promote the leather business in their countries, and ten are private entrepreneurs individually associated. Most of them are key players in their countries, related to the leather sector, acting as State or parastatal managers, or involved in the intermediation.

The countries represented are Algeria, Benin, Botswana, Cameroon, Chad, Ethiopia, the COMESA East African countries that are included in the ESALIA regional association system, Kenya, Libya, Mali, Mauritania, South-Africa, and Tunisia.

Morocco, formally represented by the National federation FEDIC has no delegates or associated participating to AFLAI anymore. FEDIC of Morocco was the partner responsible for the organisation of the Casablanca trade fair. The members of FEDIC confirmed that there are still some friendly communications, but substantially they do not recognise the AFLAI assembly as a significant mean of discussion and confrontation at regional or trans African level.

AFLAI-FACIC, active since 1998, after MIA in Cape Town, is facing serious difficulties in terms of capacity building, decision making and, above all, representation. Many African stakeholders already involved with National associations, even those participating to the MIA events, admit that most of the African countries, among those where leather is an important issue, have still not given their representation to AFLAI. Communication has been identified also as a big problem, since translations in English or other languages are not available, but the lack of strategy and perspective reduce very much the appeal of such organism.

## **7.2 RESULTS**

### **7.2.1 RESUME OF THE MIAS EVENTS**

#### **7.2.1.1 MIA 2002 Tunis**

MIA Tunis was the third edition of the fair and it was attended by:

- ❑ 367 registered exhibitors from 38 countries
- ❑ 2201 professional visitors
- ❑ 260 companies at the buyer/seller meetings with about 480 bilateral consultations
- ❑ over 300 participants in the Seminars and Expert Group Meeting.

The participating companies exhibited in Tunis their various products. The major products exhibited by the companies included:

- Pickled sheep skin
- Wet Blue sheep/goat skins and hides
- Crust
- Pickled sheep lining
- Dyed crust sheep skin
- Crust goat lining
- Vegetable tanned leather
- Leather goods; bags and wallets
- Shoe uppers
- Finished shoes

The participants to the 'MEET IN AFRICA 2002' took part to the General meeting of African Federation of Leather and Allied Industries [AFLAI], Expert Group Meetings, Buyer -seller and Joint venture Meetings, Factory visits and the Trade fair.

The leather-specific website "Leatherline" ([www.intracen.org/leatherline](http://www.intracen.org/leatherline)) has been completed. The website is an additional support element, it is already operational and its public release is planned for the coming days. The administrator is ITC for the moment.

#### **7.2.1.2 PREVIOUS MIAS**

Objectives for Cape Town 1998 and Casablanca 2000 were:

- ❑ To increase the image of Africa and to present the leather and leather products to the international markets
- ❑ Foundation of the first pan-African leather federation
- ❑ To tackle the technical and commercial problems that delay the mechanism of development of the industry
- ❑ To initiate a strategy for future African development.

The event was open to all countries and sectors of the African leather trade and industry.

The most important aim was to improve commercial ties, export capabilities, to provide an opportunity for traders, importers etc. and it has succeeded to the following promotions:

- ❑ The creation of an all Africa leather industry federation (AFLAI)
- ❑ Improving the image of the African leather industry
- ❑ It was the first time that such a number of African representatives gathered in one event
- ❑ About 195 African and non-African companies exhibited in the trade fair
- ❑ Creation of business contacts and contracts
- ❑ Common and coordinated African training strategies and programs

The activities to achieve the main project objectives were:

- ❑ conference
- ❑ trade fair
- ❑ training
- ❑ buyers/sellers meetings
- ❑ seminars and workshops
- ❑ factory visits

### ***CAPE TOWN 1998***

193 exhibiting companies, around 1000 participants from 58 countries, attendance to the seminars, workshops, buyer/seller meetings and conference was significant.

Taking advantage of the MIA event, ITC conducted a study to define the common obstacles that confront intra-African trade.

As follow up, ITC envisaged to design a project to identify particular import markets besides information about needs conditions, style and specification accepted in those markets.

In order to attract more non-African participants, it had been recommended that promotional materials clearly offered each participant the possibility of fixing his own program from a multiple choice menu.

### ***SECOND EVENT. CASABLANCA 2000***

The second “Meet in Africa” was held in Casablanca from 25 September to 2 October 2000 and saw a growing participation of African and non-African enterprises.

The total 10.000 square m. was filled by a total of 356 companies from 38 different countries. Nearly 2000 visitors from all over the world were registered plus many visitors who entered without registration.

The National pavilions were represented as follows:

- Tunisia for raw material and finished products
- Eritrea for raw material and finished leather
- Italy for machinery
- Spain for raw material and components
- Portugal and Greece for accessories and components

#### **Participation**

Total 1.746 visitors. Breakdown of exhibitors: 123 Moroccan companies, 128 African companies, 1.054 international companies. Most of them where from Morocco, Tunisia, Eritrea, Ethiopia, South Africa, Egypt, Portugal, Spain, Italy, France.

The 10.000m<sup>2</sup> was filled by a total of 356 companies from 38 different countries.

Breakdown of exhibitors :

- 123 Moroccan companies
- 128 African companies
- 105 international companies.

#### **BUYER/SELLER meetings**

As in 1998 in Cape Town, the “Meet in Africa” programme included buyer/seller meetings but, In Casablanca, joint ventures meetings were also held at the same time. Both the buyer/seller and the joint

ventures meetings proved to well suit and complement the trade fair as both enrich the exhibiting/visiting participation and enhance chances of making the right and often unexpected deal.

### FASHION SHOW

An excellent fashion show, organized by FEDIC, the Moroccan Leather Federation, presented Moroccan leather products. The show took place five times.

### FACTORY VISITS

A lighter menu concluded eight days of hard work for the participants who had a choice of either a series of factory visits, including tanneries, around Casablanca or an excursion to Rabat.

**Box 5: Table: development indicators of MIA 1998-2000**

<b>Meet in Africa 1998 2000</b>		
Development indicators	1998	2000
	Cape Town	Casablanca
Exhibiting Companies:	186 African 7 International	256 African 105 International
Participants in seminars:	225	356
Number of buyer/seller meetings:	1,450 (in 2 days)	750 (in 1 day)
Registered trade and industry visitors:	971	1,746

## **7.2.2 AFLAI ASSEMBLY, SEMINARS, EXPERT GROUP MEETING, BUYERS-SELLERS MEETINGS, TRADE FAIR, FACTORY VISITS**

### **7.2.2.1 AFLAI ASSEMBLY**

AFLAI held its second general assembly on 6<sup>th</sup> and 7<sup>th</sup> October 2002, this having been the first activity of Meet in Africa 2002. The meeting brought together Regional and National associations of the leather sectors in Africa who are members of the continental leather association. The participants were able to deliberate on the various achievements, activities/ programs in progress and future projections of the continental association as well as those of some of regional and National associations. This meeting

also provided a forum of the representatives of the various leather sector companies to present their needs to the associations for consideration during future interventions:

- ❑ The assembly of MIA 2000 in Casablanca requested a study about the actual situation and needs for technical assistance and policy changes in the leather sector that has been completed. The combined ITC – ASSOMAC report on technical assistance needs and development strategies at National and regional level was presented during the General Assembly of AFLAI at MIA 2002
- ❑ Some tasks of the International cooperation (objective 5) have been utilised to support the AFLAI assembly. Many participants were involved in MIA assembly, and the assembly defined next location for MIA 2004 (Addis Ababa).

### **7.2.2.2 SEMINARS, AND EXPERT GROUP MEETING**

Seminars and expert group meetings in Tunis have been implemented and developed according to the scheme of International cooperation (objective 5).

The Expert Group Meetings were organized by United Nations Industrial Development Organization [UNIDO] in collaboration with Food and Agriculture Organization [FAO], International Trade Center [ITC], Associazione nazionale costruttori Macchine dell'area pelle [ASSOMAC], and the Common Fund for Commodities (CFC). The meeting brought together experts from the above organizations, Leather experts representing various African countries, and other participants from the various leather sector companies taking part in the Meet in Africa event.

The theme for the Expert Group meetings was 'Trade Development in the Leather Industry in Africa'. The following themes were discussed at length during the meetings: -

- Effects of Globalisation on the African Leather Industry
- Benchmarking the African leather Sector.
- Macroeconomic policies, Trade and Investment and Institutional Environment.
- Essential actions to meet quality requirements of hides, skins and semi-processed leather from Africa.
- Marketing requirements for importers of African hides and skins.
- Quality Control and Management on the African Leather sector.
- Impact of the main policies and Environment protection measures in Africa's leather sector
- Innovative models in the field of business
- Prospects for E-Enabling International Trade in the African leather Industry.
- Financing Strengthening of the Leather Supply Chain in Africa.
- Challenges of setting up Structure finance in Africa.

The meetings enabled participants to exchange views and issues regarding the above topics that meant to enable African leather sector to take advantage of its high potential. At the end of the meetings recommendations were drawn and again all the stakeholders had the opportunities to discuss the recommendations. The recommendations of this meeting has served as a guide in drawing up a blue print African leather sector document, to serve as a reference point for the various International organisations when coming up with future interventions for the African leather industry.

### **7.2.2.3 BUYERS-SELLERS MEETING**

These meetings brought together various buyers and sellers from Africa and the rest of the world. Match-making was done by the organizers where buyers were matched with sellers to discuss the possibility of establishing long-term trading links between the companies.

The meetings acted as a foundation for the creation of long-term inter-enterprise strategic alliances or long term commercial agreements between African and companies from the rest of the world.

Several meetings have been good in terms of follow up results, but entrepreneurs suggested to develop a preliminary matching profile to improve the targets of the meetings. Also the small participation of international buyers was still a weak point for the buyers-sellers meetings.

#### **7.2.2.4 TRADE FAIR**

The Trade fair of Tunis was organised according to the scheme of objective 1: “To boost intra African trade and African exports to international market through”. Two events have been planned, as per output 1.1 description: Tunis 20002. Addis Ababa 2004

The major objective of the fair was to improve, on a global basis, the image of Africa as a supplier of leather and leather products and, for the participating companies, both from within and from outside Africa, to establish business contacts. The aim was to promote intra-African leather trade as well as trade between Africa and the rest of the world with a view to strengthening and widening the international market share of African produced leather and leather products. The fair also aimed at introducing and widening the industrial and technical know how in the sector.

With Tunis in the 2002, the capability of attraction of MIA was improved and consolidated: more than 2200 visitors, 367 exhibitors from 38 countries, 480 bilateral consultation within the buyers/sellers section.

The visitors constantly increased, compared to the 1.000 of Cape Town and 2.000 of Casablanca

MIA 2002 was an important opportunity to improve trans-African business.

The participation of many African companies at the fair gave them an opportunity to show their products to the international markets, but much more to interact with other Africans in the business in the perspective of strengthening the business links between them.

There was also some interest from companies outside Africa in the products displayed but especially wet blue hides and sheepskins. Exhibitors felt the participation was giving them an opportunity to show their products both to the African and the international markets. However, overall, the demand for wet blue hides and skins during the fair from outside Africa was higher compared to the demand of finished goods.

In order for the companies to fully benefit from the international trade, ITC implemented several linked activities within objective 1.

Output 1.2 and 1.3 internet sites [www.intracen.org/leather](http://www.intracen.org/leather) [www.intracen.org/leatherline](http://www.intracen.org/leatherline)

Output 1.5 articles published in the global leather press, that partially failed to get the objective to set up an African leather magazine “Africa Leather” published in France due to lack of subscriptions.

The set up of the trade FAIR has been implemented thanks to the cooperation agreement between SIC and ITC for MIA 2002, with extra-budget contribution from SIC to cover the international promotional campaign and the technical stand building at the fair. Other cooperation arrangements have been developed with ITC partners, namely UNIDO and PISIE regarding the promotion of the event and the program of seminars. The promotion carried out by the partners involved throughout Europe has been efficient, and this may be a model for further expansion of the promotional activity, because promotion has still missed to be professionally extended through the rest of the world and it is still focused on Africa and Europe only. The capacity building of the African sector by coordinating and networking the promotional activities did not take advantage of the transfer of know-how from SIC and the other partners, since this specific target had not been precisely outlined with the designed cooperation agreements.

### 7.2.2.5 FACTORY VISITS

In Tunis, the participants were taken around various Tunisian Leather Industry companies to exchange and share experiences with them.

This activity designed according to output 1. 1 of the objective 1, was successfully developed thanks to the cooperation between AFLAI and the local sector associations.

According to Output 3.2 “Hide and skin recovery”, the activity 3.2, “Consultancy services possibly in cooperation with FAO to increase the recovery and commercialisation of hides and skins”, a special device called SSF (Static Flaying Frame) was presented during MIA. Some experts judged this innovative, simple and non-expensive system of flaying that may have a major impact on improving the quality of hides and skins produced at rural level.

## 7.2.3 BALANCE OF AFLAI SURVEY ON MIA AND INTERVIEWS THROUGH THE SECTOR

### 7.2.3.1 AFLAI SURVEY

#### About the « Rapport: Fédération Africaine du Cuir et Industries Connexes – Impact de MIA 2002 sur le secteur cuir africain »

The document contained a lot of useful information, but the development of the comments didn't satisfy the objectives of the study.

The commented data were substandard, since the questionnaires received back from the enterprises and analysed were less than 30% of total participants and the reports were often very poor.

The selected sample of questionnaires is also not representing in homogeneous way all the African regions.

Due to the poverty of the gathered data it has not been possible to develop any comment about the *Comparative evaluation of the “Impact of MIA by sub-regions” and also “...by sector components”*. The sub-regional reports supposed to be prepared by the 10 members of the Executives Committee have not been received, except for a short report from Chad.

The analysis country by country was not concluded: the filled questionnaires reported the opinions of less than 15% of the Northern African participants (70% of total participants to MIA Tunis). No questionnaires arrived from Eastern African Sub-regions<sup>2</sup>, (17% of the total participation from Africa) .

Despite they were based on an insufficient number of questionnaires, representing only 14,5% of African exhibitors (40 entrepreneurs on 276 total), the statistic methodology used by the independent Consultant, a bureau of economic studies (BICF) that elaborated the data on behalf of AFLAI, allows to underline some positive feedback of the trade fair. The general feeling expressed by entrepreneurs is that MIA is a good event but still external to the private sector, an affair of the cooperation institutions. Entrepreneurs were convinced of its success, but if the organisation of MIA will be transferred to the private sector in the near future, many entrepreneurs replied they'll not come.

The BICF consultant tried his best to complete the evaluation and reported that the participants, about 40% of them, confirmed that their business improved, and 30% agreed that the fair has positively affected the quality of the products. More than 50% were in favour of a rotating MIA, as it is now, in a different country every two years. Only 13% favoured the solution of MIA stabilised in one country.

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<sup>2</sup> Several questionnaires have been filled by the Ethiopian entrepreneurs and have been delivered to ITC, but after the conclusion of the AFLAI survey report.

60% believed that MIA should be taken over by AFLAI, but they were not sure about the financial sustainability. Entrepreneurs (93%) also preferred MIA to be continued as a cooperation affair.

### 7.2.3.2 SUMMARY OF INTERVIEWS

Entrepreneurs believe that there are good opportunities to expand African trades in the leather sector by means of ITC assistance and MIA trade fair. Educational programs are welcomed, because delocalisation from developed countries to developing areas requires quality improvement, new know how and abilities to preserve raw material within a low impact environmental policy. Those know how have to be transferred from the North of the world, because in Africa modern technologies have not been developed. Entrepreneurs are positive and believe that Africa stands a chance of increasing the share of trade in leather products in the global markets. The strengths that Africa possesses, if properly utilized, could give a competitive advantage.

Entrepreneurs suggest that the vast population in Africa offer a comparative advantage as far as affordable labour is concerned. Previously, initiatives are undertaken by various donors and programs assisted enterprises to take advantage of the competitive edge enjoyed by African countries, endowed with livestock resources, or available labour resources and facilities, or local consumers' to satisfy, of closeness with the EU Mediterranean markets. However, Africa remains a small player in the global leather market, earning less than 2.5% of the leather trade global turnover, which is estimated at more than US \$ 40 billion annually.

Entrepreneurs feel that lack of competitiveness of leather products manufactured in Africa both for domestic and international markets has been the major problem in the sector, and the consequence is that many large and small- scale industries manufacturing leather products have already collapsed. Yet the impact of the program that we are appraising is not univocal, in the entrepreneurs' opinion, but it differentiates in relationship to complexities and differences that exist between different sub-regions of the continent and the degree of global integration. According to entrepreneurs, the common denominator that justifies MIA program is that Africa has a vast population. African population is affected by poverty, but potentially Africans represent a wide market still to be exploited. Trans African integration opportunities are thought very important and entrepreneurs are favourable to promote inter-regional trading at least by means of various regional trading blocs formed to enhance regional trades.

The existing trading blocs and trade associations offer preferential tariff and non-tariff treatment to member countries and encourage regional economic development. Different blocs are North Africa and Sub-Saharan Africa, and between Sub-Saharan Africa the East and the South more industrialised and the West and the Centre still raw hides and skins dealers, with the exception of Nigeria that is well advanced in the industrialisation process of the leather sector.

Many companies from Tunisia exhibited their goods and were present to MIA, both in Casablanca and Tunis. North African entrepreneurs finalised good business in particular with some other African countries. Unfortunately some trades could not be implemented, because of lack of trade infrastructures, sometimes due to trade (custom) barriers or insufficient transport facilities.

Local institutions that co-organised MIA 2000 of Casablanca in Morocco do not have a very positive opinion about the MIA program, because they registered very low impact of MIA on their trades and reported that many buyers attending the fair in Casablanca were leather traders only, or mostly, while they met few visitors interested in finished goods. However some entrepreneurs did good business in Casablanca with the components and accessories sectors. Entrepreneurs from all regions confirm positive opinions about trans African trades, mainly between North African and sub Saharan joint partners. Some Western Africa entrepreneurs dealt with intermediate goods sectors from Morocco and Tunisia. Maghreb products were sometimes competitive compared to the EU accessories and supplies. Lack of communication and bad transport infrastructures again limited the development of such trade business. Entrepreneurs from Maghreb have extensively utilised MIA services. Maghreb economic

integration processes are still at a very early stage, affected by political problems, but MIA represents an opportunity to overcome barriers, from the point of view of the specific sector of reference, of course. For instance, recently in Algeria the industrial sector was liberalised and several entrepreneurs exhibited to MIA with positive results. Algeria is a big importer from Asia. Officially China exported 1.8 million pairs of shoes to Algeria, but informal imports may be double. Regional integration in the area may lead to an important import substitution progress. Also The Egyptian sector represented by The Chamber of Leather & Fur, that organises a local and international trade fair [“Cairo International Leather Show”], approves MIA programs and Egyptian entrepreneurs are interested in dealing with MIA also in the future.

South African entrepreneurs are favourable to regional integration too, and they were promoting advanced technologies from South Africa to be distributed throughout Africa. South Africa is a large consumers’ market for footwear and leather products, but its industrial sector is facing tremendous crisis, and domestic market is importing finished goods from China. The footwear production was of 63 million pair of shoes in 1992 and now in 2003 has been of 20 millions only.

RSA entrepreneurs hope in regional markets and in AGOA opportunities. However at the present moment the situation is very unstable. A trade fair for Africa has been and it will be a good opportunity to implement the trans African Business, for export trades toward world markets the expectations are more confused.

Sub-Saharan entrepreneurs ask for more assistance to become able to compete both in quality and price in standard or niche/segmented markets. The industries need help to improve skills, productivity, technology and marketing capacity.

ESALIA and ETA (Eastern African and Ethiopian leather associations) professionals are only partially half positive considering the impact of MIA, and limited to the Meet in Africa Trade Fair section, where in many cases the entrepreneurs have obtained some good results both in sense of number of contacts, and real business. Entrepreneurs have great expectations and want this kind of events to be continued also because they give a good image of the African business.

Therefore, from that point of view it has added qualitative impacts to some extent. It has been difficult to some instances to quantify the actual benefits for individual enterprises. ESALIA, for example, has consistently been represented in the Trade Fair, by over 50 companies, and ETA as well, by 10 to 15 from Ethiopia, and this happened most of the time since the previous editions and therefore they now feel like they want to participate again in this event, also in the future.

Entrepreneurs and professionals are very much concerned about next MIA of Addis Ababa 2004. This year 2004, in the Region of Eastern of Africa, it will be organised for the first time the MIA event interesting Sub-Saharan Africa. This is really the first time it could be truly seen what is the possibility of having a successful event with purely African Sub-Saharan characteristics and it may be premature now to conclusively say that MIA has reached positive results for the sector, because one has to keep in mind that the Trade business during the last ten years in Africa has been undergoing through a lot of transformations, toward a dynamic and transitory situation. Besides strength and weakness, entrepreneurs feel also that the fact that there will be a good event in Ethiopia is really a positive aspect and that it is good to promote the African leather industry, substantially.

The entrepreneurs of Mali are very much in favour of MIA, because it is an opportunity in Africa to expand the business, where the industry is at a very primitive stage.

In Senegal the MIAs have been promoted by a National Body, the “Centre International du Commerce du Sénégal” (CICES), that is a State Commission Organism designed to facilitate the creation and the internationalisation of SMEs.

Main objective of the CICES is to link the Senegal leather sector to other international markets, to improve export, the quality of the local market, and attract FDI.

Since Casablanca the participation to MIA of several companies from Senegal (there were 7 companies from Senegal with their own stand, plus few others without stand hosted by the CICES booth) has been granted by CICES promotional campaign.

The lack of organisation and lack of budget did not permit a good set up of the place with a proper booth, good promotional brochures, and the performance of the “Senegal image” have been very poor, of low impact.

Also the products brought in were not so interesting because the most important companies that participated to Tunis were mainly export traders of raw hides and skins, while few samples of footwear were of very poor quality. Entrepreneurs are sure they have learned something and they also propose to implement in Senegal, as focal point for the West Africa, a trade fair of the MIA program in future.

### **7.2.3.3 SUCCESS STORIES**

Success stories as follow up of the MIA trade fairs may be many, but not always these examples have been reported within the feedback debriefing or the final reports. However several success stories have been verified by means of the interviews gathered through the sector within the evaluation report activity:

#### ***FOLLOW UP OF CAPE TOWN 1998***

- ❑ A Tunisian factory, as follow up of MIA '98 in Cape Town, developed a trading line for export shoes toward Senegal, and
- ❑ After the meetings linked to MIA, in Cape Town, a tannery of Senegal started a cooperation with the UNDP: with UNDP the tannery cooperates up to now within a program framework, designed to upgrade the quality of vegetable tanning, in partnership with the leather sector of Mali.

#### ***FOLLOW UP OF CASABLANCA MIA 2000***

- ❑ After Casablanca MIA 2000, a shoe factory implemented a joint venture business with Morocco to import vegetable tanned leather in Tunisia on regular bases
- ❑ After MIA of Casablanca the CNCC of Tunisia completed a new program in Cameroon for the upgrading of the raw hides and skins collection and preservation, wholly supported by the private sector.
- ❑ A leather garment producer from Ethiopia, during the Casablanca event in 2000, had the opportunity to meet several Morocco companies dealing with accessories and raw material supplies, then imported to Ethiopia.
- ❑ The same leather garment enterprise started to export leather garments to South Africa, due to the contacts in Casablanca.
- ❑ A leather garments manufacturer from Morocco, could contact some new clients in India and Pakistan, as follow up of the MIA 2000.
- ❑ A large tanning group from Morocco, producing finished leather: during the MIA 2000 they received the visit of Italian, French and German buyers, that they had never seen before. After the conclusion of the meeting and of the fair they could finalise business with 3 new foreign customers from Europe, representing an increase of 5-10% on their export trades on yearly basis.
- ❑ A Tannery and shoe upper manufacturing company of Morocco, during MIA 2000 in Casablanca, received in total 5 new clients that during the next year represented 30% of the total monthly turnover, equal to 1,5 million sq/ft (30% = 0,45 million sq/ft).
- ❑ A leather trader from Senegal, who had the opportunity to be part of the event in Casablanca 2000, verified positive results, since he could improve the sales through Europe at that time.
- ❑ A Brazilian chemical company that participated to the Casablanca event, could engage two agents, one in South Africa and one in Tunisia, for the regular export of chemicals for tanning purposes.

### ***FOLLOW UP OF TUNIS MIA 2002***

- ❑ A number of three different programs have been developed by CNCC as follow up of the MIA 2002 in Tunis:
  - a) Mauritania: rehabilitation of a tannery co-financed by ITC funds, through the cooperation with AFLAI.
  - b) Chad: training of technicians of the leather goods sector, under ITC umbrella in cooperation with AFLAI
  - c) Burundi: rehabilitation of a local tannery and market study, financed by UNIDO through AFLAI
  
- ❑ Mauritania: A Tunisian group of enterprises could really experiment, thanks to the MIA fair and the atmosphere of the MIA seminars, some follow up projects in partnership with some other African countries:
  - a) T.A. programme to upgrade the wet blue of a Mauritanian tannery, trading 30.000 pieces of wet blue leather for assistance and know how. The T.A. has been developed by means of the support received from a technician offered by the CNCC, and the programme implemented in 2003 will be continued in 2004
  - b) Trade agreement has been defined between a Tunisian footwear manufacturer and a Cameroon footwear company, to provide shoe uppers for the security booths, that have been assembled and finished in Cameroon with the support of the Tunisian know how
  
- ❑ A Tunisian manufacturing enterprise, after MIA-Tunis started a trade business with Sudan, supplying men shoes.
- ❑ A Kenya incorporated company established in 1988, involved in the manufacture of leather goods, like handbags, wallets, folders, briefcases, travel bags and handcrafted sisal bags, currently employs 15 people. Major customers are banks and hotels in Kenya, but after MIA in Tunis they have also started some export trades to Switzerland, Germany and the USA. After the MIA 2002 in Tunis, Nalina Ltd implemented a program to enter the Italian market.
- ❑ In Tunisia, MIA 2002, an Ethiopian leather garment manufacturer could develop several business as follows:
  - new customers in Botswana,
  - new customers in Kenya plus a new local agent,
  - sales agreements for to Tunisia, as trading point for some other international markets.
- ❑ A South African tannery successfully participated to Tunis, the follow up has been good and they could export finished leather to new customers met in Tunis MIA 2002.
- ❑ A large raw hides and skins dealer of Senegal took advantage of MIA to rehabilitate the activity, and with the technical assistance of agencies, like UNIDO, for the creation of SMEs cluster, the UNDP to improve the artisan sector, the FAO and the CFC to upgrade the raw and hide skins collection and selection, the company could start up again its export trade program worldwide.
- ❑ The MIA 2002 has been successful for the Algerian State Group managing the leather sector, that implemented a programme of rehabilitation and privatisation of the public sector involved in the leather business.

## **8. THE MARKET RESPONSE**

### **8.1 FEEDBACK**

The impact of the MIA program on the African market cannot be statistically valued on continental basis. Vastness of the territory, incompleteness of local statistic analyses and existing ephemeral relationship between intermediate organizations and the private sector are the most common obstacles to a proper evaluation. The MIA trade fairs located in Maghreb, Morocco and Tunisia, have benefited of the encouraging trend of the local leather sector, for worth of the preferential relationship of the Mediterranean area with the EU.

It has been reported (it is not possible to verify how much reliable are the data) that after MIA of Casablanca the participating companies received potential orders of approximately US\$ 2 million and confirmed orders worth US\$ 1 500 000, but further expansion of the business throughout Africa was not conformed between 2000 and 2003, rather a light decline in the Southern Africans markets. The economic progress of the leather sector within North African regions is genuine, but how much it is connected also with the MIA trading fairs, this is not possible to know.

From the interviews through the sector in Africa, the impression was that the impact on business had been positive for export trades between Africans, but the impact on business between Africa and the rest of the world was insufficient because of limited numbers of buyers visiting the fairs, coming from outside Africa. EU countries were well represented, among other international visitors, but entrepreneurs remark that there were few buyers, and most of the visitors, plus the exhibitors were sellers.

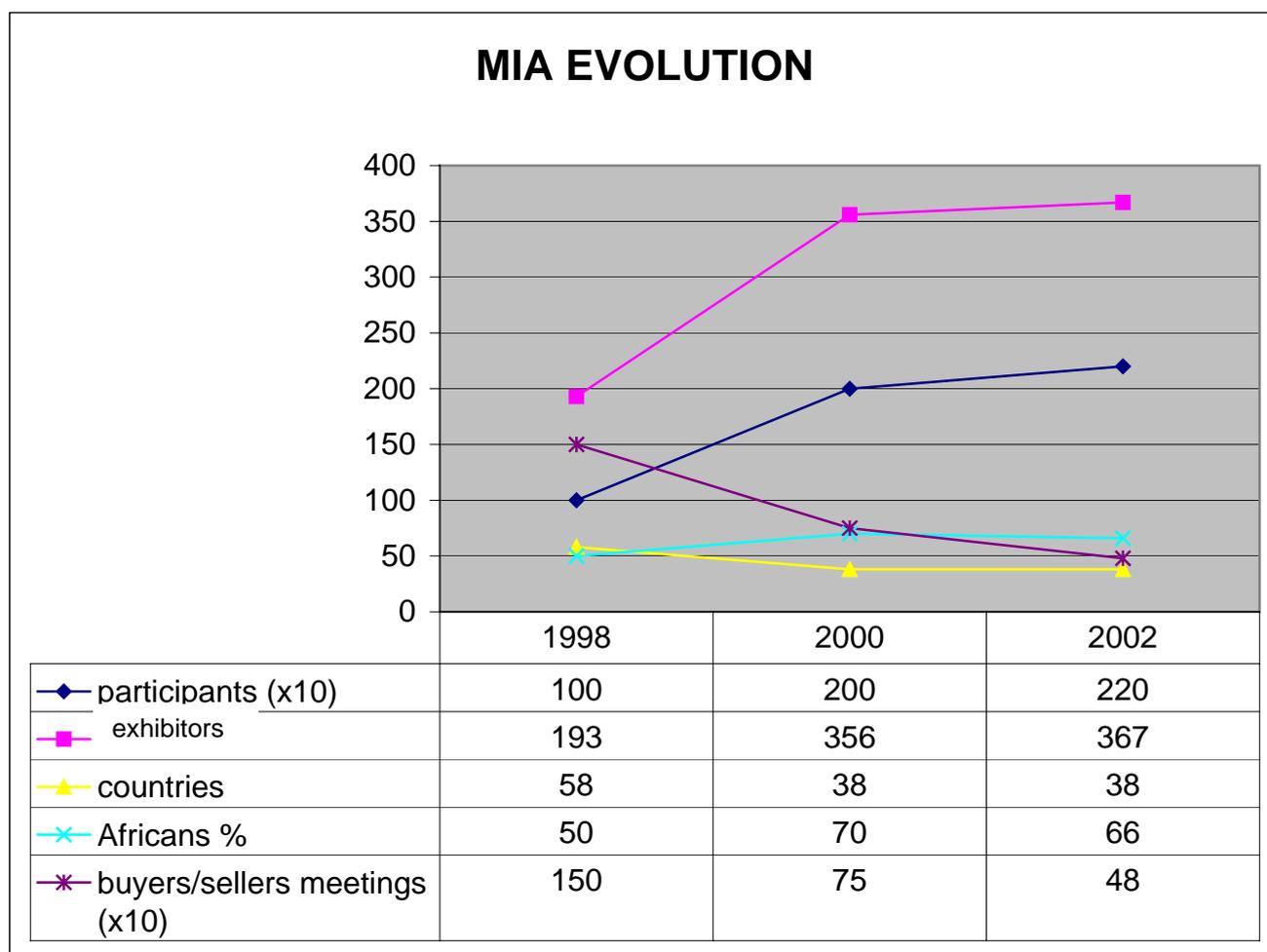
With Tunis 2002, the attraction of MIA appeared more solid ( more than 2200 visitors, 367 exhibitors from 38 countries, 480 bilateral consultation within the buyers/sellers section). The visitors were constantly increased, from 1.000 in Cape Town, 2.000 in Casablanca and more in Tunis. Nearly 60 countries were represented by the exhibitors' sector in Cape Town, and 38 in Casablanca and Tunis.

### **8.2 MARKETS**

Between two main events, implemented between 2000 and 2002 in Morocco and Tunisia, the African market exported an increased quantity of shoes resourced from North Africa for West European countries. Mainly Tunisia and Morocco, both expanded production and export of footwear to Italy, France, and Germany. But in South Africa the shoe industry, formally very important in this country, continued its decline, started since 1994. In the whole of Africa, since the year 2000 the consumers' market growth of 3,3%, with a 26% on production capacity, and a reduction of the import penetration of about 10%. The competitiveness of the African raw hides and skins market growth a little bit with the expansion of the footwear production in China, but the industrialisation based on the exploitation of the local raw material resources was still stagnating with few investments in the sector, despite some positive examples like Ethiopia or Sudan.

The African market background, (N- Africans entrepreneurs as preferred suppliers of the European sector and Sub Saharan Africans needing machines and technology for traded leather) was duplicated throughout the exhibitions, where it was possible to verify that the North African countries were more actives with their European customers, Sub Saharans more focused on leather export and machines imports.

**Box 6 Figure: Evolution of the participations to MIA between 1998 and 2002**



### 8.3 SATISFACTION AND OUTCOMES

The results of the fairs organized according to the scheme of Meet in Africa can't be analysed like outputs fully controlled by the organizers. Entrepreneurs do not inform very often about their outcomes during the fairs, and the evaluations depend to a large extent on the discussion of the opinions investigated through the participants after the show.

The principal aspects to appraise, are the rate of satisfaction reached by the participants, the number and the quality of the business that have been somehow made known, in terms of volume or percentage, as well as the classification of the exhibitors and the visitors. That allows us to understand what is the specific weight of the potential exports, or what is the specific weight of the importations for capital goods and intermediary goods, thought essential to improve technology and value added of the African products. It is also important to verify the position of MIA trade fairs among other international events of the same nature.

#### 8.3.1 EXHIBITORS' SATISFACTION

According to the AFLAI report on MIA 2002 of Tunis, the level of satisfaction was nearly 90% among those participants that replied (not many) to the questionnaire, however the satisfaction about the participation has been confirmed with further questionnaires received later and the majority between the entrepreneurs confirmed their full satisfaction. It must be remarked that there is a contradiction in the opinion itself, because the same participants that were very enthusiastic about the results obtained

from the trade fairs, showed small interest to continue the participation in future (93% of those that replied to the questionnaires), if the participation will not be supported by some benefits granted by ITC, like hotel free of charge or exhibition booth free.

The rate of satisfaction goes down when it comes to evaluate the utility of some events connected to MIA, like seminars, 16% fully satisfied only, or the visits to the enterprises, 9% fully satisfied, or the pre organised meetings between buyers and sellers, 24% fully satisfied, and perhaps this is a symptom of criticism for the organization of such events, but it may be also be explained as a hidden symptom of a growing interest toward the pure business, compared to the technical assistance activity.

The interviews to the African entrepreneurs explain the controversy between high satisfaction for the past events and low grade of interest when foreseeing the future participation in absence of contributes. Most of the interviewed report positive business outputs, with details about some success stories, but they also remark some lack of international visitors, and underline that the majority of European and other non African participants were mostly suppliers.

### **8.3.2 IMPORT AND EXPORT TRADES**

35% of exhibitors during MIA Tunis exported goods to other African countries. Exports within the African markets were on the tune of 37%. 12% of import agreements and 19% of exports were related to the footwear sector, 12% and 15% were connected to the footwear sector, respectively 4% and 19% were the import and export leather goods contracts, 12% and 8% other sub sectors.

### **8.3.3 CLASSIFICATION OF COMPONENTS**

More than 50% of exhibitors to MIA 2002 were producers (179 on total 360), between them 38% were exporters. In percentage we had: 52% producers, 38% exporters, 36% importers, 12% tanners, 9% traders, 12% retailers, 12% sales agents, and 7% participated with other lines of activity.

Total 40 countries have been represented, between exhibitors and participants, 30 countries from Africa, 8 countries from Europe, 1 from Asia, and 1 from the American continent.

Entrepreneurs from some important countries still missed to join the event, between them Nigeria, and China. Nigeria is the third African country for raw material resources and the local industrial sector, -- tanneries and finished goods-, is between the top units in Africa, while China is the first world exporter of footwear. Other entrepreneurs or traders came from the raw hides and skins sector, chemical sector, machines sector, other components, and no footwear or leather goods/garments were registered at this stage.

### **8.3.4 BENCHMARKING**

An important lesson learned interviewing the entrepreneurs in Africa, and confirmed by the benchmarking, is that the market and the manufacturing world is one thing and the Fair is another. Manufacturing world in Africa is still at the early stage of development, with the top section represented by contractors that produce shoe upper or assemble shoe and leather products for export, or tanned leather producers, but MIA has consistently retained its role as one among the world's foremost fair leader as regards leather, shoe and leather goods. The structure of the event is getting stronger and, if the exhibit layout will be better defined, the numbers will be confirmed and improved in terms of exhibitors and visitors.

On the visitors' front, there is every reason to believe that the number of attendances will be the same also during next Ethiopia event, since the number of accrediting requests is what it has been in the preceding years, and the usual number of foreign official and collective delegations are also expected. The weak point is that much participation will be defined again with the effort and financing contribution of ITC on behalf of the program' grant.

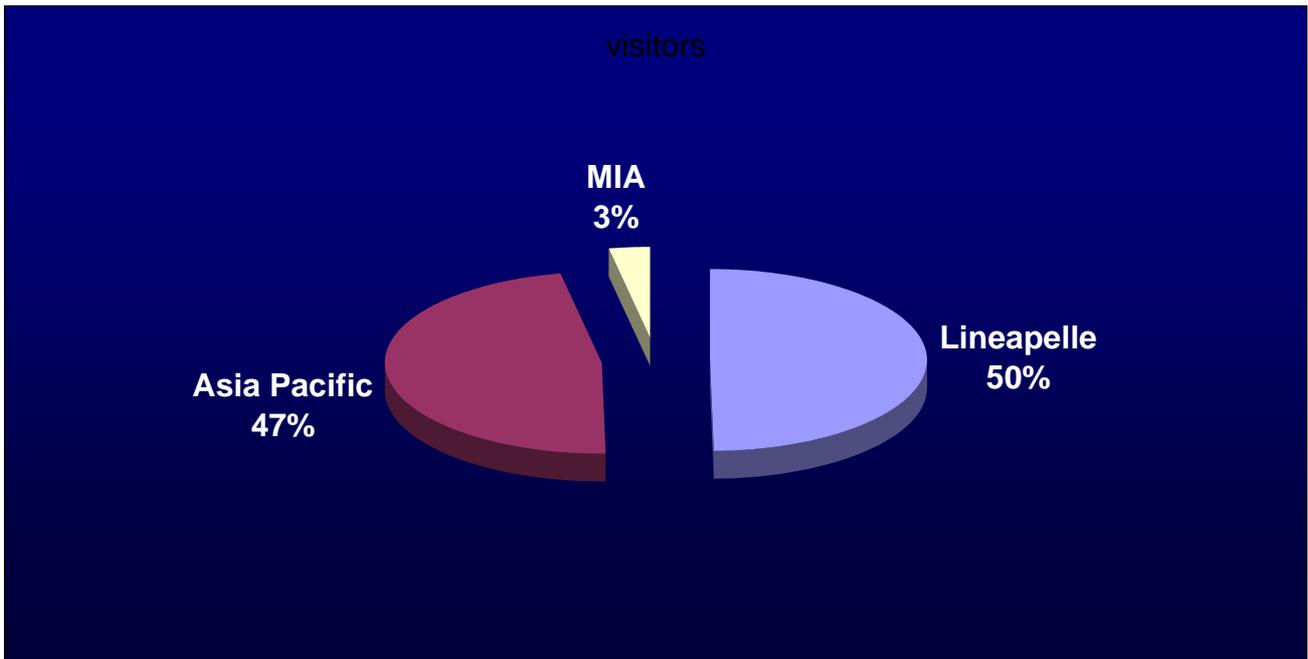
The links between MIA and some European leading world events and agencies or associations, like SIC for the organisation of MIA, and ASSOMAC for the promotion through the EU leading sub-sectors is thus, a favourable circumstance that attracts considerable interest toward the African fair. In addition, MIA confirms its role as the obligatory crossroads for all leather, shoe and leather goods manufacturers or accessories suppliers who want to implement trans African business proposals.

From this last depicted point of view, MIA is not just an opportunity for manufacturers and traders to meet, through an organised method, the clients who they know, but also becomes a new opportunity for trading and cooperating between Africans of different regions, and worldwide businessmen, as it has not been possible to do it before, if not through the intermediate communication and services of the European sector, for historical reasons. Until thirty years ago Europeans (and Americans) were unquestionably the major leather and footwear producers, but since then, developing countries in Asia and South America have gradually built up their own manufacturing capacity. This trend was given a significant boost from the 1970s onwards as Western companies transferred their leather product manufacture, principally shoemaking, to Asia to take advantage of appreciably lower manufacturing costs. By the 1990s, the Western leather sectoral industry had taken a severe pounding and considerable manufacturing capacity has been lost. It is a trend, which is likely to continue, and in the new context the African market may be not represented from now on only as a corner area in the European meetings.

The following exercise compares the performance of two most important world leather fairs and Meet in Africa on 2002. The first was the combined Lineapelle and SIMAC exhibition of Bologna, leathers, accessories, components, synthetic products and models, machines and technologies. The second was Asia Pacific Leather Fair of Hong Kong, also a set of two international exhibitions of fashion and finished products, raw Materials and manufacturing. Possibly the two combined events are still the most popular in the leather world business.

Together, the three events, Tunis, Bologna and Hong Kong, attracted over 70.000 visitors, and MIA allocated 3% of total guests. If we look at the world leather production and footwear production figures, Asia performed 54% with China on the top, and for footwear China alone performed 54%, compared to Africa always below 2% of world production. The trade fairs figures reproduce the world market situation with a better position for the European events, 50% of visitors, that is understandable because in Europe there are important fashion and technology leather districts, but also MIA performed better instead of simply reflecting the African production situation, with this 3% instead of the 1,5-1,9% actually performed by the manufacturing units. Thus MIA is a good base to start for enhancing market development in that part o the world.

**Box 7 Diagram: visitors between MIA and other leather fairs**



The numbers of the trade fairs were:

- **MIA**, as reported from Casablanca 2000 and Tunis 2002 are:
  - 367 registered exhibitors from 38 countries
  - 2201 professional visitors
  - 260 companies at the buyer/seller meetings with about 480 bilateral consultations
  - over 300 participants in the Seminars and Expert Group Meeting.
  - About 2 million USD as business turnover
  
- **Lineapelle, Bologna, and SIMAC Italy**:: Two international exhibitions of leathers, accessories, components, synthetic products and models for footwear, leather goods, leatherwear and furnishing, footwear and leather goods machines, technology and accessories
  - Exhibitors: 1.900
  - Country: 50
  - Visitors: 35.000
  - Exhibition sectors tanneries: accessories, synthetics, designers, press/schools/Africa, machines
  
- **Asia Pacific Leather Fair, Hong Kong**: Two international exhibitions of fashion and finished products, raw Materials and manufacturing.
  - 33.000 visitors
  - 90 countries involved
  - nearly 3.000 exhibitors from 38 countries
  - 80% of trade business to and from Mainland China

## 9. FINDINGS AND LESSON LEARNED

### 9.1 EVALUATION OF MIA

As part of the MIA process, a formal evaluation of the “Export Development of African Hides, Skins, Leather and Leather Products” was initiated by an independent evaluator (Mr. Yehia El Mokadem) between May and August 1999, after the event in Cape Town had been concluded. This evaluation was designed to assess the utility of the three combined projects, “Coordinated Leather Industry Assistance (CLIA)”, “All African Leather Convention and Trade Fair (Meet in Africa)” and “Leather Products Export Development Support to Selected Enterprises in Developing Countries in Africa”. It was recognised that many organisations, many African representatives and many African entrepreneurs and other professionals and managers participated in the first MIA event. In addition to this qualitative review of the MIA, a quantitative analysis was conducted about the coordination between the programs, all using financing resources mainly coming from Netherlands. More support could have been available from closer technical cooperation between ITC and other bodies of the cooperation system.

From this evaluation, it was concluded that the creation of AFLAI was a significant result in order to transfer MIA to the African network of cluster associations, but the management of the program, for the moment, remained committed to the conceptual framework of technical assistance as cooperation grant. Since then, Meet in Africa fairs shifted to the top position within the priority scales of the activities predicted with the integrated program.

However, AFLAI appeared to have limited utility given the existence of systemic issues and pre-established priorities for managing MIA. As a result, the previously envisaged mandatory use of AFLAI as the “Executive Agency” in charge of the organisation of MIA was discontinued after MIA 2002 in Tunis. In addition, further regional-wide refinement of the Network was also discontinued and the AFLAI was not effective as sole trans- African cluster network as originally intended. Few stakeholders and intermediate agencies continue to use AFLAI services, but every year less.

#### 9.1.1 WHAT HAS WORKED?

Results from the evaluation of reports and group meetings suggest that the development and implementation of MIA as unique project framework resulted in the following accomplishments:

##### 9.1.1.1 ENHANCED SUPPORT TO ENTREPRENEURS’ TRADING OUTPUTS

Through the trade fair, including buyers and sellers meetings, MIA has enhanced rehabilitation at marketing level of responsibility for quality upgrade of the merchandised products.

MIA side events, like expert meetings, also supported professional decision-making by providing a standard set of main concerns. In fact, professionals often used MIA follow up technical assistance suggestions as support to explain the manufacturers’ position in the competitive African/world context. New methods for raw hides and skin preservation experimented after MIA were positive examples, as well as bi-lateral technical assistance projects approved by some T.A. agencies (e.g. CDE) during MIA, by implementing plans that had been conceived not within a technical assistance pre-determined framework, but in consequence of the “we need upgrading” oriented atmosphere of the on going seminars.

### **9.1.1.2 INCREASED RELIABILITY OF INTER-AFRICAN TRADES**

Increased South-to-South sales were realized, foreseeing associations involvement with more lobbying, aimed to infrastructures improvement, through African Countries. A different approach between client and supplier has been introduced, and transactions are now made between two actors playing in the same context, instead of between somebody from a developed country, fully responsible of the integrated process, and somebody else, African, still undeveloped within certain limited constraints. Consequently some new marketing elements have been introduced within the African sales philosophy related to the importance of developing standard criteria to determine client needs.

### **9.1.1.3 INCREASED FOCUS ON CLIENT FUNCTION AND PREDICTED OUTCOME**

Entrepreneurs realized the importance of considering the impact of the presenting problem on function during the sales process. In addition, entrepreneurs recognized the importance of considering predicted client outcomes during the sales process. This happened simply because in MIA, located in Africa, it was the first time that sales were promoted starting from suppliers inventiveness. During the trade fairs in Europe, Africans are often marginalized.

### **9.1.1.4 USEFUL TOOL FOR MANAGING PRICE LISTS AND SALE SAMPLES**

Entrepreneurs and managers reported that MIA trade fairs were useful tool for price-lists and sale samples decision-making tool. The MIA meetings were used as an objective mechanism to assess the relative need of clients waiting for appropriate goods and cost proposals.

### **9.1.1.5 STRONG SUPPORT FOR THE MARKET PROMOTION ACTIVITY**

Entrepreneurs expressed their strong support for the concept of consistent specialisation of the exhibitors according to their real core business, enhancing “Made in Africa” concept and transparent market information, as result of being all together in the arena, from which get in turn (because of the itinerant asset of MIA fairs), facilitate equitable access across Africa. Results: increased information about African products and abilities, reduction of long intermediation chains, easier approach to the market access without requirements of personal links and other barriers’ by passing contrivances.

## **9.1.2 WHAT DID NOT WORK?**

### **9.1.2.1 TECHNICAL DIFFICULTIES WITH MIA**

Entrepreneurs reported that the specialisation factors weren’t specific enough for each sub-sector (e.g., leather traders and footwear plastic components were in one group, together with raw material and finished goods). Entrepreneurs suggested the need for greater specificity of the marketed items to reflect the unique characteristics of each sub-sector. In addition, the MIA specialised sub-sectors did not provide profiles. The time scale allowed for preliminary identification for the company matching between buyers and sellers was one or two days before the date of the meetings, which is an insufficient projection period especially for international clients. It was difficult to rate the impact of the problem on function for clients who were in the process of selecting proper complementary partners, as promised by means of a specifically supported activity named “buyers and sellers meeting”. Better at this stage to leave free encounters through the fairs, if it was not possible to design proper “company matching” profiles. Another difficulty encountered by entrepreneurs using the MIA services it was the limited commitment to research a wider variety of potential buyers to be invited to the fairs. Visitors’ diffidence was also affected by the supposed low profiles of the exhibitors. In fact entrepreneurs also expressed difficulty in describing the primary products for clients. These and other problems would have been solved by means of appropriate training plans related to market promotion and marketing.

### **9.1.2.2 PROCEDURAL DIFFICULTIES WITH MIA ORGANISATION AND MANAGEMENT**

Entrepreneurs have identified a number of issues that diminished the overall acceptance of AFLAI as the subject of the organisation process of future MIA events. AFLAI did not appear to be a useful tool for the privatisation of MIA, according to the original design for transferring the MIA Executive Agency functions from ITC to the African cluster network. Some management outputs were most often used directly by ITC, like hidden caseload criteria, and never showed outside. ITC alone established budget assignment, preliminary activities, allied agencies guarantees etc... . In addition, other factors affected AFLAI aptitude to provide adequate support services to the program. These included the existence of pre-established priorities (e.g., AFLAI is the African cluster network agency for statute, the function has not been built from the bottom, local and regional associations that would have organised the trans-African network), the small availability of human resources devoted to the project tasks, lack of communication especially in English language, and differences in the nature and loom to set up a trans African network expressed by different sub-sectors or markets, as well as different rules played in their local networks by the professionals embodying the AFLAI panel, across the African regions.

## **9.2 MIA PRIVATISATION GUIDELINES**

Early in 1998, ITC provided further support for the development of AFLAI. A steering committee was established to identify ways to promote the sector and to establish the AFLAI as the future Executive Agency to manage MIA. A stakeholder group, which included more than 15 local and national or regional associated related to more than 20 Nations, from State promotion agencies to private enterprises, associations, training institutes, and professional bodies, met on several occasions in biannual briefings plus the biennial encounter with the MIA fairs, to draft practice guidelines for taking over the management of MIA, to prioritise locations for the envisaged MIA events, for getting better capacity building of the organisation.

The document, insufficiently completed, "*Impact de MIA 2002 sur le secteur du cuir africain*" was released in October 2003. This document was designed to assist future discussion about MIA assets and the African cluster networking. Despite the strong commitment of ITC and other professionals and agencies to the plan (e.g. ASSOMAC that support a biannual encounter of the AFLAI steering committee, or UNIDO and CFC assistance to the expertise seminars), up to now the association has failed the assignment to be a network on continental bases, and may not be the Executive Agency of the MIA administration in future. Currently ITC substitutes the Executive Agency and is also acting as supervisor in view of next MIA 2004 of Addis Ababa. ITC will be in charge of finding out new links for transferring, either all in one time or step by step, the MIA project to the private sector.

## **9.3 EVALUATION OF THE SUSTAINABILITY OF MIA**

### **9.3.1 OPINIONS FROM THE PRIVATE SECTOR**

Despite the returned questionnaire of the AFLAI survey were few, the opinions, confirmed also by the interviews, were favourable to the "nomadic" MIA, and many entrepreneurs expressed favourable opinions in order to transfer MIA to the African sector, but they were afraid of the responsibility, so the solution to continue with the supervision and support of ITC would have been preferred, and many entrepreneurs expressed not a very positive opinion about the role of AFLAI. Similar reactions have been verified also with other about 30 sheets received after the AFLAI survey document was completed. Still pointing out that findings from this evaluation cannot be generalized to the entire number of entrepreneurs within a known degree of statistical confidence, it is remarkable that one of the questions on the feedback sheet was whether the performance of MIA was adequate to the business outcome; the replies generally have been "yes". The majority of respondents indicate that the trade fair in Tunis was adequate reflecting some conviction that it is positive for business to have an African trade fair. When asked about participating with or without ITC benefits contribution,

respondents suggest better to continue like now, with grant contributions, and also indicate that they could not participate to MIA without cost benefits. During the interviews with the entrepreneurs, when asked to explain their position on this matter the most common comments were:

- » Certain criteria and expectation were not realistic, were exaggerated, Africa is still too behind.
- » Management strategies already exist, why to change them?
- » Privatisation or not, guidelines have been already established within the ITC framework, as resulted from the ITC – AFLAI links, and a certain distance between MIA executives and entrepreneurs doesn't help commitments by new entries.

Other suggestions to assist with the implementation of the privatisation include: the need for good information from ITC sources and the need for additional support staff to assist with the privatisation process.

Others suggest that MIA experience is good, but the realisation of the all African event is not sustainable without important external factors, like funding from the international cooperation, and they believe that the experience achieved with MIA, in absence of further implementation under the cooperation umbrella, at least could be used as a reference to guide the development of specific regional trade fairs.

### 9.3.2 MIA SUSTAINABILITY: BENCHMARKING

If we take a look, for instance, at an important exhibition of the leather sector in Europe, we may observe that the basic cost of the fair may be around USD 236.000, compared to USD 150.000 according to the budget report of MIA. The promotional costs, being of different origin and composition, may be put also on the tune of USD 800.000 in Europe and USD 925.000 referred to MIA, for a total of 370 exhibitors at MIA and 367 in Europe. The parameters, therefore, are in close proximity, but the European fair received many visitors, between them many selected buyers, in the quantity of 31.985 people, while MIA received 2.200 visitors only.

For this, the net cost that burdens on every exhibitor of MIA is similar to that in Europe, (USD 2.929 for MIA compared to USD 2.800 in EU), but the cost that burdens on every exhibitor for each possible contact with clients, it is much higher in case of MIA (USD 489 for MIA, against USD 32 in Europe).

ITC is expected to achieve an improved balance between costs and visitors prior to transfer the fair to the private sector.

**Box 8 Table: Benchmarking MIA expenditures**

ITEMS	Currency (unit)	MIA	SIMAC
Basic costs: Trade fair	USD	150.000	236.000
Promotion costs: Conference, Seminars, Expert group meeting, Buyer-seller meetings and MIA services, Subsistence allowances, Promotion and logistics management	USD	925.000	800.000
Exhibitors	No.	367	370
Visitors	No.	2.200	31.985
Total costs supported by the exhibitors (per capita)	USD	2.929	2.800
Total costs divided per visitors	USD	489	32

## **9.4 SUMMARY OF OBJECTIVES AND EVALUATION OF THE PERFORMANCE INDICATORS**

1. A Priority objectives' scale was developed as a result of extensive coordination between three main projects, thought synergic, within a unique export trade promotion concept, and it was implemented, as described in these papers (in the chapter "Concept and Design – sub title: Objectives and Outputs"), with the following syntheses: "...to boost intra-African trade and Africa exports to international markets", "...to build and strengthen the capacity of institutions, particularly leather trade associations and training centres", "...to enhance the competitiveness of leather sector enterprises (particularly SMEs), "...to establish a regional networking mechanism, to enhance the coordination of development efforts among various donors organizations".

2. An evaluation of the objectives was envisaged according to predetermined performance indicators, (again described in the "Concept and Design" chapter).

[a. Throughout the program -1996-2005- at least 300-440 African enterprises, mainly SMEs and participant to MIA event, should directly benefit by increasing their production and marketing skills -at least 20-40 new trade contacts for each-; b. New annual trade transactions at regional and international levels; c. 3000 to 4000 buyers of African products will have gained a wide knowledge of the offer in the leather sector; d. 80% to 90% of African National and regional associations, training centres and other institutions would have a clear insight into the present status, common problems, possibility of trade cooperation; e. Over the duration of a seven-years period, ten enterprises per year would increase their exports by 5-10% annually f. At the end of the long-term Integrated Program at least 50 to 70% of African enterprises would use successfully the networking information system g. No more overlapping or duplication of technical assistance activities occurring by the international organizations active in the leather sector in Africa].

Those parameters of evaluation will expire after MIA 2004, but the predetermined performance indicators in object are far from the real intervention's conclusion, and somehow they seem to be unrealistic. It is possible that during the project implementation, due to technical and procedural difficulties with the extent of objectives, the parameters of evaluation were discontinued before last Tunis MIA event.

3. However an integrated selection of projects, sometimes divided then grouped according to priority settings, began in 1998 with emphasis on the principles of consistent coordination between intermediate agencies and cooperation bodies as defined in the CLIA strategy. The outcome of these initiatives was the development of several activities, like web sites, trainings and specific seminars interconnected with MIA and AFLAI development. Entrepreneurs indicated that these single activities contained sufficient quality in terms of T.A. for each single service. Sometimes less, but the mass is positive.

What is impossible to realize, is the outlining of all these activities in one integrated strategy starting from the peripheral point of view of intermediate agencies, including programmes designed according to different methodologies and different donor strategies. Coordination will be achieved simply if entrepreneurs will use these experiences and services for the orientation of new market improvement and for prioritising interventions through cluster' networks.

## **9.5 LESSONS LEARNED**

There have been many lessons learned during the evaluation of MIA. The lessons learned are organized into the following categories:

- Lessons learned regarding the project design
- Lessons learned regarding implementation
- Lessons learned regarding market impact

### **9.5.1 LESSONS LEARNED REGARDING PROJECT DESIGN**

It is clear that the dealing with the specificities of a cluster made of different field industries is limited when designing a tool that must be applicable to many different sub-sectors, even if interconnected. There are conflicting objectives and activities, several categories, several models of service and a broad range of local interests. This makes it difficult to establish acceptable levels of reliability and validity of the scale of priority between the set of objectives. A better solution would have been to divide MIA trade fairs according to specific prioritisations of the main sub sectors (e.g. raw material, tanneries, accessories, synthetics, chemicals, machines, designers, footwear, garments, leather goods, intermediation, cooperation, training, magazines) that would have contained the unique characteristic of the African all comprehensive leather cluster and the common practice patterns.

A significant investment of time and resources is still required to develop, evaluate and document the reliability and validity of a continental-wide priority rating scale for the sub-sectors: are there chances for components? finished products? large industrial sectors? or SMEs? . Then it depends from the selected country where to locate the MIA trade fair through the implementation years, if it is better to accentuate leather tanning, or sub contracting shoe manufacturing etc... . What successful company-matching may outcome from an exhibitors' context characterised by footwear components and assembling units facing buyers' scenery characterised by raw hides and skins traders.

Failure to follow the technical steps necessary to achieve reliability and validity may result in poor decision making, wasted resources and frustrated participants. A detailed plan for establishing reliability and validity is essential before beginning to develop each MIA fair, including company matching for buyers and sellers meetings, company visits, side seminars, etc... .

It is especially important to obtain a commitment to the plan, including the resources required to accomplish each steps in the validation process, realizing that the plan may require a long term commitment over a number of years, envisaging different leading themes according to the envisaged locations, as well as according to the needs to include step by step all sub-sectors within their specific strength points.

The involvement of entrepreneurs in the development of MIA is critical to ensure that the resulting outline is acceptable and practical. Large numbers of entrepreneurs, representing usually exporters and domestic oriented manufacturers as well, have to participate in item generation, item selection and methods of score of MIA events.

Extensive consultation will be also an important element of the evaluation of MIA, including the principal key actors of the African sector, not only limited to those debriefings between accredited representing organisms.

Entrepreneurs should also be involved in the development of prioritisation instruments to ensure that the priority setting criteria are fair and non-discriminatory from the enterprises' point of view.

## 9.5.2 LESSONS LEARNED REGARDING IMPLEMENTATION

MIA, as integrated project, was implemented through a “networking the networks” approach allowing regional facilitators to network entrepreneurs in each region/country. While this approach worked well in the time frame provided, prior the implementation of the trade fairs, with the quick set up of AFLAI, in any case a communication tool, this approach is not recommended when consistency is the goal. It should be better to eliminate hierarchies between networks. This method would enhance scale reliability of envisaged sub regional cluster networks and possibly a trans African cluster, but focused only on the MIA process as common interest.

Sufficient resources are required to balance the decrease in commitment resulting from the time required to implement new stable tools for networking the sectors. It is difficult to implement a new tool that negatively impacts on communication between the clusters when other intermediate agencies, associations, or other various organisms continue to grow outside the initially designed scheme.

An ongoing commitment to management is required from ITC, or from ITC plus partners when implementing a new tool such as the envisaged MIA, not granted from cooperation’s donors. A “one time only” opportunity may not be sufficient especially if constant selection throughout the continent is essential.

## 9.5.3 LESSONS LEARNED REGARDING MARKET IMPACT

It is clear that a MIA trade fair will not result in equitable access to trans African markets for all African and non African leather business opportunities. The MIA may contribute reaching the goal of facilitating access to African markets by providing a consistent approach to specialisation, but it is unrealistic to expect that the MIA alone will determine the business improvement goal as a service to entrepreneurs.

Other factors such as pre-established technology levels within each sectors, the availability of natural resources and differences in the nature and approach to free trades across the continent, all affect the provision of uniform access to industrial development.

Together with implementing every new MIA trade fair, the infrastructures system/environment should be carefully reviewed to identify system barriers (e.g., custom duties, transport, communication system, investment regulations, marketing instruments, financial tools). Once identified, efforts could be directed toward changing or eliminating these barriers.

The MIA framework emphasizes a number of technical assistance concepts to enhance export development. These concepts include:

- ❑ Internet sites of importers and of finished leather products, as well as of semi processed and raw material
- ❑ Production of an African leather magazine
- ❑ Public relations through press releases and other activities
- ❑ Monitoring the technical assistance needs
- ❑ Trade support activities (?)
- ❑ Creation of regional and national associations
- ❑ Hides and skins recovery assistance

The single act of including these concepts within the MIA context is not sufficient to get them effective into practice. Other strategies, such as educational initiatives or regional forums, would provide professionals with opportunities to discuss appropriate ways of integrating these concepts into practice.

Educational strategies should have been in place prior to the introduction of a new tool such as next cycle of MIA trade fairs. It should not be assumed that a new tool could provide changes. Tools like the trade fairs should only be used to support changes in practice.

## 10. PERSPECTIVES AND FUTURE ORIENTATION

### 10.1 ORIENTATION

This evaluation of MIA aspects of trade fair and cluster networking has identified several areas for future orientation:

#### 10.1.1 MEASURES TO GET MIA TRADE FAIR SUSTAINABLE IN VIEW OF ITS PRIVATISATION

Research is required to develop standardized measures of outcome for the evaluation of the sustainability of MIA.

It is difficult now to define the sustainable break-even point of MIA events. Sustainability is determined by several factors: the location is a standard factor, the ability of the organizers to put it together also is a standard factor. If we go through all this things positively together, it will be possible to make it sustainable; it may not be a very big event, but a sustainable African grand event with ITC support which will be limited to only those very specialized areas where international agencies are supposed to participate.

The evaluation results, from this project, has identified already the need for the development of appropriate outcome measures to guide decision making related to: trade improvement through appropriate company matching, buyers increase, infrastructures upgrade, improved management, prioritisation of sub-sectors, networking of African entrepreneurs.

The determination of MIA in the appropriate environments, as selected African countries where the leather sector plays a key role in the local economy, and the prediction of partnership naturally outcome during the implementation process.

In addition, research is required to develop standardized proposals that are *buyers focused*. Proposals could consist of a combination of outputs, like managers' training and identification of reliable partners for the trade fairs, mixed with promotion through buyers and/or company matching. The development of market oriented proposals could focus on the following points:

- **MIA management tool**, in particular selection of trade fairs organisations, creating an independent Executive Agency, managed by some key players of the leather sector throughout the continent, under the supervision of ITC on behalf of donors (if any), or ITC in joint venture with commercial partners operating as trade fair organisers, possibly located in Africa. Training outputs, in order to set up an Executive Agency able to act in response of the following basic requirements to organise international fairs:
  - identification of culture-bound behaviour and culture-bound conduct;
  - measurement of the effects of the encounter of different cultures;
  - development of comprehension of the cultural differences;
  - practical problem-solving ability.
- **Alliance and constant sounding between MIA management and the African leather cluster**, networking the key players within a trans-national network. In terms of its institutional status, the trans-national network should be fully autonomous and independent from the regional and national leather sector networks. The services of the trans-national cluster are consequence of the services and resources of the regional partners, but should not impede the services of some promotional state offices, state or private intermediate agencies, or some private groups, or single enterprises operating throughout the cluster. Therefore, rather than providing newer services, existing regional services are to be harmonised and opened to enterprises of the partner regions.

### **10.1.2 EXPLORE THE RELATIONSHIP BETWEEN CERTAIN MARKETS AND AGENCIES THAT MAY CO-PROMOTE AND CO-ORGANISE MIA TRADE FAIRS**

Studies are required to examine the relationship between certain markets, in Africa, and possible local agencies representing instances for the organisation of MIA events. Does identified agency support and promote the sector? Does identified agency increase the effectiveness of financial sustainability of MIA? Further studies are required to study potential outcomes related to regional/national industrial assets in order to compare and contrast various models of event outlines. These types of studies could identify the strategies that provide the maximum benefit to the export promotion.

### **10.1.3 EXPLORE THE RELATIONSHIP BETWEEN BUYERS AND SELLERS**

Results from this evaluation will reveal a strong relationship between market oriented entrepreneurs and clients' needs.

Further research is required to improve our understanding of this relationship, especially within the international clusters' enterprises, as single or involved by National or sub regional organisations. Entrepreneurs will only participate to MIA if they think they can use the fair to find new business opportunities. In order to facilitate the understanding of the trade fair concept it will be prepared a database containing the economic and technological profiles of exhibiting or potential exhibiting African enterprises, in order to create an informal exchange of experiences between the networks of private entrepreneurs contacting buyers worldwide. The database may be an evolved model of the actual web system administrated by ITC in the leather field.

The trade fair will be divided between the different sub-sectors and markets to facilitate company-matching.

The inclusion of the whole international leather cluster is the final goal, so targeted subject of the promotion activities will be:

- ❑ African Partner Enterprise (Main beneficiaries) as singles
- ❑ Regional networks
- ❑ International Partner organisations

### **10.1.4 TEST THE VALIDITY/RELIABILITY OF THE MIA DEVELOPED BETWEEN THE PRIVATE SECTOR**

Initial testing of the entrepreneurs' satisfaction level indicated that MIA trade fairs have been useful indicators of market oriented reforming process of the African leather industry system. Some sellers and buyers satisfaction have been recognized within the MIA services. Further testing of these outcomes is required to refine the validity and reliability of MIA. Factors analysis is required to validate the findings from this project with other international visitors such as clients who have already visited MIA. In addition, the concepts and contents of MIA should be constantly evaluated by using the comparative models of other trade fairs at international level. Further studies could assess the suitability of MIA for assessing the African leather market experience with other international markets. Finally, further testing is required to test the internal MIA parameters to measure variations in African entrepreneurs satisfaction, as per the following sensitivity targets, "test of capacity to do", designed to detect changes in market satisfaction over time:

- Involve enterprises in MIA trade fair by offering multiple support services, including the provision of enterprise profiles and the maintenance of a co-operation partner exchange for international co-operation projects.

- Create co-operation relationships between enterprises and leather sector poles from the different partner regions by using international intermediate agencies and programs.
- Deal with inter-cultural particularities: implications for trans- African leather sector networking, to suggest the improvement of the African regional integration of the leather sector.

## **10.2 SCENARIOS**

### **10.2.1 ABOUT MIA**

Scenarios are determined by two factors:

- The role of the Executive Agency, “Who is going to manage MIA?”.
- The priority scale of the African markets, “Which African Market? Who are the key players?”

These are necessary pre-requirements to reply to the questions about with whom to organise future MIAs, and where to locate the MIA trade fairs and the leading themes to be selected for each event.

#### **10.2.1.1 WHO IS GOING TO MANAGE MIA?**

Although several expressed intentions to transfer the organisation of MIA to AFLAI appear in the project literature, there is no formal agreement about this and recent ITC reports recognise this option as impossible at the moment. A possible scenario is to set up AFLAI on new bases, starting from regional and national networks, but this means that MIA will be suspended until when the cluster network will be in condition to take over this obligation, just not a very dynamic picture.

Apparently the only probable scenario is to construct an independent Executive Agency. The framework will be designed to develop the entrepreneurs’ satisfaction, as part of the set up of clusters’ networks throughout Africa. The Executive Agency could be used as a foundation to develop and test a general networking plan, but starting from the MIA services.

In a future scenario a Trans-African network will not necessarily exist. There is not a model of network like this in other parts of the world, nor in Europe where connections between National associations are limited and specialised.

If justified, the trans-African network will start with contacts at the level of the regional cluster organisations with the target to interconnect different clusters. During this phase, it will be necessary to build up the regional clusters networks, then regional networks should facilitate enterprises’ access to existing services in the field of inter-enterprise co-operation relationships and after this, mutual trust may be enhanced between the regional clusters to establish a trans-African association.

#### **10.2.1.2 WHICH AFRICAN MARKET? WHO ARE THE KEY PLAYERS?**

Results from some international monitoring system data (ITC; FAO, SATRA, ASSOMAC) reveal a trend showing decreasing numbers of referrals to the African leather sector as well as decreasing amounts of investment conditions across all regions in Africa. Further evaluation is required to determine the actual reason(s) for this decline.

## ***CLUSTER'S CONSTRAINTS IN AFRICA***

### **East Africa**

Recorded: 92 tanneries, 689 footwear manufacturing units, 554 of leather goods and garments, 8 institutes for the research and training.

### **Southern Africa**

Recorded: 79 tanneries, 125 SMEs of the footwear sector, 74 producers of leather goods, 3 training organisms.

### **North Africa**

recorded: 407 tanneries, 7000 footwear producers including cottage enterprises, 1000 for the leather goods and garments, 4 training, technical assistance and quality control institutes.

### **Central Africa**

Recorded: 4 tanneries, 50 medium-large footwear units, 65 producers of leather goods.

### **West Africa**

Recorded: 47 tanneries, between them 38 are located in Nigeria, but their number is growing, only one in Burkina Faso (one company, divided between 3 units), 1 in Cote d'Ivoire, 3 in Mali, 2 in Senegal, the footwear producers including the whole SMEs sector are 1735 and 2 leather-footwear centres.

### **Footwear Production**

Recorded in 2001: 1,9 million pairs, 1,6% of world production, divided between: Egypt 6,1, Morocco 62, Tunisia 68, Uganda 1, Zimbabwe 9, others 7.

### **Footwear Market**

Recorded consumption, 463 million pairs, production 50% of consumption, Maghreb (Egypt, Tunisia and Morocco) produces 42% of total output, total export 34% of production, 93% is the export's quota of Maghreb, official imports 67% of local consumers market.

### **Major Exporters and Importers**

Increased quantities of shoes are being resourced from North Africa for EU countries. In 2001 Tunisia and Morocco both expanded production and exports of footwear to the EU.

In South Africa the Shoe industry continued its decline, year after year, that has been happening since 1994.

Imports are mainly from China, major importers from China in Africa are, in order of volume of imports, Togo (about 40 ml/p.), Cote d'Ivoire (36 ml/p), Nigeria (29 ml/p), Mozambique (7 ml/p.), Ethiopia (6 ml/p.), Senegal (4 ml/p), Algeria (3 ml/p), Kenya (2 ml/p) and Malawi (1 ml/p).

## ***COMPETITIVE CONSTRAINTS***

Currently the Small and Medium scale producers' category appears to be the hardest hit group by flooding of the market by cheap Chinese footwear.

The following are some of the constraints faced by many large and SMEs that dominate the sector.

- Lack of formal training for those who are employed in the sector, due to the decline of the training infrastructures.
- Lack of finance or access to credit for those engaged in production in the leather sector, inheritance of the high indebtedness

- Lack of financial management and business management skills of the enterprises, due to the low level of maturity of the communication system
- Lack of coordination and concerted effort, lack of public or private dialogue, and lack of cluster management

While the SMEs manufacturers decline, the informal sector is promising.

The informal sector does not receive T.A. from the cooperation system, except from UNDP programmes and NGOs activities, designed to fight famine and poverty but not at the stage of upgrading consolidated small scale family business.

Apparently in the last 10 years the informal sector has grown very much in some countries. The informal footwear production, that is considered the lowest sub category of footwear production, but that employs large number of people with fluctuating number throughout the year, is coming up, and although there are differences among this type of shoe producers, and most are marked by the low quality and cheap cost of their products, seasonal production and non-specialized actors, there is visible improvement at all levels of footwear production in quality of product, fashion and design followed in response to the fierce competition with the imported products.

These characteristics make upwards mobility from this sub sector to higher subsections of footwear production. It is difficult but not impossible, since there are examples of large footwear producers who were able to rise up starting from this level.

MIA project, and allied associations, should research an appropriate funding formula for the participation of those sub-sectors that need more rehabilitation services. More research is required to contribute to the development of an appropriate funding formula for that component of MIA that must be co-financed by cooperation, and that are possibly sustainable by the market. Further testing is required to identify statistically significant exhibitors and visitors that affect resource utilization.

### ***WHERE TO LOCATE NEXT MIA EVENT?***

Currently the discussion around the location of the MIA events launched by the AFLAI doesn't have enough diagnostic to be commented. It is not possible to solve the problem at this stage, the rotating system utilised up to now has allowed different evaluation of the events. If next exhibitions will also obtain better results of those of Casablanca or Tunis or Addis Ababa, MIA will be eventually continue through those countries.

Actually several partners are ready to apply for the set up of next MIA following Addis Ababa:

- a) CNCC as expression of the local association system in Tunisia, as follow up of the good performance achieved with the MIA 2002
- b) The Chamber of Leather & Fur in Egypt, where a new trade fair has been presented. The "Cairo International Leather Show" which will take place for the first time from 9th-12th December 2004 in the Egyptian capital
- c) CICES, in Senegal, the agency designed to promote the SMEs sector, that has long terms experience of cooperation with ITC for promoting the MIA events through the local leather and leather good enterprises. CICES is tied up with the local entrepreneurs' associations. The local candidate organisers think to set up the event in cooperation with other intermediate agencies of the Sahel area, namely Niger, Mali, and Burkina Faso
- d) ESALIA, the regional sector association located in Nairobi, if the response of the associated national organisms will be positive
- e) SAFLEC (South Africa Leather Export Council) in South Africa, within the context to rehabilitate the trade fair of Durban

## 10.2.2 ABOUT AFLAI

It is not possible to predict Scenarios for AFLAI since it does not exist one similar example in the leather world market. The implementation of cluster networks varies considerably from one region to another, and from one production sector to another. The scenario therefore may not result from an in-depth empirical analysis of other models of cluster networks and from cross-cluster comparisons. There are three specific elements that characterise as unique the experience of AFLAI:

- a) AFLAI covers a very wide market area, extended to the whole African continent
- b) AFLAI includes all allied sectors within the leather technology sector, extended also to some comparable products, like plastic shoes and their components.
- c) AFLAI has been established and its operational asset is independent from the existence of regional or national networks, including among the associated single entrepreneurs, other intermediators etc...

When looking for models to establish trans-national cluster networks we find that several sub-sector associations covering wide market areas, or cluster networks, are limited within regional market areas.

COTANCE in Europe is related to the leather-tanning sector. Within COTANCE framework the common interests between the members of the same sub-sector may be easily identified even throughout a trans-national market area. The leading policies grouping the national associations members of tanneries between several EU countries are the implementation of advanced technology projects in the field of environmental protection, quality assurance and high-tech applications for the leather production process. We may assume that the COTANCE network is mainly based on environment and technology issues that are common problems for the European tanneries, that have to face an EU extended legislation system for the environmental protection. This is mainly a technology network where the tanneries, that are often SMEs, are faced with the need to improve their technological capability and to lower environment polluting impact simultaneously.

ESALIA is an example of a regional cluster network, grouping several associations of the COMESA market area including all themes related to “leather and non leather sectors”.

ESALIA it is also an output of the cooperation system and was born out of an urgent need to have a coordinated approach in charting out short and long term development strategies for the continent leather industry. Differently from AFLAI, this trans-national association is based on the existence of national associations, and also only national associations are connected with it.

The regional market covered by ESALIA is limited to a group of countries that are already promoting inter linked activities between various economic and political issues, and in the leather sector as well, like a COMESA leather institute. The vertical integration between the leather industry through COMESA markets is still the main objective, and finished leather products, raw hides and skins, semi-processed leather and finished leather sectors can interact by starting from more or less the same level of technology and capacity building within the referred area.

Apparently the ESALIA project, despite the wide range of products involved, is somehow similar to that of COTANCE, from the point of view of the identification of common interests between the members. With the market area extension concerns, however it must be underlined that the weakness of many associations involved in ESALIA allowed the association to turn out to be a semi independent promotion agency operating through the sector, instead of a real interlinked regional network.

The model to establish a trans-national technology network, as resulted from the analysis of the experience of other cluster organisations and national associations (through meetings, but also workshops and the evaluation interviews), definitely presupposes the existence of regional networks and consists of creating overall trans-national networks formed by the interlinked regional networks.

AFLAI could be reformed in order to be the intermediate agency outlined to set up and implement the MIA fairs, independently from the existing African sector related networks, --when granted a feasible asset-, but regarding the target of setting up such a network, a phased approach is recommended. It consists of several progressive (and manageable) steps aimed at avoiding failure to fulfil the expectations of the main beneficiaries. In a first stage, only the regional network managers are involved in the setting up of the trans-national network (different from actual institutional framework that preview the presence of different actors). This process is difficult without the coordination of an external advisory body (ITC) to manage discussions and to communicate the added value and advantages of such a network (the advantages must be higher than the costs incurred by the regional clusters in harmonising and opening up their networks).

The second stage is characterised by the integration of enterprises into the network, through the promotion of MIA events and inter-enterprise relations and through the use of the follow up services by enterprises seeking new business opportunities.

It is the MIA trade fairs project that helps the set up of a trans-national association, not the so called association that develop the MIA project.

## 11. CONCLUSION

MIA was designed as a project with a limited lifespan. Within the cycle of the project implementation every output has contributed to improve the visibility of the MIA international events, designed to improve business within the African and international leather sector.

Each single event that has been implemented up to now, Cape Town, Casablanca and Tunis had different results, but the tendency has always been in favour of growing number of participants and growing business, as well as new performances as follow up projects to upgrade know how and technology.

The organisation of MIA has been efficient, but mainly managed from the outside, and the African intermediate agencies have been superficially involved.

MIAs are still not sustainable without the contribution of the international cooperation. Besides the general and organizational costs of the events being in the norm, the MIA's participation measure should increase the actual relationship between buyers and exhibitors from 6 buyers for 1 exhibitor to at least 10 for 1, in order to be able to transfer the organisation of the events to the private sector.

AFLAI was designed as an establishment, then enhanced to change also MIA from a temporary project to an establishment. The makeover of MIA, when transferred from cooperation agencies to the private sector, is justified by the assumption that AFLAI will become a trans-African leather cluster network, strongly related to the whole African leather sector. Actually AFLAI is not such a network. So the fault of lack of sustainability of MIA is linked to some extent to the form in which the project was designed with a short lifespan. At a first stage a restricted Committee including as much as possible the regional network managers, or other well known professionals have been involved in the setting up of the trans-African network, through a process that benefited of technical assistance provided by ITC, because it was difficult without the coordination of an external advisory body to manage discussions and to communicate the added value advantages of such a network. It may be assumed that the way of checking the success of such strategy could be measuring the advantages that have to be higher than the costs incurred by the regional or National clusters in harmonising and opening up their networks. This did not happen, as confirmed from the low quality of the contribution received by AFLAI, from the private regional and National associated and intermediate agencies. Therefore a second stage characterised by the integration of enterprises into the network, through the promotion of African MIA Fair/Symposium and through the use of the network services by enterprises seeking new business opportunities has never been implemented. All contacts at the level of the regional/national cluster organisations with a view to inter-link different clusters have been limited to the unilateral offer of services from ITC, while in this phase it would have been necessary to build up trust and mutual relationships between the regional clusters.

MIA will be rehabilitated with more specialised sub-sectoral specialisations, and re-organised through a reform of its management tools. A funding formula will be studied finding new commercial partners in the African market, while the communication system between MIA and the private sector will be reformed, creating a new trans-national network, and expanding the promotion services, in order to attract more qualified buyers.

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**Torino, Monday, 24 May 2004**

**FINAL EVALUATION OF MEET IN AFRICA**

**Principal: ITC**

**a- REPORT**

**b- ANNEX 1**

**(Resume of Contacts and Documents of the Evaluation)**

**b- Annex**

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**Box 1 Acronyms**

<b>AFLAI - FACIC</b>	African federation of leather and Allied Industries – Fédération Africaine du Cuir et des Industries Connexes
<b>ASR-PCP-DAO</b>	Association sous régionale des professionnels du cuirs. Peaux et dérivés de l’Afrique de l’Ouest
<b>ASSOMAC</b>	Associazione Nazionale Costruttori Macchine dell’Area Pelle (Italian Leather Sector Machine Manufacturers Association)
<b>ATC</b>	Association Marocaine de Tannerie
<b>BICF</b>	Bureau des Ingénieurs Conseils et Formateurs
<b>CBI</b>	Centro for Promotion of the Imports from Developing Countries
<b>CDE</b>	Centre of Development of the Enterprise
<b>CFC</b>	Common Fund for Commodities
<b>CICES</b>	Centre International du Commerce du Sénégal
<b>CLIA</b>	Coordinated Leather Industry Assistance
<b>CMPE</b>	Morocco Export Promotion Centre
<b>CNCC</b>	Centre National Chaussure et Cuir de Tunis
<b>CNTC</b>	Centre National Textile Cuir Chaussure et Jouet, Algeria
<b>COMESA</b>	Common Market for Eastern & Southern Africa
<b>DTI</b>	Department of trade and Industry of South Africa
<b>ELIA</b>	Ethiopian Leather Industry Association
<b>ESALIA</b>	Eastern & Southern African Leather Industry Association
<b>ETA</b>	Ethiopian Tanners Association
<b>EU</b>	European Union
<b>FAO</b>	Food & Agricultural Organisation of the United Nations
<b>FEDIC</b>	Fédération Marocaine des Industries du Cuir
<b>FNCC</b>	Fédération Nationale du Cuir et de la Chaussure, section de la Union Tunisienne de l’Industrie du Commerce et de l’Artisanat.
<b>ICE</b>	Istituto nazionale per il Commercio Estero (Italian Foreign Trade Office)
<b>ITC</b>	International Trade Centre
<b>LIRI</b>	Leather Industry Research Institute of the University of Grahamstown, South Africa
<b>LLPI</b>	Leather & Leather Products Institute of COMESA
<b>MIA</b>	Meet in Africa
<b>MOU</b>	Memorandum Of Understanding
<b>NCC</b>	The National Coordinating Committee (of MIA)
<b>OM.BE.VI.</b>	OFFICE MALIEN DU BETAAIL ET DE LA VIANDE
<b>PAPEL</b>	Projet d’appui à l’élevage, Sénégal
<b>P.R .</b>	Public Relation
<b>PROINVEST</b>	PROINVEST is an EU-ACP (Africa, Caribbean and Pacific) partnership programme developed and undertaken by the European Commission on behalf of the ACP countries. PROINVEST, is financed by the European Development Fund (EDF).
<b>SHLC</b>	Skin Hides Leather Council in South Africa
<b>SIC</b>	Semaine du Cuir, France
<b>SIMAC</b>	International trade fair of the footwear and leather goods machines
<b>SMEs</b>	Small & Medium Enterprises
<b>T.A.</b>	Technical Assistance
<b>TANNING-TECH</b>	International trade fair of the leather tanning machines
<b>UN</b>	United Nations
<b>UNCTAD</b>	United Nations Conference of Trade And development
<b>UNDP</b>	United Nations Development Programme
<b>UNIC</b>	Unione Italiana Industria Conciaria (the Italian Tanning Association)
<b>UNIDO</b>	United Nation Industrial Development Organisation
<b>WB</b>	World Bank
<b>WTO</b>	World Trade Organisation

## A. CONTEXT

Box 2 Extract from the T.O.R.

### Implementation strategy for the evaluation

An in-depth survey among the African business sector is Phase A of the evaluation. An external evaluation, Phase B, will follow which will draw on the results obtained from the survey and validated in the field.

Part A of this exercise will be carried-out by AFLAI, which will be responsible for mobilizing and coordinating its network for field research, analyzing the information and for presenting the final report that will be the result of research carried out in countries having participated in previous MIA events, by AFLAI's network members, under the coordination of the AFLAI Presidency. The final report should contain information on:

- 1) Quantitative and qualitative results obtained by African enterprises from participation in MIA;
- 2) Specific success stories;
- 3) How to optimize MIA impact from the African perspective;
- 4) Measures to be taken to ensure MIA sustainability and African ownership - the role of AFLAI.

Phase B will be carried out by an independent consultant appointed by ITC in collaboration with the AFLAI presidency. It will cover the aspects mentioned above, combining the results of the AFLAI study and the research work of the evaluator in ITC and in the field.

## 1. Methodology of the Evaluation

The evaluation has been developed after a first phase of acknowledgment of the report documents produced by ITC on the referred programme and of the first evaluation completed by AFLAI regarding last MIA 2002 in Tunis.

After this first phase of acknowledgment, the evaluator started with several missions on the African market area to contact some of the key actors that played a role within the MIA programme and the general trade environment as well.

### **Scope of the Missions**

Objective of the missions is the verification of the impact of MIA events in each of the countries in which the fair has been realized: what about the follow up projects, what has been the impact on the commercial aspects that have been consolidated, or those achievement that have been missed after the event, what the impact in general on the leather sector of the host country. All answers to the questions linked of course to the context of how it has been the impact in the general African trades and PR (public relations) system, as well as the follow up in terms of T.A. (technical assistance) improvement.

### **Program of the Evaluation of the AFLAI Study and of the Complementary Missions**

Analysis of the impact of MIA as reported by AFLAI and meetings with the key actors in the countries where MIA has been/will be organized:

#### **a) The National Coordinating Committee (NCC) that was in charge to organize the event**

Briefing about the set up and the final realization of the MIA events: the problems, milestones and successes of the organization. The role of the local intermediate agencies or institutions that supported/not supported the event. The level of communication through the stakeholders and with the organizing agency (AFLAI).

#### **b) The local association involved**

Evaluation of the impact of the event and of the follow up activities. Level of interest about the MIA events carried out in different African countries.

#### **c) Some local companies that had positive follow up due to the MIA event**

Briefing about the follow up project or the new contacts resulted from the MIA event.

#### **d) Any other meeting with relevant institutions or private entrepreneurs that may be of interest for the evaluation of the event in object**

Not only the local stakeholders, social capital of the field, but intermediate agencies, financing institutions, State bodies designed to promote and support the sector, training institutes etc...

## 2. Scheduled Missions

The first mission has been to Geneva, for a first acknowledgement, then Tunis, where is located the AFLAI main office. Next has been Kenya, location of ESALIA (Eastern & Southern African Association) that is representing ten countries of the Southern and Western area and member of AFLAI too (ESALIA; list of member countries: 1. Uganda Leather and Allied Association, 2. Ethiopia Tanners Association, 3. Kenya Tanners Association, 4. Eritrean Leather and Allied Industries Association, 5. Leather Industries Association of Zambia, 6. Leather Association of Tanzania, 7. Leather Association of Malawi, 8. Leather Chamber of Sudan, 9. Leather Industries Association of Namibia, 10. Leather Institute of Zimbabwe). After Kenya the mission has been developed to Ethiopia, the next host country for MIA 2004, organised in partnership with the local ETA (Ethiopian Tanners Association) and ELIA (Ethiopian Leather Industry Association). In Morocco the local Leather field Association (FEDIC) and some stakeholders have been met, and enquired about the past MIA of Casablanca (2000). South Africa has been visited because it is member of AFLAI and because in Cape Town (1998) it has been the first MIA event. Between other regions of Sub-Sahara Africa, Senegal and Mali have been selected for their participation and involvement in the AFLAI (Mali) activity. Algeria and Egypt have been contacted, as preferred countries of the Mediterranean free trade zone with the EU, for their important role, in perspective, within the trades between Europe and Africa

### Box 3 Missions calendar/justification

<i>Period</i>	<i>Mission</i>	<i>Details</i>	<i>Justification</i>
October 2003	Lineapelle MICAM	Preliminary meeting with the AFLAI members	Introduction of the evaluation
November 2003	IITC- Geneva	Discussing and screening all concerned documents	First acknowledgement
November 2003	Tunisia	Meetings & interviews	Location of AFLAI
December 2003	Kenya	Meetings & interviews	Location of ESALIA
December 2003	Ethiopia	Meetings & interviews	Location of MIA 2004
January 2004	Morocco	Meetings & interviews	Location of MIA 2000
February 2004	South Africa	Meetings & interviews	Location of MIA 1998
February 2004	Senegal	Meetings & interviews	Participants to MIA, important trading market for the leather sector in West Africa: key actors interested to set up a MIA event in the country
February 2004	Mali	Meetings & interviews	Participants to MIA, key actors involved in AFLAI and Regional development of the sector
Informal meetings	Algeria	Meeting	Interesting area under rehabilitation of the sector
Informal meetings	Egypt	Briefing at distance	Organisation of an international trade fair

## **B. EVALUATION FRAMEWORK**

### **1. Assumption**

The project MIA started on 1998, and its first cycle of events will be ended after Addis Ababa MIA 2004.

#### **Objective**

**MIA is a project designed within the context of the Integrated Leather Sector Export Development Programme for Africa (RAF/47/72), whose main objective is to assist the African leather sector (or cluster) in achieving sustainable growth through improved competitiveness and expanded trade with a social development impact in terms of employment.**

#### **Strategy**

The programme has been designed with the aim to create the capacity and adequate conditions for the leather business community, national and regional institutions, and associations to facilitate the inter African and international trade expansion opportunities on a permanent and sustainable basis.

#### **Planning**

Four events have been totally planned, after the start up of MIA in 1998, with MIA 2000 in Casablanca, Tunis 2002, next will come Ethiopia, Addis Ababa 2004.

Key actor of the management of the event in Africa should be AFLAI, the trans-African cluster association of the leather sector, that was created contextually with the start up of MIA in Cape Town, and that would eventually take over the MIA project. The transfer of the management from ITC to AFLAI has been envisaged gradually, but it would be completed after the end of the present cycle, that means after next MIA 2004.

#### **Means of implementation**

Main partner for the organisation of such project ITC is the Cooperation agency of the UN (UNCTAD) and of the WTO that since 1998 in Cape Town, that is supervising the project and is ensuring the sustainability of each MIA event, in coordination with the Centre for the Promotion of imports from Developing Countries (CBI), that is the main donor of the project Meet in Africa.

The first two events have been organised by ITC with SIC, an international trade fair organisation, while Tunis 2002 included new partners, like CFC, FAO, CDE, ICE, UNIDO and ASSOMAC for the seminars and workshop, for the facilitation of the AFLAI works and assemblies, as well as in order to expand the promotion of the event and to organise groups of EU exhibitors linked to the ASSOMAC association.

The AFLAI, African cluster association of the leather sector, created with the assistance of ITC during the first MIA in 1998 in Cape Town, is very important within the MIA framework, to deal with national and regional intermediate agencies, international donors, governmental representatives, to promote sustainable development programmes to support the leather sector, to improve private and public dialogue of the most relevant African countries, and to cooperate with local training institutions. The AFLAI has set up a steering committee, meeting twice a year under the ASSOMAC umbrella, in order to define work-plans concerning the T.A. to the sector and the feasibility of the MIA events.

## 2. Outline of the Evaluation

### I) **Expected Points of Verification of the Preliminary Screening of Relevant Documents**

#### *The impact of MIA during the set up:*

- ❑ How effective has been the preparatory activity.
- ❑ Level of communication between MIA organisers and the National Coordination Committees (NCCs) of the countries that hosted MIA.
- ❑ Capacity of NCCs to perform their role
- ❑ Level of involvement of key National institutions and leading companies
- ❑ Critical mass of National enterprises participating in MIA (percentage and qualification)
- ❑ Advanced information available on participants from Africa and overseas
- ❑ How available and sufficiently staffed has been the cluster office and with which level to access the regional key institutions and leading companies of the region
- ❑ Have the NCCs been informed of relevant International funding programmes invited to the event and which level of capability to advise enterprises on their application for such programmes?

#### *The follow up:*

- ❑ Trade agreements
- ❑ Trade improvement
- ❑ Upgrading regional leather sector networks
- ❑ Exchange of experience
- ❑ Agreement on regulations and standards
- ❑ Creation of new basic infrastructure
- ❑ Involvement of the enterprises for internationalisation
- ❑ Provision of support services like technical assistance or export promotion projects
- ❑ Creation of business between the enterprises

#### *Evaluation of the abilities of AFLAI*

- ❑ Support in finding co-operation partners in the different African partner regions;
- ❑ Provision of enterprise profiles and maintenance of a co-operation partner exchange;
- ❑ Contacts with foreign partners through the intermediary services of the partner organisations;
- ❑ Information on selected foreign markets;
- ❑ Information on technological developments and the availability of technologies in the partner regions;
- ❑ Information on International funding programmes.

### II) **Preliminary overview: Achieved Information**

With the visit to Geneva, the writer had the opportunity to acknowledge some relevant background documentation, above all the feedback report on MIA 2002 (Meet in Africa) prepared by AFLAI.

The first screening of documents, but including comments and remarks received during several preliminary meetings with the components of the AFLAI board, shows a scenario where AFLAI apparently has failed for the moment to be the instrument to set up and manage the MIA events in future, as well as to network the African leather sector. The Mia events have not been properly

surveyed until now, and despite it is known and demonstrated a considerable success of participants, both from the African leather sector and the EU partner (buyers) entrepreneurs, the evaluation of the impact of MIA on the business trend and the follow up in terms of investments growing, program improvement and business volume has not been evaluated.

Box 4 Remark on the report on the MIA 2002 impact edited by AFLAI

Notes about « *Rapport: Fédération Africaine du Cuir et Industries Connexes - Impact de MIA 2002 sur le secteur cuir africain* »

The document contains a lot of useful information, but the development of the comments doesn't satisfy the objectives of the study.

The commented data are not only inferior to the expectations, since the set of sample questionnaires considered for the analysis is constituted of only 40 participants (less than 30% of total), but are also not representing in homogeneous way all the African regions included in the AFLAI, and particularly have not been included the enterprises of Eastern Africa.

The presentation of the report is rather hasty and inaccurate, e.g. Portugal has been inserted between the African countries. However this is not an element of criticism, apart the suggestion to correct the list of the countries, although induces to think that the collective commitment in the editing of the document has been rather superficial.

All developed comments contained in the document are weak because not supported with a sufficient number of information of good quality.

Due to the poverty of the gathered data it has not been possible to develop any comment around the *Comparative evaluation of the "Impact of MIA by sub-regions"* and also *"...by sector components"*. The sub-regional reports supposed to be prepared by the 10 members of the Executives Committee have not been delivered, except that letter containing some remarks only from Mali, and a report from Chad. In fact Central Africa (representing minus 5% of the total African participation) has been surveyed by completing the questionnaires of more than 40% of the Regional participants.

The chapter of analysis country by country may not be considered concluded: the replies obtained to the concerned questionnaire are not including 15% of the Northern African participants, that were representing about 70% of the total African participants, no one of the Eastern African Sub-region, that represent 17% of the total participation from Africa.

The study should be revised according to the data obtained by at least 40% of the participants, according to the guidelines.

Between the screened documents, the project reports are prevailing in comparison to those of verification. Particularly poor is the analysis included in the feedback report about the countries that participated to MIA the 2002.

The basic data of the screened report are founded on a sample set of filled questionnaires that is below 1/3<sup>rd</sup> of the total participants and it is also not homogeneously distributed between the African markets: English speaking areas of the East Africa, or of Nigeria have been excluded, and other regions are represented in unbalanced way. Verifying the appointment of the AFLAI is also difficult because it doesn't exist a complete file of the AFLAI' activities. Another element of uncertainty is due to the impossibility to verify properly the trend of African exports of the sector related to the MIA events, since a list of identified parameters, to be used as models on which to base the analysis after every event, has not been fixed.

Within this context, proceeding in the verification in a linear way could require a lot of time and could bring non exhaustive results, whereas some wedges that compose the complete mosaic of MIA and AFLAI components may have gone lost (e.g. the poverty of analysis produced by AFLAI).

This is a most probable situation because the great number of countries and partner involved in the project, and because of the limits of communication between the different sub-regions.

**After the acknowledgment, the evaluation has been *focused* on two principal aspects, the verification of the impact of MIA events in each of the countries in which the fair has been realized on one side, and the role of AFLAI on the other.**

All together the two aspects have been analyzed from the point of view of the results in terms of follow up projects, what has been the impact on the commercial aspects that have been consolidated or not consolidated after the event, what the impact in general on the leather sector of the host country. All answers to the questions linked of course to the context of how it has been the impact in the general African trades and P.R. (public relations) system, as well as the follow up in terms of T.A. (technical assistance) improvement.

#### Box 5 Focus of the evaluation

**Aspect of the MIA impact / With the MIA verification concern, the work-plan has been outlined on the visits to the organisms that have managed MIA events in South Africa, Morocco, Tunisia and the association that is preparing Meet in Africa 2004 of Addis Ababa.**

**Aspect of the AFLAI development and activity/ For the issues related to the verification of the role and capacity building of AFLAI, a lot of useful and real information have been picked up through the visits to the African countries that have been selected in the work-plan.**

### 3. Focus on The MIA Objectives

#### I) *The context of MIA 2002 in Tunis*

The meetings of MIA have been the occasion to deliver a message of market improvement through the international leather market, beginning with the African key actors. For this reason MIA has been designed as biannual meeting, started in 1998 in Cape Town, Republic of South Africa (RSA), then in the year 2000 the event has been hosted by Morocco in Casablanca, in Tunis the 2002, between 6<sup>th</sup> to 12<sup>th</sup> October.

MIA is not only a trade fair, but the opportunity of meeting between the different private promoters, that constitute the social capital of the sector, the intermediate agencies, the cooperation agencies, all of them involved in the objective to upgrade the African private sector, starting with the participants of the leather cluster. With the organisation of a trade fair within the all inclusive event, MIA tries to be the catalyser of the African market, in order to ameliorate the image of the African leather industry, and its promotion abroad, mainly by means of the buyers sellers events, that should boost the relationship normally built through the informal meetings during the exhibition.

In order to support MIA, the ITC promoted the creation of a trans African leather cluster association, named AFLAI, that should group all five African Macro-Regions. During last MIA in Tunis, 2002, for the first time, several organisation of the international cooperation, namely UNIDO, ITC, FAO and CFC have decided to bring together their experiences to set up a common strategy for the African leather sector. Besides them, ASSOMAC, an important association of the private leather sector in Italy, that also organises important trade fairs in Italy (like SIMAC or TANNIN TECH) co-sponsored the event and organised the Italian participation together with the Italian Foreign Trade office (ICE).

#### II) *Resume of MIA Tunis*

Others than the intermediate agencies and cooperation bodies, most of participants to the MIA in Tunis were African entrepreneurs, as it had been also during Casablanca and even before, during Cape Town.

The Leith-motif of the participation has been the basic assumption that Africa holds 15% of world cattle resources, 25% of goats and sheep, but is only contributing to the world leather trade with 3% and 11% of hides and skins, and however its share of world trade is less than 2% of tanned leather, about 2% of some leather products, and reduced to 1% for leather or leather shoe upper footwear. To improve the African quota of market penetration it has been emphasised the need of technical assistance to upgrade the capacity building of the African sector, in terms of product development, quality, skills, free market and design.

**The participation framework to MIA, both from Africa and from other parts of the world, has been strongly focused according to the assumption in base to which an amelioration of the African industry of the sector is envisaged when the ability of exploitation of the local raw material, hides and skins above all, will be grown, and this will possible also because the T.A. agencies facilitate the access to the advanced know how and the intermediate goods, while the same framework is a little less market oriented when considering the participation from the point of view of the consumers market evolution, both for supplies and final products marketing.**

The MIA approach in Tunis was unbalanced toward the T.A. compared to the trading promotion: 3 days for the exhibition, but seven days for the other events, tutored by the organisation, like seminars, buyers and sellers meeting, and the general assembly of AFLAI.

### **Tasks assigned to the participants**

The tasks of the missions of every African participant may be resumed as follows:

- ❑ Participation to a set of meetings with international leather experts, to screen the experiences of development of the African leather sector.
- ❑ Acquiring and discussing proposals related to the technical assistance projects managed by the international agencies of the cooperation.
- ❑ Introduction of new themes for the transfer of know how from the developed world to Africa, for which some T.A. is expected.
- ❑ Set up some formal or informal organisms designed for the follow up of the planning eventually envisaged during the meetings.
- ❑ Participation to the meetings, organised before the trade fair, like one to one meetings between entrepreneurs based on the preliminary identification of needs between the offer and the demand.
- ❑ Participation to the trade fair as exhibitors and/or visitors.

### **Tasks assigned to the T.A. organisms**

The MIA has been organised directly by ITC, like in the past, and it has been facilitated by some allied organisms, like the private group SIC, the agency that has the experience of organising the “Semaine du cuir” in Paris, a former top important leather fair in the world, and other international organisation as depicted before.

### **SIC**

SIC and ITC designed a MOU (Memorandum of Understanding) for the organisation of MIA, that envisages the cooperation between SIC and ITC regarding the promotion and communication, the prospecting and registration of participants, and the logistic of the trade fair including allocation of stands space and customer services during the trade fair.

### **AFLAI**

The first cycle of implementation of the MIA programme, between Cape Town and Addis Ababa (1998-2004), is designed to strengthen sub-regional and trans-African cluster network, creating an agency, recognised by some selected African countries owning a relevant potential in the leather sector, through which it will be possible to consolidate MIA and transfer the programme to the private sector.

**AFLAI has been established by ITC as preferred interface between the cooperation activity and the beneficiaries, that are the SMEs of the private sector. Some meetings of the steering committee of AFLAI have been finalised, and it has been the steering committee of AFLAI that decided to locate next MIA 2004 to Addis Ababa. However a funding schedule that should lead to financial independence of the organisation itself, the improvement of the cooperation between AFLAI and regional/national association, and the transfer of the responsibility of the organisation of MIA from ITC to the African representatives has still missed to be discussed and planned.**

#### **Technical Assistance**

The expertise meeting has been developed between three days, before the start up of the trade fair, and there were discussing about 10 paper presentations regarding marketing themes, industrial policy, trading approach, technology and environmental protection.

The result of the discussion has been resumed by means of a blueprint, that represents a summary of the experiences of support to the leather sector in Africa, assisted by means of the international cooperation.

Box 6 MIA 2002 – Tunis, Experts' meeting, Blueprint recommendations

**Blueprint Recommendations**

- ❑ The Vision is one of optimising production, investment and trade so that the African leather industry will become competitive in the global market.
- ❑ This vision implies the attainment of a number of aims:
- ❑ To substantially reduce the gap between available raw material resources and the products processed and traded from these resources within a market-oriented approach
- ❑ To agree on regional trade initiatives and an approach to trade liberalization
- ❑ To attract FDI by improving the business environment and the transparency of operations
- ❑ To modernize the leather industry components of the African leather supply chain both technically and managerially, and improve the quality of human resources and support institutions
- ❑ To bring a well-defined market oriented approach to the production of footwear and other leather products by Pursuing import substitution
- ❑ Promoting linkages with the global leather supply chain through sub-contracts, partnerships and other alliances,
- ❑ Highlighting Africa's own capacity in design by introducing the "Made in Africa " strategic approach.

The recommendation should have been spread through the stakeholders and the intermediate agencies in order to coordinate the technical assistance and the training programme. Also through the private sector to orient the partnership programmes and the trade activities as follow up of MIA.

The T.A. within the MIA scheme, refers to the project proposal for the "Integrated Leather Sector Expert Development Programme in Africa" (2001-2005), Development Programme, International Cooperation, Objective n° 5: "To enhance the coordination of development efforts among various donor organisations through a broadly agreed, coherent leather sector development framework, continuous information on relevant donor projects and activities, and periodic meetings". The target is to avoid overlapping or duplication of technical assistance activities occurring by the international organisations. For this reason has been designed an appropriate output (output 5.1) named Coordinated Leather Industry Assistance (CLIA). The task is to active organisations/donors in the leather sector in Africa to inform each other's assistance projects and possibilities of coordination in order to achieve the highest possible impact of donor funding.

CLIA has been developed, from the side of ITC, by means of a bulletin describing the technical assistance activities of more than 30 donors in the leather sector.

A bulletin seems not to be sufficient.

**It is important that the relevant information flows currently through the private sector, between the associations and intermediate agencies at national and regional level, taking advantage by the trans-national African cluster organisations.**

It is also important that the communication finds a focal point outside the very specialised club of the external cooperation agencies. A kind of "network" must be set up between the cooperation agencies and the private entrepreneurs through their associations and other intermediate agencies, where existing.

The main emphasis now rests upon the promotion of co-operation between the partner enterprises from the different regional networks. Enterprises will be able to benefit from a wide range of services available from the trans-national network.

As follow up of MIA, every regional partner of the trans-national network should inform regional enterprises of upcoming events and organise their participation. Other African initiatives important to the trans-national network in the leather sector include the Meet in Africa that provides targeted assistance for African international Leather fairs systems.

The trans-national network organisation should also verify whether or not its activities overlap with other Cooperation activities in the field of inter-enterprise T.A. and P.R.

It is not possible to organise such coordination only between external cooperation agencies.

## 4. Focus on the MIA Outputs

### *I) Background*

For more than 20 years ITC has developed significant experiences in the leather sector in DCs, particularly in the area of promotion and marketing. ITC offers assistance on specific trade problems, conducts market studies and participate in international trade fairs related to hides, skins and leather products for networking purposes.

In December 1996 leather industry representatives from 18 African countries and two regional leather trade associations, LLPI of the COMESA countries and ESALIA, signed a resolution requesting ITC to organize a sustainable leather sector African event. ITC responded by taking steps to organize a biennial “Meet in Africa” event, which started in Cape Town in 1998 and which was conceived as the central element of the integrated export development programme for the leather industry in Africa (1996-2005).

The latter integrated programme was aimed at promoting sustainable services within trade support organizations directly supporting the development of the sector.

The overall objective of the integrated export development programme is to assist the hide, skin, leather and leather products sector in Africa; the expected benefits are increased employment and enhanced export earnings. The programme covers the period 1996-2005.

### *II) The Set Up*

#### **Evaluating Cape Town 1998 and Preparing Casablanca 2000**

#### **Sept-1999**

ITC has launched a number of development projects in the leather sector in Africa particularly targeting the area of market, trade and business skills. ITC offered African countries assistance on specific problems and conducted feasibility and related studies on request.

Several constraints stand against development for African leather sector such as low recovery, bad flaying, primitive preservation technique and improper treatment of raw material and, at leather product level, lack of design, product development, marketing skills, export management and training.

The ITC leather unit started a coordinated industry assistance project in 1995. **INT/47/57 – Coordinated Leather Industry Assistance (CLIA) Phase I. Africa.** Its main focus was to aid donors to optimise the use of their investments.

The project was followed by two other projects: the first was **RAF/47/65 - the all Africa Leather convention and trade fair (“Meet in Africa”)**. The other was **RAF/47/66 leather products export development support to selected enterprises in developing countries in Africa**.

The three projects were financed mainly by grants to ITC from the Government of the Netherlands.

### ***Findings:***

There was a great interest for the Meet in Africa event from those met by the mission. African participants expressed the importance of a stronger attendance at the trade fair by buyers and investors from outside Africa. It was essential that more arrangements be made to attract more of them to the second MIA in Casablanca 2000. The creation of AFLAI was a significant result of MIA 1998. The completion of the legal framework of the Federation was assumed as essential for the African leather sector development.

### ***Recommendations:***

There was a real necessity to continue Meet in Africa with all its activity, the advertising campaign for Casablanca 2000 have been focused on attracting more visitors, investors and buyers from outside Africa.

There was a need for the preparation of a national profile by each African country, and ITC envisaged to conduct a study to define the common obstacles that confront intra-African trade and propose measures to deal with it.

Export development for selected enterprises in African countries have considered the following points to enhance its achievements:

- ❑ The increase of the time given to each enterprise during the experts' visits
- ❑ The carry out of studies on particular import markets
- ❑ Contracts for training programmes that would have contained more detailed objectives
- ❑ A points system with chosen parameters and criteria to be prepared for the selection of enterprises to be included in the projects
- ❑ Measures had to be taken to ensure proper dissemination of the skills accumulated by the selected enterprises to the rest of the sector.

A development strategic long-term policy was thought to be designed by ITC with the cooperation of other UN bodies. The strategic plan should have covered the following activities:

- ❑ Training and developing human capabilities;
- ❑ Hides and skins improvement;
- ❑ Enhance production techniques;
- ❑ Developing intra-African and international trade;
- ❑ Further stretching the value added chain by processing the raw material to finished product.

The project plan was outlined according to the above depicted recommendation.

### ***First issue: Coordination of T.A. in the leather industry (Project INT/47/57) - CLIA***

#### **Why coordinated assistance?**

During the MIA events it had been defined that uncoordinated assistance from many sources may lead to duplications. Differences in perspective, approaches and methodologies are detrimental to good development.

### **Project concept:**

To create an ongoing technical capability at ITC to fulfil the following:

- ❑ To monitor the coordinated development of assistance projects
- ❑ To aid donors with information to avoid duplication of efforts
- ❑ To achieve development with the minimum investment and obtain the highest possible efficiency

### **Strategy**

It should keep participating organizations informed about planned and ongoing projects in Africa through the publication and the dissemination of a special bulletin on a regular basis. It should propose useful projects to aid organizations, based on ITC's experience and knowledge (ITC Market News Service is considered a major reliable source for leather market, mainly for raw hides and skins and semi-processed leather).

The strategy of this project is expected to improve international development efforts in support of the export orientation for leather industry in Africa.

ITC will lead to better selection of project to be financed, better selection of the areas, integration of projects, emphasis of the programme approach for long-term development projects.

The project strategy was presented to 38 development institutions and the evaluator was informed that reactions were positive.

### **Implementation:**

Contacting and visiting the organizations concerned, explaining the objectives and requesting their coordination and contribution and ensuring their participation. Creation of the publication "CLIA Africa" on a regular basis.

### **Results:**

A regular ITC publication providing ongoing up-to-date information; formulation of a platform for technical coordination; advice to donors; increased involvement of import agencies; avoidance of duplication and waste of funding resources; expansion of the Market News Service (Leather).

### **Attention to the coordination:**

Comprehensive thinking about using the same approach for other sectors. Bulletins for other continents.

### ***Second issue: The all Africa Leather convention and trade fair "Meet in Africa" (Project RAF747/65)***

#### **Background**

This project was launched as a result to the findings generated by CLIA INT/47/57

The evaluation of potentials of Africa in the leather industry is great, according to FAO statistical information. This increasing trend is expected to continue. To evaluate the potentials of the African contribution to the leather industry worldwide also ITC referred to the following percentages:

Africa share of the total world production:

5% of bovine hides and skins

14% of goat and kid skins

9% of sheep and lamb skins

Africa share of the world trade:

less than 2% in raw hides and skins

2% for leather and leather products

less than 1% for leather footwear and footwear with leather uppers.

This fact led to the next question: why is the African leather sector not fully utilizing its natural resources and could it be further developed?

### **Project formulation**

In 1996 ITC was requested by key African leather producing countries to organize a regional event, as reported above in the background chapter, with multi activities: to establish a common vision, create awareness, identify problems that hinder intra-regional trade and export development, presenting Africa to international markets and attract buyers/visitors from other continents.

ITC responded by taking steps for the creation of a biennial event, Meet in Africa, and formulated an integrated export development programme for the leather industry in Africa.

The main funding of the project was provided by CBI, Netherlands.

**The first MIA took place in Cape Town in 1998, at this stage the second had been scheduled in Casablanca**

### **Objectives and project design (Cape Town 1998 and Casablanca 2000)**

- ❑ Increase the image of Africa and present the leather and leather products to the international markets
- ❑ Foundation of the first pan-African leather federation
- ❑ Tackling the technical and commercial problems that delay the mechanism of development of the industry
- ❑ Initiate a strategy for future African development.

The event was organised open to all countries and sectors of the African leather trade and industry.

The most important aim was to improve commercial ties, export capabilities, provide an opportunity for traders, importers etc.

### **Activities**

The activities to achieve the main project objectives were:

- ❑ conference
- ❑ trade fair
- ❑ training
- ❑ buyers/sellers meetings
- ❑ seminars and workshops
- ❑ factory visits

### **Project Implementation: First meeting Cape Town 1998**

ITC as the responsible body for organizing and promoting the event took the following steps:

funding arrangements (the main funding was provided by CBI, Netherlands). There were 20 other organizations that supported and/or contributed to the event. Among them SIC (France) undertook the responsibility of promotion and the trade fair arrangements with ITC.

Execution performance (the event was held in Cape Town, in November 1998).

Two days conference (during the conference some African attending to the meeting decided to create AFLAI; they defined its main objectives as follows: a. facilitate access to technology and market; b. organize trade fairs; c. advocate joint ventures; d. advocate and facilitate continuous learning and upgrading market skills; e. considering globalisation environment market mechanism; f. pollution control; g. dealing with elements that confront intra-African trade and export to the international market).

Three days seminars (seminars covered a range of topics which were presented by a group of experts).  
Three days fair: activities undertaken to manage the process were mainly the following: contracting with subcontractors SIC and Global Conference Ltd; press conference, publicity stands, editorial coverage; continuous contact with participants; monitoring selection of seminar subjects and choosing specialized experts.

- Two day buyers/sellers meetings
- One day factory visits.

### **Project results**

193 exhibiting companies, around 1000 participants from 58 countries, attendance to the seminars, workshops, buyer/seller meetings and conference was significant.

### **Outputs**

- ❑ Creation of an all Africa leather industry federation (AFLAI)
- ❑ improving the image of the African leather industry
- ❑ it was the first time that such a number of African representatives gathered in one event
- ❑ about 195 African and non-African companies exhibited in the trade fair
- ❑ creation of business contacts and contracts
- ❑ common and coordinated African training strategies and programmes

### **Identified weak points**

Some weak points had been underlined:

- 1) attendance from Europe and South-East Asia was poor;
- 2) promotion campaign too concentrated on African countries;
- 3) present duration of the event too long (8 days);
- 4) buyer/seller meetings did not achieve sufficient immediate results.

### **Achievements**

There was a real necessity to continue MIA in order to keep the momentum alive and accumulate the results.

ITC should have conducted a study to define the common obstacles that confront intra-African trade. ITC envisaged to design a project to identify particular import markets besides information about needs conditions, style and specification accepted in these markets.

ITC should have concentrated more on attracting non-African participants.

It had been recommended that promotional materials clearly offered each participant the possibility of fixing his own programme from multiple choice menu.

## **Lessons learned**

**Comprehensive coordination between donors, contributing organizations and beneficiaries yield positive results.**

**Concentration of activities under one event accelerates development opportunities.**

**The programme approach is the basis for successful development through integrated projects.**

**Creation of awareness is an important element for development.**

## **III) The Follow Up: After Casablanca**

### **Year 2001, Comment about Casablanca MIA 2000**

The second “Meet in Africa” was held in Casablanca from 25 September to 2 October 2000 and saw a growing participation of African and non-African enterprises.

The total 10.000 square m. was filled by a total of 356 companies from 38 different countries. Close to 2000 visitors from all over the world were registered plus many visitors who entered without registration.

Breakdown of exhibitors: 123 Moroccan companies, 128 African companies, 1054 international companies. Most of them where from Morocco, Tunisia, Eritrea, Ethiopia, South Africa, Egypt, Portugal, Spain, Italy, France.

The national pavilions were represented as follows:

- Tunisia for raw material and finished products
- Eritrea for raw material and finished leather
- Italy for machinery
- Spain for raw material and components
- Portugal and Greece for accessories and components

Visitors: 1746 visitors.

### **Updating the outline of the project plan**

The world footwear and leather products sector was moving from high-cost industrialized countries to developing countries, but only a limited number of African companies have developed the capacity to produce finished products. Lack of management, marketing and technical skills have constrained the development of the leather industry. The export potential of the sector was still suffering from lack of long term products and market development strategy on the part of producers, lack of trade support services and development facilities. Unawareness on the part of importers with respect to sourcing African opportunities was also a major constraint. The top international trade fairs took place in Europe (Bologna), Asia (Hong Kong) and America (Miami), there was a need to establish an event for Africa : MIA which had now been held in 1998 and 2000. The necessary steps would have followed to gradually make Meet in Africa trade fair a sustainable event on a commercial basis.

### ***Programme strategy at enterprise, national and regional level***

The programme depicted above had been designed to facilitate the intra-African and international trade expansion opportunities on a permanent and sustainable basis. The integrated export development programme has been implemented starting from 2001 up to 2005, and it is focused specifically on African countries and all sectors of the leather trade and industry. The mix of programme elements depends on specific circumstances to be determined by needs analysis and discussions with country officials and other partners ( AFLAI).

It is involving ITC services currently in place (area marketing) and expertise in functional areas and in training geared to leather sector development needs.

The envisaged achievement were:

1. Creating awareness of existing trade opportunities (trade fair like Meet in Africa)
2. Enhancing the image of African leather
3. Increasing competitiveness at enterprise level (improvement of skills, transfer of know-how and technology, joint ventures)
4. Strengthening associations and training centres at regional and national level
5. Creation of a networking mechanism and trade information system
6. Enhancing international coordination of the cooperation activities

### ***Beneficiaries and partners involved***

Since that time, like today, the programme is open to all countries and sectors of the African leather trade and industry.

#### *Private sector manufacturing enterprises:*

The main direct beneficiaries of the project are the private sector enterprises, particularly SMEs.

#### *Service providers.*

The trade fair part of MIA is targeted to, in addition to manufacturers and exporters, provide an opportunity for traders, importers and potential investors.

#### *Institutional representatives.*

Training institutions, leather research institutions, national and regional institutions, international donors organizations and government representatives: through the Meet in Africa event they may coordinate their interests.

### ***Development objective***

Integrated export development programme for Africa: the overall goal is sustainable economic growth and social development.

### **Immediate objectives, outputs and activities**

The objectives, outputs and tasks had to be updated and outlined as reported in the intermediate memorandum or interim progress reports.

## **At Regional Level:**

### ***Objective 1: to boost intra-African trade and Africa exports to international markets***

Envisaged performance indicators:

- a) *throughout the programme (1996-2005) at least 300-440 African enterprises, mainly SMEs and participant to MLA event, will directly benefit by increasing their production and marketing skills (at least 20-40 new trade contacts for each)*
- b) *new annual trade transactions at regional and international levels*
- c) *3000 to 4000 buyers of African products will have gained a wide knowledge of the offer in the leather sector*

### ***Output 1.1 Meet in Africa 2002 and 2004***

An effective forum for participants in the leather sector. Project activities include trade fair, AFLAI conference, seminars, training sessions, workshops, buyers/sellers and joint ventures meeting, fashion shows and factory visits.

#### **Activity 1.1 (years 2001-2002, 2003-2004)**

Undertake the organisation of MIA 2002 (in cooperation with SIC). This activity is estimated to cost approximately US\$ 1.0 – 1.5 million per event, and special fundraising efforts have started to secure MIA 2002. The event will be gradually taken over by AFLAI, created during the first MIA in 1998. The first two events in Cape Town and Casablanca generated an income from the sale of stands and application fees which has been set aside in a revolving fund for future MIA events. The revolving fund has at present a positive balance of about US\$ 150,000

Output 1.2 Internet site of African hides, skins, leather and leather products manufacturers and exporters (year 2000 and onwards)

This site is fully operational

#### **Activity 1.2 (2001-2005)**

Follow up and updating – mailing of questionnaires to African enterprises in order to continue collecting and updating the relevant data for the website

Output 1.3 Internet site of importers of finished leather products (year 2001 and onwards)

#### **Activity 1.3 (2001 onwards)**

- Create the website
- Undertake the research and collection of information
- Draft and mail questionnaires to potential buyers
- Process the information onto the website

### ***Output 1.4 Production by AFLAI of an African Leather magazine (year 2002 and onwards)***

#### **Activity 1.4 (2002 – onwards)**

Consultancy services to AFLAI for a co-production between AFLAI and a commercial publishing house.

### ***Output 1.5 (year 2001) Articles published in the global leather trade press on the direct and indirect impact of MIA***

#### **Activity 1.5 (year 2001)**

Specialized leather specialists to provide feed-back on the direct and indirect impact of MIA events on the African industry and trade.

## **At National / Regional Level**

***Objective 2: To build and strengthen the capacity of institutions, particularly leather trade associations and training centres***

Performance indicator: 80% to 90% of African national and regional associations, training centres and other institutions would have a clear insight into the present status, common problems, possibility of trade cooperation.

### ***Output 2.1 (2001-2002)***

A report considering the actual situation and needs, formulation and establishment of development strategies. The study will also include:

- a. a list of intra African barriers in the leather sector
- b. promotion of joint ventures and technology transfer
- c. training exchange programme

### **Activity 2.1 (2001-2002)**

Consultancy services in cooperation with AFLAI for the preparation of a sustainable development programme.

### ***Output 2.2 (2002-2003)***

African leather industry representatives (from more than African 20 countries) trained in providing support to the African leather industry.

### **Activity 2.2**

Programme to be designed in cooperation with national trade support institutions and with relevant organizations (UNIDO, AFLAI, ESALIA, LLPI, FAO, ASSOMAC, PISIE, etc) and three regional seminars to be organized for the industry representatives.

### ***Output 2.3 (2001-2005)***

Five national and two regional leather associations would have been created and the existing ones strengthened. AFLAI, with ITC support, becomes an active operational body.

### **Activity 2.3 (2001-2005)**

AFLAI, with some ITC assistance, will undertake a study on the current situation and needs of creation of a national and regional associations. ITC maintains continuous cooperation, coordination with AFLAI, supplies secretarial and logistical support, partial funding of AFLAI steering committee meetings. A funding schedule that should led to financial independence of its members, and review AFLAI's involvement and responsibility in the organization of the third MIA.

### ***Output 2.4***

Translation of training material and publications.

### **Activity 2.4**

Undertake the translation of training material and publications.

## **At Enterprise Level**

### ***Objective 3: To enhance the competitiveness of leather sector enterprises (particularly SMEs)***

Performance indicator: over the duration of a seven-years period, ten enterprises per year would have increased their exports by 5-10% annually.

#### **Output 3.1 (2002-2005)**

Ten leather product manufacturing companies in four African countries with a demand driven adapted and further developed product line. In the four countries concerned, national leather goods industries and trade associations involved in and benefiting from the project.

#### **Activity 3.1**

Training activity and direct technical assistance to enterprises. Investigate export potential, improve marketing and management skills.

#### **Output 3.2 Hide and skin recovery (2002)**

Improved collection systems with better quality raw material through better flaying, curing and grading practices.

#### **Activity 3.2 (2003)**

Consultancy services possibly in cooperation with FAO to increase the recovery and commercialisation of hides and skins.

### ***Objective 4: To establish a regional networking mechanism***

#### **Performance indicator**

At the end of the long-term Integrated Programme at least 50 to 70% of African enterprises would use successfully the networking information system.

#### ***Output 4.1 (2002-2005)***

An operational regional networking system.

#### **Activity 4.1**

Consultancy services for the design and setting up of a regional networking system. This could be a part of the MIA programme to be coordinated by AFLAI.

## **International cooperation**

### ***Objective 5.***

To enhance the coordination of development efforts among various donors organizations.

### ***Performance indicator***

No more overlapping or duplication of technical assistance activities occurring by the international organizations active in the leather sector in Africa.

### ***Output 5.1 (ongoing)***

Coordinated Leather Industry Assistance (CLIA)

Active organizations/donors informed on each other's assistance/support activities and possibilities of coordination.

### ***Activity 5.1 (ongoing)***

Continuation of the CLIA production and publication. CLIA will be in the future a biannual ITC bulletin describing the technical assistance activities of more than 30 donors organizations. ITC will also provide, on request, advice to donors on prospective activities to help optimise overall donor inputs.

## ***IV) Feed Back***

According to the reports of ITC dated 13<sup>th</sup> July 2001 related to the organisation of the MIA 2002 the above depicted outputs and activities were in progress as follows and mostly matched the objectives, as ITC reports:

### **Output / Activity 1.1 Meet in Africa 2002**

**An agreement was reached with AFLAI regarding the dates of the event (October 6-13), the location (Tunisia) and the programme of the activities (October 6-8 – Seminars; October 9 – buyers/sellers and joint venture meetings; October 10-12 – trade fair; October 13 – factory visits/excursions)**

Trade Fair: ITC visited the Expo Center in February 2001, has analysed the offer made by the Expo Center and prepared the Terms of Reference for the negotiation.

Seminars: In the course of August-September ITC will prepare the Terms of Reference for the tender to take place for sub-contracting the services of a local organizer.

Substantial progress has been made regarding the Programme of the presentations/lecturers to be presented as contributions from UNIDO/PISIE sponsored and financed by ICE and from ASSOMAC. ITC will advance and finalize the Seminar programme.

SIC: cooperation agreement was elaborated and signed between SIC and ITC for MIA 2002, with again extra-budgetarial contribution of USD 150,000 from SIC to cover the international promotional campaign and the technical stand building at the fair.

Donors: consultations with a number of official supporters and donors of MIA 1998 and MIA 200 are underway on the possibilities of renewing cooperation.

Data Base: updating the existing mailing list and setting up of an improved data base and registration system of participants is underway at ITC.

A MIA 2002 project document was prepared and a first provisional budget for MIA 2002 was made.

### **Output /Activities 1.2 Internet site of African hides, skins leather and leather product manufacturers and exporters.**

The site is fully operational and show company/product profiles. Follow-up and updating continues on a regular basis.

### **Output / Activities 1.3 – Internet site of importers of finished leather products**

A project document idea was formulated, a job description for contracting an expert was elaborated.

### **Output /Activity 1.4 Production by AFLAI of an African Leather Magazine**

Coordination continues with AFLAI, a potential publishing house has been identified; offers were received from different international leather magazines (under study for approval by AFLAI).

### **Output / Activity 1.5 Articles published in the global leather trade press**

Articles were published in the global trade press providing feedback on the direct and indirect impact of MIA 2000.

## **National level / Regional level**

Objective 2 – To build and strengthen the capacity of institutions directly involved in the sector at national and regional levels particularly leather trade associations and training centres

### **Output / Activity 2.1 A report considering the actual situation and needs for technical assistance**

Confirmation for financial support to AFLAI is expected from ASSOMAC/ICE/Italian Ministry for Foreign Affairs to the amount of USD 80,000 for a mission of experts in Africa ( actual situation, needs for technical assistance, policy analysis). ITC was requested to serve as coordinator of the project.

### **Output / Activity 2.3 Support to professional leather associations in Africa**

ITC maintains permanent cooperation, coordination and consultation with AFLAI and supply, whenever possible, technical assistance / monitoring to the Federation.

## **Enterprise Level**

Objective 3: To enhance the competitiveness of leather sector enterprises

### **Output /Activity 3. 1 Impact of the integrated leather development programme**

1. ITC undertakes fundraising activities for capacity building and training associations in institutional support and direct technical assistance to enterprises.
2. ITC is now coordinating/studying the possibilities of organizing workshops on “ Marketing of Leather and Leather Products” to take place possibly at the end of 2002. CBI would fund the experts’ fees and travel expenses. ITC expects answers from UNIDO and ESALIA as far as contributing to the local organizational expenses.

### **Output / Activity 3.2 Hides and skins recovery**

1. Activity scheduled to take place from 2003, ITC undertook fundraising activities with FAO/CFC/IFAD for preparing a study on the actual situation.
2. ITC presented the idea at the Seventh Session Meeting at FAO in Rome, June 4-6, 2001. ITC elaborated a Project Summary entitled “Hides and skins: support to export development in Africa – Increase of export availability and improvement of market and marketing skills” which, following ITC internal approval, will be sent to FAO/CFC, IFAD and other potential donors.

**Objective 4 : to establish a regional networking mechanism ensuring a continuous exchange of trade information for the African leather sector**

### **Output /Activity 4. 1: An operational networking system**

Scheduled for 2002, but considered already to be included in the Global ITC leather Website currently under study by the ITC web committee.

### **International Cooperation**

**Objective 5: To enhance the coordination of development efforts among various donors organizations**

### **Output /Activity 5 .1 Coordinated Leather Industry Assistance (CLIA)**

1. Next CLIA for Africa ( a biannual bulletin): envisaged publishing edition in July 2001.
2. ITC has undertaken fundraising for seed funding with the view to expand the project for Latin America and Asia.

### **Problems encountered**

No major problems have been encountered to date.

### **Prospects and future programme**

#### **Regional level – Objective 1**

#### **Output /Activity 1.1 Meet in Africa 2002**

1. Actions undertaken in accordance with the established MIA 2002 work plan (seminar topics, speakers and venues; sub-contracting the services of a local organizer; negotiation of an ITC/Expo Centre contract; MIA 2002 budget).
2. continued implementation of agreement signed and elaborated work plans with involved partners for the international promoting campaign
3. collection of on-line subscription with periodic evaluation of the MIA web page
4. renewed cooperation agreements with donors and official supporters

#### **Output /Activity 1.2 Internet site of African hides, skins....**

Continued updating of the Internet site, collecting data provided by the exporting enterprises and processing this data on the Website.

### **Output / Activity 1.3 – Internet site of importers of finished leather products**

Internal approval of the ITC Global Interactive Leather Website, progress in the contracting of an expert and start up of the Web site.

### **Output / Activity 1.4 production by AFLAI of an African leather magazine**

Consultancy services provided to AFLAI will continue to the identification of a publishing house for a co-production.

## **National level / regional level**

### *Objective 2*

#### **Output / Activity 2.1 A report considering the actual situation and needs for technical assistance**

1. confirmation of financial support to AFLAI from ASSOMAC/ICE/Italian Ministry for Foreign Affairs to the amount of USD 80,000
2. Continued progress for a mission of experts to Africa towards the end of 2001 to conduct a study on the actual situation and needs. This study will include: a list of intra-African trade barriers in the leather sector; promotion of joint ventures and technology transfer; training exchange programme.

#### **Output / Activity 2.3 Support to professional leather associations in Africa**

Continued cooperation, coordination and consultation with the AFLAI so as to ensure that AFLAI becomes an active operational body.

## **Enterprise Level**

### *Objective 3*

#### **Output/Activity 3.1 Impact of the Integrated Leather development Programme**

Confirmation from UNIDO and ESALIA concerning the local organizational expenses for a series of workshops (end of 2002). Continued progress in the organization of these workshops with CBI/UNIDO/AFLAI/ESALIA.

#### **Output / Activity 3.2 Hide and skin recovery**

Seed funding for the study on the actual situation and needs. Continued efforts for the design of a project for the improvement of the recovery of hides and skins.

#### *Objective 4*

##### **Output / Activity 4.1 An operational networking system**

Design and setting up of a regional networking system, establishment of the Global ITC's leather Website.

#### **International Cooperation**

#### *Objective 5*

##### **Output / Activity 5.1 Coordinated Leather Industry Assistance (CLIA)**

Publication of the 2001 issues . Seed funding necessary to expand the CLIA project to Latin America and Asia, continued development.

### ***V) Status of Outputs of the Designed Project Plan (Before MIA 2002)***

The preliminary organisation of MIA 2002 was ready according to the final reporting of the period January- December 2001

- A. In this first year of the 5-year project the activities unfolded along the lines established in the project document. Apart from the progress in the organization of Meet in Africa-MIA 2002, special attention was placed in institutional strengthening.
- B. The organization and promotion of MIA 2002 continued to be at the forefront of the activities. UNIDO has offered to sponsor and prepare an Expert Group Meeting to enrich the capacity building sessions at MIA 2002.

#### **Output 1.1: Meet in Africa**

The coordination mechanisms have been established and a work plan developed with AFLAI and SIC. Venue, dates and programme activities were agreed upon with the concerned entities in the host country and with AFLAI. Tunisia will host the event from 6 to 13 October and the programme will cover seminars (6-8 October), buyer/seller and joint ventures meetings (9 October), trade fair (10-12 October) and factory visits (13 October).

Cooperation arrangements have been developed with ITC partners namely UNIDO and PISIE regarding the promotion of the event and the programme of seminars.

Output 1.2 Internet site on African producers and exporters of hides, skins leather and leather products.

The site is fully operational. Collection of data continued for both database updating and expansion through mailed questionnaires as well as through direct contact with enterprises. The site is used for promoting MIA 2002 and for electronic pre-booking by potential participants. A link has been established with ESALIA web site and with the related online services.

### **Output 1.3 Internet site on importers of finished leather products**

The macro architecture of this web site was designed and a first model/prototype was developed by an external consultant.

### **Output 1.5 Articles published in the specialized leather press on Meet in Africa**

Articles on the direct and indirect impact of MIA 2000 were published in the sector trade press, with a worldwide distribution.

### **Output 2.1 Assessment of actual situation and needs for technical assistance and design of development strategies**

A field survey in ten African countries was conducted with the objective of preparing a comprehensive report of the actual situation especially with reference to trade barriers, quality control, joint venture/technology transfer and training exchange potential. The countries visited (equally divided between Francophone and Anglophone areas) are: Benin, Cameroon, Côte d'Ivoire, Eritrea, Ethiopia, Kenya, Mali, Nigeria, South Africa and Tunisia. In addition feedback from the industry on previous MIA events was collected for orienting the organisation of future events.

### **Output 2.3 Support to professional leather association in Africa**

Permanent cooperation, coordination and consultation mechanisms were maintained with the African leather associations and especially with AFLAI, to help the Federation to progressively assume responsibility for the organization of MIA, with a view to the future sustainability of the event.

### **Output 5.1 Coordinated Leather Industry Assistance CLIA**

ITC continued to gather information on technical cooperation projects underway in Africa as well as on new proposals for assistance and development strategies. Information are available on Internet and distributed to about fifty relevant donor organizations, national import promotion offices and technical cooperation agencies participating to CLIA scheme.

## **Status of Objectives**

The activities touched upon all immediate objectives, except objectives 3 (Regional trade information networking) and 4 (Enterprise Level), planned in the ProDoc to start as of 2002, whose activities are subjected to the availability of resources.

It will be possible to fully measure the results of the objective 1 (Boost intra African trade and exports to international markets) as an aftermath of the MIA event in October 2002. Anyhow, the project is moving steadily in that direction, through the promotion of the trade fair MIA 2002 and with the development of the websites.

Substantive progress can be recorded for the objective 2 (Institutional strengthening): AFLAI outreach was strengthened and the project fostered the creation of professional associations at sub-regional level.

Finally, a close cooperation was maintained with potential partner agencies (UNIDO). Other common initiatives are being proposed with FAO and CFC. CLIA bulletin was disseminated and made available on the leather-specific ITC web page.

## **Problems encountered and lessons learned**

As a whole the project progressed as originally planned without major problems or deviations.

In spite of the substantive progress AFLAI is not yet in a position to take over major responsibility for organizing MIA.

## **Prospects**

The project is expected to evolve in 2002 according to the original ProDoc. Activities and existing resources will concentrate on MIA 2002 and focus especially on objective 1 and 2

***On June 2002 the set up of MIA Tunis was quite completed.***

The activity of the period under review was focused on the organisation of Meet in Africa (MIA 2002), Tunis, to be held between the 6<sup>th</sup> to the 13<sup>th</sup> October 2002.

The ITC report assumes that:

- ❑ The new and distinctive feature is the organisation of an Expert Group Meeting within the context of MIA. The CFC, FAO, UNIDO and ASSOMAC have been cooperating with ITC in preparing the Expert Group Meeting and in providing complementary funding. The expected output of the expert group meeting will be a blueprint on the major constraints, possible solutions and the development actions needed to develop the leather industry in Africa with the assistance of all stakeholders, namely governments, private sectors, donors and the UN system.
- ❑ The combined ITC – ASSOMAC report on technical assistance needs and development strategies at national and regional level is underway and it will be presented during the General Assembly of AFLAI at MIA
- ❑ The cooperation with the group SIC of Paris has developed as planned in relation to management of logistics as well as to promotion
- ❑ The tender with the local organizer has been finalized and coordination mechanisms are in place to implement and monitor MIA preparation.
- ❑ Cooperation with AFLAI is in place and ongoing.
- ❑ ITC has been interfacing at the local level in Tunisia with the National Coordinating Committee for MIA, which encompasses representation from both the industry and the public sector.
- ❑ As part of the project activities non directly related to MIA, the following have been carried out:
  1. The internet site of African hides, skins, leather and leather products manufacturers and exporters is updated on a regular basis.
  2. Progress has been made on the new comprehensive international leather website.
  3. The Coordinated Leather Industry Assistance – CLIA list of technical assistance activities has been updated.

**So far the project implementation was proceeding as planned. MIA 2002 could be considered well on track**

Again on 8 March 2002, according to the project document:

The project activities will focus during the year on the organization of MIA, Tunis 6-13 October 2002. The project resources in 2002 will therefore concentrate on the event itself. The activities will be geared to the production of the following outputs under that objective

- 1.1 Meet in Africa (in cooperation with SIC and AFLAI), and new partners like UNIDO, ASSOMAC (with some financing from ICE). ITC will ensure the overall coordination of the partners.
- 1.2 Internet site of Africa hides, skins leather and leather products manufacturers and exporters.
- 1.3 Internet site of importers of finished products.

In view of the future African sustainability of MIA itself, the project will also work to build and strengthen the capacity of institutions directly involved in the sector at national and regional level with the following outputs activities:

- 2.1 Report on technical assistance needs and development strategies at national and regional level.
- 2.2 Support to professional leather associations in Africa (permanent networking, coordination and consultation mechanism will be strengthened within the African leather associations).

**Finally the project will continue to maintain and update the Coordinated Leather Industry Assistance – CLIA list of technical activities of more than 40 donor organizations in the leather sector and make it available on Internet.**

## **VI) Output: Mia 2002 Tunis**

On November 2002, the 11<sup>th</sup> Project “Integrated Leather Sector Export Development Programme for Africa (2001-2005)” has achieved a further step, after a successful meeting in Tunis.

The new step has started on January 2003 (3<sup>rd</sup> and 4<sup>th</sup> project years) with the experimented allied Cooperating Organisations. First of all the African Federation of leather and Allied Industries (AFLAI), possibly also some regional and national Leather Associations.

The Executing Agency has been confirmed: International Trade Center UNCTAD/WTO (ITC)

The actual Progress Report depicts the following scenario:

As stated in the project document, the activities of the year focused on the organization of MIA 2002 in cooperation with AFLAI and the group SIC of Paris. The event took place in Tunis from 6 to 13 October 2002. In spite of the international economic recession we had:

367 registered exhibitors from 38 countries

2201 professional visitors

260 companies at the buyer/seller meetings with about 480 bilateral consultations

over 300 participants in the Seminars and Expert Group Meeting.

Exhibited products at the fair included high quality finished and semi-finished leathers, added-value leather products and a presentation of machines and components. The General Assembly of AFLAI provided the opportunity to participants to report on their activities. Various topics were covered during the Assembly such as the African situation with regard to globalisation, professional training, facilities of intra-African communications, and the establishment of a strategic plan for the development of the leather sector by country and sub-region.

Seminars were held on subjects related to managerial and technical skills development, with particular emphasis on the Tunisian experience.

The Expert Group Meeting, jointly organised by ITC, CFC, FAO and UNIDO was a distinctive feature of MIA 2002: leather experts from the business sector of twenty-five African countries discussed the findings and recommendations for action presented by nine international consultants, as a results of field research.

A blueprint encompassing the conclusions of the meeting is being produced on the major constraint, possible solutions and development actions needed to develop the leather industry in Africa, with the assistance of all stakeholders, namely governments, private sector, donors and UN system.

A special device called SSF (Static Flaying Frame) has been presented during MIA. This innovative, simple and non-expensive system of flaying can have a major impact on improving the quality of hides and skins produced at rural level.

The results of Meet in Africa 2002 will be analysed in the remaining part of the year, while preparation and programming for the next 2004 event is already under way.

#### WORK PROGRAMME 2003-2004.

The major component of the project will be the organisation of the fourth Meet in Africa (MIA 2004) which is tentatively planned to take place in Addis Ababa, Ethiopia, in the last quarter of 2004. The confirmation of Addis Ababa is subject to a number of check, currently under way, concerning the availability of adequate infrastructures, facilities and government support for hosting the event. The Mia structure applied to date will continue in 2004 (trade fair, buyer-seller meetings, joint venture consultations and capacity buildings events). The duration might be reduced to five days in order to proportionally reduce some cost factors. The major challenge for the project will be to create the conditions to make MIA a self-sustainable event.

Focus on:

**Objective 1 : to boost intra-African and African exports to international markets**

**Objective 2 : to build and strengthen the capacity of institutions directly involved in the sector at national and regional level.**

The project will then continue to support the establishment of networking, coordination and consultation mechanisms within African associations at sub-regional and national level with AFLAI playing a central unifying role. Capacity building activities will be geared to develop AFLAI competence to progressively take over specific functions in the organisation of MIA.

### ***VII) Next Improvement: MIA 2004 Addis Ababa***

The “Integrated leather export development programme for Africa (2001-2005)” will continue with next final, according the current cycle, event financed by the Government of Netherlands, that will be hosted by Ethiopia in Addis Ababa next 2004.

Progress made and key facts

#### **Programme for Meet in Africa 2004**

ITC activities in the leather sector, according to the project document for 2003, focused on the organization and promotion of MIA 2004. MIA will be organized in cooperation with SIC SA and AFLAI. Location and programme of activities were decided by African entrepreneurs during AFLAI general Assembly held in Tunis in the context of MIA 2002, dates were decided during an AFLAI Committee meeting at Lineapelle – Bologna, May 2003: according with those decisions MIA 2004 event will take place in Addis Ababa – Ethiopia, between 6-9 October 2004 and it will be focused on direct business development. The programme will include: 6 October, AFLAI General Assembly; 7-8-9 October Trade Fair including buyers-sellers and Partnership meetings.

Development of partnership for MIA 2004

## **1. SIC SA**

A partnership agreement was signed between ITC and SIC SA of Paris, who has been the main ITC partner for the organisation of MIA events since its creation in 1998.

The major cooperation activities included:

1. communication and promotion
2. prospection of participants (exhibitors and visitors)
3. registration of participants (exhibitors and visitors)
4. Logistics of the trade (stands allocation, customers services etc.)

### **Promotion**

ITC/SIC / AFLAI were present at promotional stands and distribution of press releases at Bologna – Lineapelle (5-7 May 2003, 28-30 October 2003), Le cuir à Paris, (17-19 October 2003).

The new image for MIA 2004 is under finalization.

## **2. AFLAI**

Cooperation with AFLAI and the AFLAI Executive Committee Members is in place for mobilizing and coordinating African response and participation from all African sub-regions.

### **Local partners**

The terms of reference concerning the venue for the trade fair, buyers/sellers meetings and AFLAI General Assembly have been prepared and preliminary discussions with local counterparts have taken place. The UNECA building has been opted as the venue for the whole event. Support at all governmental levels to the event has been promised by Mr Fantaye Biftu and Mr Girma Birru, of the Minister of Trade and Industry. A new association representing the leather sector has been created: E.T.F.S.G.M.A. (Ethiopian Tanners, Footwear and Leather Garments Manufacturing Association). It's important to note that Ethiopia is country member of ESALIA, a fact which assures the coordination of participating members countries at MIA 2004.

### **NCC (National Coordinating Committee)**

Created also in August 2003, it groups together the leather sector professionals and all institutions and ministries implied in the organisation of MIA.

### **UNECA**

Mechanisms of cooperation, coordination and consultation were established with UNECA for what refers to the preparation of the terms of reference for renting the venue and securing logistic and conference service from local providers.

### **UNDP / UNIDO**

The two organisations have manifested their utmost interest in cooperating for the successful result of MIA 2004.

### **CDE – PRO-INVEST**

With the objective of strengthening the institutional capacity of AFLAI and of the Africa sub-regional and national associations ITC has proposed that CDE-PROINVEST programme be in charge of the organisation of a capacity building workshop in the context of MIA 2004. The project is currently under consideration in Brussels.

## Other project activities

While Meet in Africa will continue to be the pivotal axis of the project, the institutional strengthening is considered to be an essential support element, particularly in view of the future sustainability of AFLAI and MIA itself. The results of the independent evaluation being carried out at present will provide useful elements for the future AFLAI strategy. Meanwhile in order to maintain a high level of cohesion and communication within AFLAI, ASSOMAC has accepted to continue sponsoring the biannual meetings of the AFLAI Executive Committee Members in Bologna.

The leather-specific website “Leatherline” ([www.intracen.org/leatherline](http://www.intracen.org/leatherline)) has been completed. The website is an additional support element, it is already operational and its public release is planned for the coming days. A promotion campaign will follow shortly.

## Problem encountered

So far the project is proceeding as planned.

## Prospects

MIA 2004 can be considered well on track, and it is reasonable to expect an event matching the success of the previous ones.

Expenditure situation

It is estimated that all allocated funds will be spent by the end of December 2003.

## ***VIII) Immediate Objectives Achieved***

### **Findings**

The trend of the MIA project has been positive, year after year: in Cape Town in 1998, the first MIA event saw around 1000 participants from 58 countries worldwide, mainly from Africa, with 193 exhibitors, 1500 consultations in the buyers/sellers meetings.

The linkage between MIA and the international cooperation environment has been positive since the beginning, when about 20 international agencies have been involved and gave their support to the event. The event has been implemented on the base of a common declaration of intents signed between the Leather and Leather Products Institution (LLPI) of the COMESA countries, and ESALIA. Main sponsor was since then CBI, and co organiser the SIC. On the side of the host country, the Leather Industry Research Institute (LIRI) was involved between the other supporting organisations.

The second event in Casablanca, Morocco, year 2000, received about 2000 participants, 356 exhibitors from 38 different countries, more than 2/3<sup>rd</sup> from Africa, 750 consultations between buyers and sellers within the formal meetings registered by the secretariat. At this stage the linkage with the private sector tried to be more operative, since the fair was organised in partnership not only with SIC, but also with the support of FEDIC, the Morocco Leather Federation and the Morocco Export Promotion Centre (CMPE), as well as the new trans-African leather association (AFLAI) had been activated and was actively operating by means of a steering committee including the members of nearly all participating countries.

The promotional activities had been enforced, with the agreement between AFLAI and the leather magazine “Africa Leather” and the set up of an AFLAI website. Another sector cluster organisation

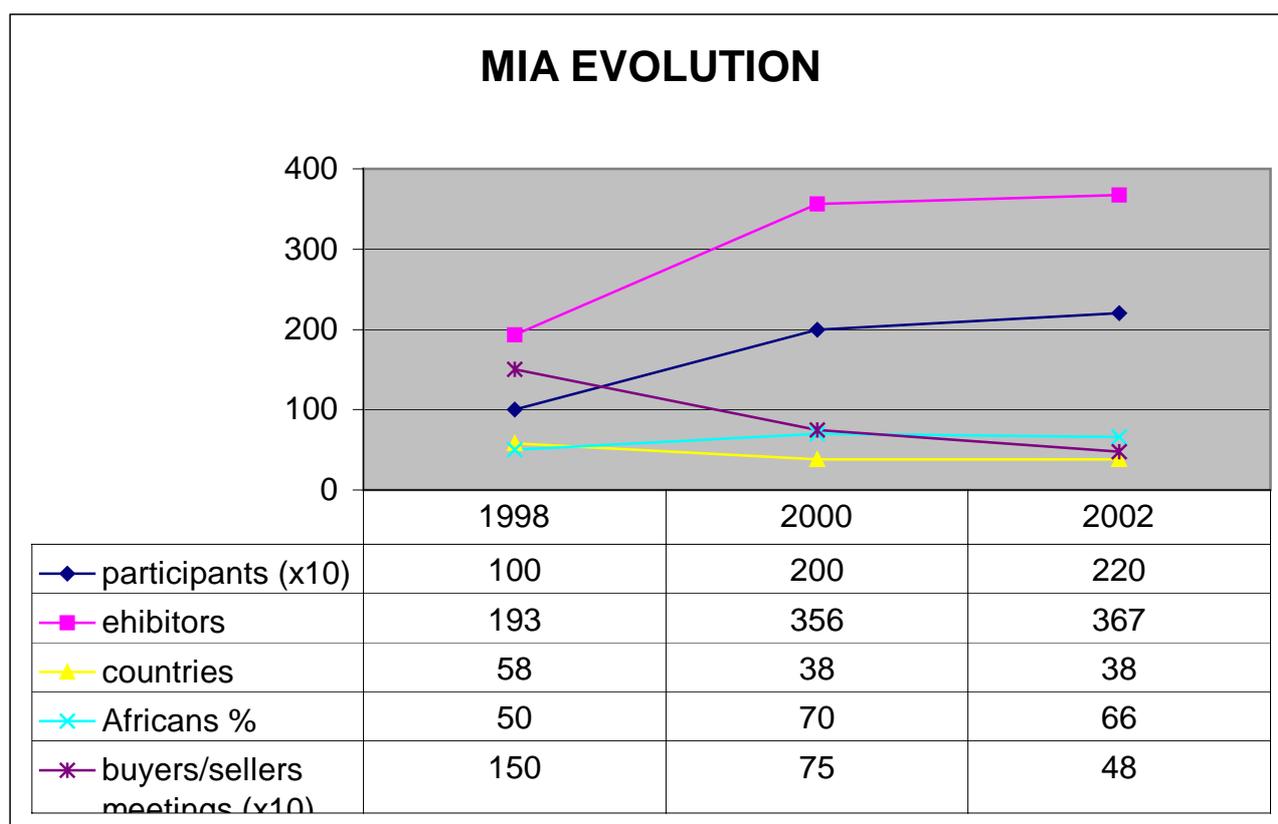
grouping several associations was implemented on the model of AFLAI, but for the West Africa sub Region (ASR-PCP-DAO).

With the MIA event in Tunis, Tunisia, year 2002, the programme has been improved and consolidated: more than 2200 visitors, 367 exhibitors from 38 countries, 480 bilateral consultation within the buyers/sellers section.

The framework used for the set up of this event, has been that one experimented in Casablanca, that envisaged the partnership with the local and international key actors, besides the preferred partner SIC for the organisation and the preferred partner CBI for financing.

The MIA 2002 assigned a more important role to AFLAI, which office is located in Tunis, the Tunisian associations and intermediate agencies with the CNCC being de facto the focal point at local level. With the cooperation concerns and the linkage with the international cluster, the partnership has been strengthened with some preferred agencies of the UN, EU and World Bank , like UNIDO, CFC, FAO, ICE, CDE and PROINVEST, and some associations of the private sector, ASSOMAC above all.

Box 7 Figure: Evolution of the participations to MIA between 1998 and 2002



## Remarks

### *Organisation*

Analysing the course of growth or bending of the principal parameters that have been made available from the internal reporting of the ITC, referred to the results of the three events concluded up to now, that are Cape Town, Casablanca and Tunis, it may be confirmed that the original objectives have been achieved, at least partly, considering that the anticipated cycle of activity of the project is not concluded yet.

The participants are more than doubled, the exhibitors also, while the diminution of the countries represented, when compared to a growth of incidence in percentage of the representatives of Africa, points out an improving specialization to regional level of the fair, as well as the constant diminution of the participants to the meetings formally selected for the buyers/sellers' section, can mean a positive trend for the fair, therefore toward a more commercial function of the event, compared to the assisted function.

### *International Cluster links*

With the CLIA concerns, and in more general terms, regarding the connection and the support that may be gathered through the opportunities offered by the international network of cooperation agencies, intermediate agencies and the private sector, some goals have been achieved: the cooperation and partnership with some relevant agencies and European associations, being practical and specialised in some fields, as it has been in Tunis, may be considered a success, compared to the more formal and generic support obtained from so many institutions in the cases of Cape Town and Casablanca. The CLIA improvement is not only fastened to the partnership activity between the agencies themselves, for which it is believed, as common sense, that a steering committee from the top to organise so many institutions, from different parts of the world with different missions and targets, will be impossible. A coordination between the T.A. programmes may be achieved mainly by means of the continuous dialogue between the institutions and the private counterparts, and the private sectors of different sub-sectors and different area of the leather and non leather allied cluster.

## Box 8 MIA programme, envisaged performance indicators

### ENVISAGED PERFORMANCE INDICATORS:

THROUGHOUT THE PROGRAMME (1996-2005) AT LEAST 300-440 AFRICAN ENTERPRISES, MAINLY SMEs AND PARTICIPANT TO MIA EVENT, WILL DIRECTLY BENEFIT BY INCREASING THEIR PRODUCTION AND MARKETING SKILLS (AT LEAST 20-40 NEW TRADE CONTACTS FOR EACH)

NEW ANNUAL TRADE TRANSACTIONS AT REGIONAL AND INTERNATIONAL LEVELS.

3000 TO 4000 BUYERS OF AFRICAN PRODUCTS WILL HAVE GAINED A WIDE KNOWLEDGE OF THE OFFER IN THE LEATHER SECTOR

### *The African Agency grouping the cluster*

AFLAI has been designed in order to take advantage of the opportunity of being the preferred interlocutor between private sector and institutions, and ambassador of the African sector through MIA worldwide. No traces of progress in this sense may be found between the ITC internal reports, and the follow up between each event does not contain activities that involve with an important role the AFLAI or other relevant African associations. Apparently the “Africa Leather” review failed to be an instrument of communication for the African sector, and the commitment of some local association, namely FEDIC of Morocco and the South Africans stakeholders (the LIRI has been closed after Cape Town) did not strongly commit themselves to take part to the programme after their own local MIA event. After MIA 2002 of Tunis, in the internal reports ITC it is clearly written that up to now AFLAI is not ready to take over the MIA programme that would continue on more commercial bases.

### *Questions?*

The analysis of the ITC documents give sufficient information to understand how the set up and follow up of the MIA events has been managed, with respectable care and diligence, but does not allow to understand what exactly has been the impact of MIA on the private sector, in terms of quality of the trades, export improvement and the opinion of the private entrepreneurs, mainly due to lack of communication between AFLAI and the stakeholders, also when facilitated by the representing associations or intermediate agencies.

Many questions are still opened and the response will be found only enquiring the key actors representing the private sector that have been involved or touched by the programme in object:

- ❑ **What has been the real impact of MIA on the African market?**
- ❑ **Do the private entrepreneurs deal with MIA? Is this an important event now where to meet international partners?**
- ❑ **Do the MIA events' follow up help the transfer of know how from the developed world to the developing and undeveloped world of Africa?**
- ❑ **Does the benefit obtained by the programme up to now justify further development of MIA?**

## 5. List of interviewed key actors<sup>1</sup>

### I) *Preliminary Enquires*

After analysing the internal documents of ITC related to MIA, the evaluation shows that the MIA is very interesting and very much supported by both the ACP and northern Africans, as also confirmed by the sample focal points selected in the countries that have been recently visited for the feedback' survey.

The evaluation report issued by AFLAI does not give an idea of the real impact of this programme, despite it has been properly edited by a specialised consultant, the Bureau de Ingénieurs Conseil et Formateurs (BICF), to whom the study has been assigned by the steering committee of AFLAI. The sample of participants that has been studied is very limited and not representing all sectors and areas involved, due to the delays of AFLAI about the distribution and collection of the questionnaires, and because the study has been concluded only on papers, developed by an external body, while a discussion about several themes, like how to proceed in future with MIA, has been missed.

During the preliminary contacts with the key actors selected for the briefing and interview on the matter, the impression is that the impact on business has been positive everywhere in Africa, but the impact on business between Africa and the rest of the world has been insufficient because of limited area markets that have been represented in MIA: Europe and Africa only, except of few companies participating because of their background of partnership with the African sector. Three continents have been represented in MIA 2002, Europe, Asia and Latin America, but within a total of 58 participant companies from outside Africa, 84% were from Italy, Spain and France. More world leather sectors should be invited in future, according to the opinion of all entrepreneurs that have been enquired.

The EU market was the most represented in MIA, but with few buyers, most of the visitors and exhibitors were sellers. More buyers are requested for the future.

Africa is thought a limited market and with low quality products, not enough to produce exportable consumers products and with no intermediate and capital goods suppliers. Business meetings between Africans of different Sub-regions show that there are intermediate goods suppliers and that, if there are buyers, also consumer's goods may be traded. The commercial side of the event must be improved.

About the approach to the fairs and symposium events, there are important differences between ACP and Mediterranean African leather sectors: the first have not sufficiently developed a know how of trade promotion and sales, like they do not propose price lists or delivery programmes, but they keep the contacts for further meetings and talks, the Mediterranean's have the same approach like Europeans, but they need more contacts and commercial links. Some assistance may be designed as linked programme to MIA to improve the promotion capacity of North Africa and to train ACP Africa to upgraded trades.

The organisation of the fair is entirely in the hands of ITC at the present moment, and AFLAI is not well known by the majority of the entrepreneurs, and who know AFLAI believes that it will not be able to take over the organisation. Moreover the management of AFLAI is considered not appropriate, only French speaking and no knowledge about the world sector context, but also the concept is thought to be reformed, because this trans-African association has still missed to become the cluster group of regional and national associations, as many between them are interested with MIA but do not commit themselves to take part to AFLAI.

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<sup>1</sup> The texts of the interviews are recorded in the ITC evaluation office archive

One interesting situation is that of Morocco and RSA - the first being an important raw material and producer country, the second is the historically most developed leather industry unit in the continent, and currently the most important African footwear, leather goods and garments market and retailer networks area -, that are not much interested anymore in the MIA project after having had their own MIA events in their countries.

## **II) The Evaluation of the Impact of MIA 2002 in Tunis on the African Leather Sector**

The questionnaire prepared by AFLAI, or ITC on behalf of AFLAI, was complete with the following questions:

- i. Quality of MIA organisation.
- ii. Evaluation of each MIA activity: trade fair, seminars, AFLAI assembly, buyers/sellers, factory visits.
- iii. Have trades been expanded after MIA, because of MIA?
- iv. The amount of business developed as consequence of MIA.
- v. Suggestions to enhance the MIA impact.
- vi. Future sustainability of MIA: level of co-financing required
- vii. Which preconditions would AFLAI have to meet in order to take over the organisation of MIA?
- viii. What about to enter in the MIA association?
- ix. Will it be better to continue with MIA as now, with rotational character or will it be better to establish MIA in a permanent host country? The question requests also an explanation about advantages and disadvantages of both opportunities.
- x. What to expect from AFLAI in addition to MIA?
- xi. Identification of any national or regional intermediate agency, from government or from the private sector, that may give support to MIA.
- xii. About the T.A. given to AFLAI by means of the international cooperation.
- xiii. How to help MIA to organise MIA?

**According to BICF, only 40 participants replied to the questionnaire and most of them did not complete the questionnaires.**

However, BICF tried its best to complete the evaluation and reported that the sample surveyed shows that 90% or more participants have been satisfied by the organisation and the business. About 40% of the participants that replied to the questionnaire indicated that their business has been improved because of the MIA fair, and 30% agreed that their products will be improved on quality because of the new ideas or the suggestions achieved during MIA. More than 50% replied that they would prefer a rotating MIA, but only 13% favoured MIA in one country. 60% believe that MIA should be taken over by AFLAI, but 93% replied that the MIA should be supported according to the present quota of co-financing from the cooperation, with the same facilities offered up to now to the participants: like the booth free of charge and some contribution for lodging.

**The sample that has been surveyed represented 14,5% of the African exhibitors (40 on 276 total). Insufficient.**

It may be not considered significant this sample used for the evaluation, despite the methodology used by BICF was right.

### **III) Mission To Tunisia**

Subject: Organisation of Meet in Africa 2002, and participation to MIA of Casablanca and Cape Town. Interviews with the local stakeholders and meeting with the main actors of the “Comité National d’Organisation du MIA 2002”

Meeting

Meeting’s participants: Mr. Hachemi Cherif, President of AFLAI-FACIC; Mr. Carlo Milone, Evaluator of ITC-CCI; Mr. Badia Lazrag, Consultant specialised with the local sector of the private office BICF; Mr. Salem Fekih, Secretary of the “Fédération de Filière” FNCC (Fédération National du Cuir et Chaussure); Mr. Naceur Elayeb, “Directeur des Etudes et de la Promotion” du CNCC (Centre National du Cuir et Chaussure).

The presents, excluding the writer, represent the restricted executive committee of the Organisational Forum instituted to set up MIA 2002. The proposed questions were the following:

- ❑ How effective has been the preparatory activity.
- ❑ Capacity of Local associations to perform their role.
- ❑ Level of involvement of key National institutions and leading companies.
- ❑ Critical mass of National enterprises participating in MIA (percentage and qualification).
- ❑ Advanced information available on participants from Africa and overseas.

During the meeting the plan of interviews had been scheduled with the private sector and the institutional bodies involved in the project.

However, it is the interview to CNCC that originated most replies to the above enlisted questions, because this training and technical assistance institution, for vocation and role, has been the focal point to set up MIA 2002 in Tunisia, as well as it had been the organiser of the Tunisian group to take part to MIA in Cape Town in 1998, and to Casablanca in 2000. AFLAI, or its Executive Agency that is based in Tunisia, during the development of the MIA project in Tunisia, operated more like the official link with the international leather cluster and the relevant promoting and financing institutions involved in the specific project, unlike the supervising office of the organisation. The function of executive agency for the set up had been transferred to the CNCC instead.

The report of AFLAI has been screened during the meeting. Few words have been spent regarding the report on MIA 2002 (*Impact de MIA 2002 sur le secteur du cuir africain*), mainly because of a letter recently received from ITC that pointed out a substantial disagreement with the general performance of the study. The report has been elaborated by the private consultant (*bureau d’études*) of Mr. Badia Lazrag (BICF). The consultant was not involved in the discussions between the AFLAI managing group about the MIA impact, because there hasn’t been a back up discussion between AFLAI stakeholders about the MIA project, with the exception of the yearly meetings in Bologna supported by ASSOMAC. The study has been completed only on the basis of the few number of questionnaires received and partially filled by the contacted entrepreneurs. No other information could have been gathered from the so called sub-regional focal points, and a benchmarking study including the previous MIA events could not have been possible, since the BICF was not involved in the old projects, and the contacts with the other regional sector through AFLAI<sup>2</sup> are presently very limited. The BICF expert was surprised by the small level of sensibility to the questionnaire showed up through the sector. The reason of the limited impact of the final questionnaire distributed to the African stakeholders may be found between many

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<sup>2</sup> AFLAI-FACIC operating capacity is analysed in the specific section

different elements, like lack of communication, or lack of interest between the not much supported trans-national association's members, but one between some negative elements has also been suggested by BICF. It may be possible that the framework of the ITC-AFLAI questionnaire was more targeted to one to one interviews with a brief discussion, while just a questionnaire to correspond by mail. However the CNCC and the FNCC have discussed the follow up of the project, after the meetings, and they have built up their own opinions, which will be transferred to us by means of the here following interviews.

## **Interviews With The Intermediate Agencies**

### **CNCC**

Interview with Mr. Naceur El Ayeb, Directeur des Etudes et de la Promotion, Centre National du Cuir et de la Chaussure, 17 Rue du Cuir, - Z.I. Sidi Rezig Mégrine 2033 – Tunis – Tunisie – Tel. +216 1 432246/ 255/311 – fax. +216 1 432283

#### ***What is it the CNCC?***

The CNCC is a wide range institution, designed to provide

- Technical assistance,
- Training, and
- Promotion of the local industry and local abilities

#### **Technical assistance (T.A.) and promotion**

CNCC is managing many projects in the area of quality standard control and supervision, laboratory analysis, upgrading (*mise à niveau*) plans of the private sector, organisation of leather and similar fairs (like the annual PROMOCUIR of Tunis), and promotes the participation of the local industry to some international fairs and Symposium. Beside those many activities, CNCC issues newsletters, supports meetings, designs personalised re-training courses for the local managers and technicians, provides programmes to link the local sector with foreign complementary institutions/industries, and cooperates with some other intermediate institutions of the sector, like CEPEX, the institution designed to promote exports, or API, that provides assistance to new investments, and FIPA, the FDI investment promotion office. The CNCC is linked to the private sector through the patronage of the FNCC.

#### **Training**

The CNCC outlines some short terms training and upgrading programmes, as well as it cooperates with three training centres for the managers, and eight professional training centres for the skilled workers and technicians. However the link between CNCC and the training sector are horizontal and not vertical, since the CNCC itself is submitted to the Ministry of Industry, while the training centres are submitted to the Ministry of Instruction.

#### **CNCC Position**

The CNCC depends from the Ministry of Industry, and it is managed by a general Director, that is supervised by a *Conseille d'institute*, a committee of the institute, that includes between its members several professional of the sector (e.g. Mr Cherif, entrepreneur and President of the AFLAI, is member of the CNCC committee). The scheme provides the CNCC with strong linkages with the other institutions, organisms and the private sector.

### ***What was it and what is it the role, played by CNCC in the MIA programme?***

CNCC had been the engine of the participation of the Tunisian sector to the MIA events to Cape Town, Casablanca, as well as was the focal point for the event in Tunisia: CNCC acted as leader between other agencies, to set up the MIA 2002 of Tunisia.

The CNCC, during the MIA of Cape Town and Casablanca, provided all local information, organised the Tunisian exhibitors and visitors, issued the newsletters, received and selected the participation forms. CNCC organised the logistic, travel and hotel booking, as well as it managed the Tunisian contribution to the seminars and tutored the follow up plans involving the private sector.

The same organisation was established for MIA 2002 in Tunisia, plus the coordination between several Authorities that were involved.

The MIA has been very much emphasised in Tunisia, with the participation and patronage, first of all, of the *President de la République*, followed by the direct involvement of other three Ministers: the *Ministre de l'Industrie* for the opening section of the seminars, the closure with the *Ministre du Commerce*, and the *Prime Minister* attended to the opening of the trade fair.

The CNCC will be in charge to organise the Tunisian group for the next MIA to Addis, too.

## **FNCC**

Interview with Mr. Salem Fekih, Directeur de la Fédération Nationale du Cuir et de la Chaussure, section de la Union Tunisienne de l'Industrie du Commerce et de l'Artisanat. N° 17, Rue Abderraliman Jaziri – Tunis 1002 – Tel : +216 71 786418 – fax : +216 71 787740 – [fed.cuir@utica.org.tn](mailto:fed.cuir@utica.org.tn)

The FNCC is including eight sectors of the leather cluster:

- i) Raw hides and skins supply: *la Chambre Syndicale Nationale des Collecteurs des Peaux Brutes*
- ii) Tanning sector : *la Chambre Syndicale Nationale des Tanneurs*
- iii) Footwear : *la Chambre Syndicale Nationale des Industries de Chaussure*
- iv) Leather goods : *la Chambre Syndicale Nationale des maroquinerie et de Vêtements en Cuir*
- v) Export shoes : *la Chambre Syndicale Nationale des Industriels exportateurs de Chaussures*
- vi) Footwear retailers : *la Chambre Syndicale Nationale des Commerçants et Détaillants de Chaussure*
- vii) Components and accessories : *la Chambre Syndicale Nationale des Producteurs de Composants et de Accessoires pour le secteur du Cuir*
- viii) Chemicals : *la Chambre Syndicale Nationale des Industriels Chimiques du Secteur du Cuir*

The FNCC accompanied the CNCC, as preferred partner, during the promotion of the MIA events and for the set up of the MIA 2002 in Tunisia, approaching about 420 associated.

The FNCC was convinced of the benefits of the MIA project since the start up, when in 1998 FNCC was contacted by Mr. Ron Sauer, the ITC expert that first was in charge of the programme.

## **AFLAI-FACIC**

Interview with Mr. Cherif Hachmi, Président de la AFLAI-FACIC. - Z.I. Tunis Cherguia – Rue 8612 n°22 – tel: +216 71 795551 – fax: +216 71 799270

Box 9 Table: Contributions to AFLAI

No.	Name	Task	Delegate of	Country	Contribution USD			
					2000	2001	2002	2003
1	Hechemi Cherif	President	FNCC	Tunisie	300,00	300,00	300,00	300,00
2	Anfre Pelser	Vice presid.	Entrepreneur	RSA	293,80	300,00	-	-
3	Alem Asfaw	Vice Presid.	ETA	Ethiopia	-	-	-	-
4	Hedi A.Lawayeb	General Secr.	Entrepreneur	Libya	300,00	235,00	300,00	-
5	Maaruf Balogoun	General Secr.	Entrepreneur	Benin	300,00	298,80	-	-
6	Ibrahima Diane	Administ.	OMBEVI	Mali	300,00	298,80	-	-
7	Joseph Nkwamou	Board	Entrepreneur	Cameroon	300,00	300,00	300,00	-
8	Immopi Kinnedy	Board	Entrepreneur	Botswana	298,80	-	300,00	-
9	Jean Marc Esperabe	Board	Federation Chad	Chad	300,00	298,80	300,00	-
10	Sam Kiruthu	Board	ESALIA	Kenya	275,00	300,00	-	-
11	Mustapaha Boukaraucha	Associated	Entrepreneur	Algeria	-	273,61	268,00	-
12	Abdel Hafid Boubezari	Associated	Entrepreneur	Algeria	-	270,00	-	-
13	Kue Tamasiga	Associated	Entrepreneur	Botswana	-	298,80	-	-
14	Melli Valid	Associated	Entrepreneur	Mauritania	-		300,00	-
15	CNCC	Associated	CNCC	Tunisia	-		300,00	273,00
16	FNCC	Associated	FNCC	Tunisia	-		-	-
17	Nacereddine Kara	Associated	Entrepreneur	Algeria	-		-	-
17	Total				2.667,60	3.173,81	2.068,00	573,00

## Interviews With The Private Sector

### Tannerie Tunisienne & Tesoro Footwear

Interview with Mr. Cherif Riad, Président Directeur Général des tanneries Tunisiennes et Gerant Directeur de la Manufacture de Chaussures Tesoro, Z.I. Tunis Cherguia – Rue 8612 n°22 – tel: +216 71 795551 – fax: +216 71 799270

The group is including two enterprises, the tannery with a yearly turnover equal to 1.000.000 USD and the footwear unit with a yearly turnover of 500.000 USD. Most of the production is for export, about 80% tannery output, and 60% represented by shoe products.

## **SCIAC**

Interview with Mr. Salem Fekih of FNCC and SCIAC, responsible Mr. Ben Jwemiàa Mohamed. Société Commerciale et Industrielle d'Accessoires et de Chaussures – Z.I. la Goulette Le Kram, 2015 Tunis, tel : 71 978 117 – fax : 71.975 980

The capacity of production of soles and accessories is sufficient to supply 2 million pairs per year. The company attended to MIA in Cape Town, Casablanca and Tunis, and could widen the market penetration through Morocco and some Sub-Saharan countries of the Francophone area.

## **Tannerie De L'Etoile**

Interview with Mr. Salem Fekih of FNCC and the responsible of the tannery Mr. Ben Ghanem Zine El Abidine, Tannerie de L'Etoile, 4-6 avenue Taieb Mhiri Megrine Riadh, 2014 ben Arous, Tel: 71 540 352 – fax: 71 540 746

The medium tannery, employing 80, is equipped with a full capacity of 2 million pieces skins per year.

## **Mondial Cuir**

Interview with Mr. Salem Fekih of FNCC and Mr. Zouheir Mejdoub Karray, President of Mondial Cuir, 25 Rue d'Angleterre centre, Tej Jazira 1000 Tunis – tel: 71 320 233 – fax: 71 324 014

Mondial Cuir is a trading company that supplies leather, components and footwear products.

The company attended to MIA in Cape Town, Casablanca and Tunis.

## **BICF**

Interview with the Consultant BICF

Interview with Mr. Badia Lazrag, expert economist of BICF, rue d'Istamboul 2070 Super Grammarth 3 Tunisie

[www.bcif.com.tu](http://www.bcif.com.tu)

[bcif.consult@planet.tn](mailto:bcif.consult@planet.tn)

tel: +216 71 774 831

Mr. Lazrag is a consultant that cooperate on regular basis with the CNCC.

## **IV) MISSION TO KENYA**

Interviews in Kenya with Mr. Samuel Maina Kiruthu, director of ESALIA (Eastern & Southern African Leather Industry Association), Mrs. Muthoni Muthuri, director of the Kenya Tanners Association.

### **Meeting in Kenya**

The meeting has been developed between two days of encounters, and it has been completed with some contacts with several local entrepreneurs, in order to reconstruct the participation of ESALIA to the project.

### **Tasks:**

- ❑ First task was referring to the participation to MIA 2000 in Casablanca.
- ❑ Second task was referred to the evaluation of the third MIA event, has it had been reported by ESALIA in a document<sup>3</sup> hereby enclosed, edited and distributed through the ESALIA members:

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<sup>3</sup> Final Project Report - Preparation And Logistical Support For Participation Of Selected African Leather Companies From Esalia Member Countries In 'Meet In Africa 2002' -- Tunis, Tunisia 6 – 13 October 2002

1. Uganda Leather and Allied Association
2. Ethiopia Tanners Association
3. Kenya Tanners Association
4. Eritrean Leather and Allied Industries Association
5. Leather Industries Association of Zambia
6. Leather Association of Tanzania
7. Leather Association of Malawi
8. Leather Chamber of Sudan
9. Leather Industries Association of Namibia
10. Leather Institute of Zimbabwe

### **Report on MIA 2000 Casablanca**

The Meet in Africa 2000 fair held in Casablanca between 25th September and 2nd October was the second edition of the fair organized by the International Trade Center (ITC) in collaboration with the SIC Group, Paris, and the Moroccan Federation of Leather Industries (FEDIC) as co-organizers. It was supported by the Moroccan Government, the Import Promotion Office, Netherlands, Islamic Development Bank, African Federation of Leather and Allied Industries (AFLAI), Center for Industrial Development (CDI/CDE), the Common Fund for Commodities and other international organizations and associations

The Meet in Africa 2000 Fair was attended by over 400 companies from 40 countries and was an exhibition of raw materials, chemical products, equipment, components, accessories and finished and semi-finished leather, and finished leather products.

The exhibitors included tanneries, leather traders, process chemical suppliers and manufacturers as well as trade organizations and associations.

The major objective of the fair was to improve, on a global basis, the image of Africa as a supplier of leather and leather products and for the participating companies, both from within and from outside Africa to establish business contacts. In this, it aimed at promoting intra-African leather trade as well as trade between Africa and the rest of the world with a view to strengthening and widening the international market share of African produced leather and leather products. The fair also aimed at introducing and widening the industrial and technical know how in the sector.

#### **□ Intervention of ESALIA:**

1. Identified companies in need of financial, technical and commercial assistance.
2. Organized the travel plans for the participating companies to the fair
3. Coordinated with the fair organizers in the preparation of the African booths in the designated area
4. In collaboration with ITC, promoted and analysed the competitiveness of the companies through buyer and seller meetings organized during the fair
5. Provided logistical support to the participating companies

During the trade fair, the major products exhibited by the companies included:

1. pickled sheep skin

2. wet blue sheep/goat skins and hides
3. crust
4. pickled sheep lining
5. dyed crust sheep skin
6. crust goat lining
7. vegetable tanned leather
8. leather goods: bags and wallets
9. shoe uppers
10. finished shoes

## Report on MIA 2002 Tunis

### Overview of The ESALIA Associated Participation to MIA – Tunis

The Meet in Africa 2002 Fair held in Tunis, Tunisia on 6 – 13 October 2002 was the third edition of the fair and was organized by the International Trade Center [ITC] in collaboration with the Group Semaine du cuir (SIC) - Paris, the Centre National du Cuir et de la Chaussure [CNCC] and the Tunisien La Fédération Nationale du Cuir et de la Chaussure [FNCC] as co-organizers.

It was supported by the Centre for the Promotion of Imports from Developing Countries [CBI]-Netherlands as the principal donor, Tunisian government, United Nations Industrial Development Organization [UNIDO], the Common Fund for Commodities [CFC], Food and Agriculture Organization [FAO], Associazione nazionale costruttori macchine dell'area pelle [ASSOMAC], African Federation of Leather and Allied Industries [AFLAI], Center for Development of Enterprises [CDE], Tunisian Le Centre de Promotion des Exportations [CEPEX] and other international organizations and associations.

Meet in Africa 2002 was the third edition of the Meet in Africa Fairs, the other two having previously held in Cape Town, South Africa in 1998 and the second edition having been held in Casablanca, Morocco in 2000. The fair, deemed to be Africa's greatest leather assembly included conferences, seminars, buyer/seller and partnership meetings, factory visits and excursions and a 3-day trade fair and was thus an innovative combination of three types of events.

The Meet in Africa 2002 was attended by over 300 companies from 35 countries and the event also attracted associations, governments and individuals from all regions of the world. The products exhibited in the trade fair include raw materials, chemicals, equipment, components, accessories and finished leather products.

These meetings brought together various buyers and sellers from Africa and the rest of the world. Match-making was done by the organizers where buyers were matched with sellers to discuss the possibility of establishing long-term trading links between the companies. The meetings therefore acted as a foundation for formation of long-term inter-enterprise strategic alliances or long term commercial agreements between African and companies from the rest of the world.

The participating companies exhibited their various products during this event. The major products exhibited by the companies included;

- ❑ Pickled sheep skin
- ❑ Wet Blue sheep/goat skins and hides
- ❑ Crust
- ❑ Pickled sheep lining

- ❑ Dyed crust sheep skin
- ❑ Crust goat lining
- ❑ Vegetable tanned leather
- ❑ Leather goods; bags and wallets
- ❑ Shoe uppers
- ❑ Finished shoes

## **Summary of Previewed Follow Up Activities**

### ***Genuine Leather Craft PVT Ltd Co. (Ethiopia)***

**Contact – Mr. Teshome Kebede, General Manager**

Genuine Leather Craft PVT Limited Company is a Leather Garment, Upholstery, Leather Hand Bags and car seat covers manufacturing company. The company is based in Addis Ababa and was established in 1992 and currently has 48 employees. Its total investment to date is USD 350,000 and has an annual turnover of USD 4.36 million.

### ***Nalina Limited (Kenya)***

**Contact – Mrs. Nalina Rupani, Managing Director**

Nalina Limited is a locally incorporated company established in 1988. It is involved in the manufacture of leather goods namely handbags, wallets, folders, briefcases, travel bags and handcrafted sisal bags and currently employs 15 people. Its major customers are banks and hotels and they have also tried to venture in the export market with limited exports to Switzerland, Germany and the USA. Nalina Ltd, operate 3 retail outlets in Nairobi, one in the heart of the city and others in two major shopping malls.

### ***Tannery and Leather Improvement (U) Ltd -TALIU – (Uganda)***

**Contact: Mr. Haji Abdul Hakiim Sekandi, General Manager**

Tannery and Improvement (U) Ltd is a company locally incorporated in Uganda established by local business to process hides and skins in 1995 with a total investment of USD 1.1 million. Their major activity currently is the processing of hides and skins up to wet blue with intentions to process up to finished leather once established in the market.

### ***Mosab Tannery (Sudan)***

**Contact: Mr. Elwaleed Fayet Mohamed, Managing Director**

Mosab Tannery is a medium sized tannery located 180 km from Khartoum. Mosab Tannery was established in the year 2000 but started actual production in June 2001. The total investment to date is USD 750,000 and has a designed capacity of 1,460,000 skins per year. It was designed to process leather in all stages namely wet blue, crust and finished leather. Mosab currently employs 75 people.

### ***Malar Industries Limited (Zambia)***

**Contact: Mr. S. Balakrishnan**

Malar Industries is a company located in the copper belt town of Ndola in Zambia. It was established in 1993 and has a total investment of USD 2 million to date. It processes wet blue leather up to finished and its sister company produces footwear and dog chew with the major market for the finished leather and footwear being local while the wet blue is exported mostly to South Africa for the manufacture of upholstery leather and Europe, with Italy being the main market.

### ***Summer Sun Company Limited (Sudan)***

**Contact: Mr. Marwan Osman – General Manager**

Summer Sun Company Limited was established in 1998 and though is involved in the export of wet blue leather does not own a tannery. They have been operating through contract tanning in the established Sudanese tanneries.

### ***Asmara Pickling Tannery Plc (Eritrea)***

**Contact: Yassin Nurhusein Budho, Manager**

Asmara Pickling was established in 1999 to process leather with a capacity to produce 3,000 to 5,000 pieces of goat and sheepskins up to wet blue level. The tannery currently has 60 employees.

### **Interview With Samuel Kiruthu, Director of ESALIA**

Questions to ESALIA ref. MIA 2000-2002 – preview 2004

Tuesday, 09 December 2003-12-29

Interview to Samuel Kiruthu by Carlo Milone

## **V) MISSION TO ETHIOPIA**

### **Meetings in Ethiopia**

The initial and final briefing have seen the participation of the board of ETA (Ethiopian tanners Association), and Ethiopian Tanners, Footwear and Leather Garment Manufacturing Association, recently re-named ELIA (Ethiopia Leather Industry Association).

***Participants:*** Mr. Mulugeta Atsebeba Chairman, Mr. Bekele Eshete Vice-Chairman, Mr. Miftab Surur Secretary, Mr. Girma Belachew, Treasurer, Ms. Salpi Nalbandian Board Member, all of them ETA and ELIA members, entrepreneurs of the private sector, or managers of the public sector in the Tannery field, plus the ELIA members of other sectors, like footwear, leather goods and garments, as Mr. Tesfaye Wukiros, Vice Ch. from Et. Footwear assoc., Mr. Miftab Surur, Secretary from ETA, Mr. Worku Haile, Treasurer, from Awash Leather Garments Man. Ass., Mr. Bekele G/Hivot, from AWASH Leather Garments Man. Ass., Mr. Tesfaye Beyene, from Et. Footwear Ass., while the **Secretary General**, Mr. Abdissa Adugna, was absent, in mission to Tanzania.

### Tasks:

- ❑ First task was to deal with the new coming event in Addis, describing what structure has been set up for the local organisation of the event
- ❑ Second task was to interview the Chairman about the past and future of MIA and AFLAI
- ❑ Finally several private entrepreneurs have interviewed about the impact of MIA events

### The Role of The Local Cluster Organisation

The Ethiopian leather cluster organisation set up an inter-sectoral Association in order to promote and organise MIA 2004 in Addis.

The new organism has been named Ethiopian Tanners, Footwear and Leather Garment Manufacturing Association [Recently renamed ELIA (Ethiopia Leather Industry Association)].

### Profile:

- a) the association shall be known as ELIA.
- b) Established on August 2003
- c) Formed by 3 independent associations: Ethiopian Tanners Association, Ethiopian Footwear Association and Awash Leather Garments Manufacturing Association
- d) Min Objectives of the association:
  - i. to represent the interest of the Ethiopian Leather Sector;
  - ii. to promote business and related cooperation among its members and established good working relations with similar organisations;
  - iii. to represent its members and to cooperate with Government in developing the leather industry;
  - iv. to facilitate in matters regarding quality and standards;
  - v. to organise international leather trades fairs, workshops, seminars etc...
  - vi. to undertake on behalf of members negotiations with any local and international institutions or individuals with a view to promote and encourage the interest of tanners, footwear and leather goods and garment industry.
- e) Board of directors has been elected consisting of seven members:
  - a. Mr. Mulugeta Atsebeha, Chairman from ETA
  - b. Mr. Tesfaye Wukiros, Vice Ch. from Et. Footwear assoc.
  - c. Mr. Miftah Surur, Secretary from ETA
  - d. Mr. Worku Haile, Treasurer, from Awash Leather Garments Man. Ass.
  - e. Mr. Bekele G/Hiwot, from AWASH Leather Garments Man. Ass.
  - f. Mr. Tesfaye Beyene, from Et. Footwear Ass.
  - g. Ms. Salpi Nalbandian, from ETA
  - h. Secretary general is Mr. Abdissa Adugna Chatwa

### **The National Coordination Committee**

ETA and ELIA organised a national Coordination Committee with the scope to promote, organise and tutor the MIA event in Addis Ababa previewed in 2004.

The first meeting of the National Coordinating Committee of Meet in Africa 2004 held on September 3, 2003 in Ministry of Trade and Industry Conference hall has organized three subcommittees:

- a) **Publicity and Promotional Campaign**
- b) **Logistic and Transportation Committee**

The org-chart of such organisms is depicted in the following table.

**Box 10 Draft Organizational chart, activities and members of sub-committees of Ethiopia MIA in Addis 2004**

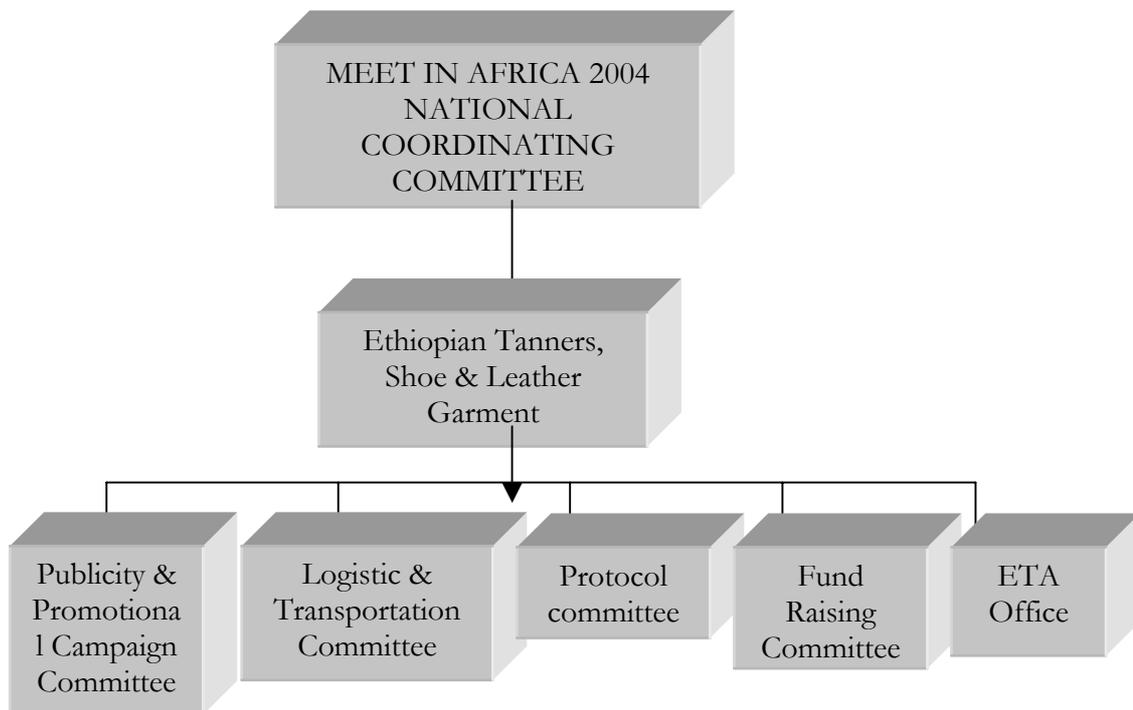
Ethiopian Tanners, Footwear and Leather garments Manufacturing Association

Meet In Africa 2004 Addis Ababa, Ethiopia

National Coordinating Committee

Organizational Chart

The first meeting of the National Coordinating Committee of Meet in Africa 2004 held on September 3, 2003 in Ministry of Trade and Industry Conference hall has organized subcommittees.



**1. Publicity and Promotional Campaign**

- 1.1 Identify domestic companies and make sure their participation in MIA 2004
- 1.2 Extensively promote and publicize MIA 2004 in all means
- 1.3 Identify national as well as world editorial trade press coverage
- 1.4 Identify internet coverage
- 1.5 Produce promotional materials and use all means of local press for promotional campaign
- 1.6 Prepare leather magazine for MIA 2004 event
- 1.7 Identify potential participants local, Africa and the rest of the world

**2. Logistic and Transportation Committee**

### **Interview with Mr. Mulugeta Atsebeha, Chairman of ETA**

Addis Ababa, 11 December 2003

Interview with Mr Ato Mulugeta Atsebeha, president of Ethiopian Tanners Association and President of ESALIA.

### **Interview with Mr Legesse Duki, DESSIE TANNERY P.L.C**

11 December 2003,

Dessie tannery plc.

Private

Contact Person Mr. Legesse Duki

Tel: (251) 1 65 54 07/65 54 76

Fax: (+ 251) 1 65 54 08

E-mail: [dst.plc@telecom.net.et](mailto:dst.plc@telecom.net.et)

P.O.Box: 13405 Addis Ababa, Ethiopia

City: Addis Ababa

Head Office Addis Ababa, Ethiopia Factory South Wolo Zone Haik Town

Tele:+251 3 22 0059/220108

Dessie Tannery Privet Limited Company (DT) is fully owned by Ethiopian investors. The tannery obtained an investment certificate for establishment, from the INVESTMENT OFFICE OF THE AMHARA NATIONAL REGINAL STATE in 1994. The tannery is engaged in producing and exporting 100% pickled and wet-blue sheep and goat skins. The theoretical capacity of the tannery is 1.8 Million pcs and its actual capacity running today is 1.2 million pcs of skins. 70% of these products are exported to Italy and the rest to other countries of Europe and Far East. The tannery is equipped with tannery effluent treatment plant bulled and instilled with the assistance of UNIDO.

#### **1. Presently, which international business links are yours, and with which markets?**

We normally produce skins from sheep and goats skins, our major product lane is goats skins so we are exporting I can say about 90% of our products go to Italy or through other countries to Italian customers.

### **Mr. Ato Teshome Kebede, GENUINE LEATHER CRAFT Pvt Ltd CO.**

12 December 2003

Owner: Private Share holders

Contact person: Mr. Teshome Kebede (CEO, Managing Director)

Tel. (+251)-1- 53 18 94, 52 35 86

Fax: (+251)-1- 51 88 41

E-mail: [glc@genuineleathercraft.com](mailto:glc@genuineleathercraft.com)

P.O.BOX: 2218

Addis Ababa

Location: Masqal Square, Woreda 18 Kebele 07 House # 279

Genuine Leather Craft was formed as a private limited company in 1992 to produce high-class leather garments for the export market. It was inspired by the raw materials base and the traditional leather craftsmanship of the Ethiopian people that has a recorded history of more than three thousand years.

Because the company was formed to produce high class leather garments for the export market at the outset, it was imperative that its direct work force was trained in the most up to date skills of leather garments making to suite the tastes and trends of the European markets targeted by the management. Accordingly, reputable technicians were employed to work in the factory for a number of

months and train the personnel of the company on-the job in the art of exquisite leather garments making.

Experts from France, Italy, Germany and Pakistan have been employed over the last six years and enabled the company have some of the most sophisticated technicians in Africa and by far outstanding in the country.

Its indirect labour force too has been kept abreast of the competitive environment that the company has to work in starting with the most stringent test of academic caliber at recruitment followed by continuous refinement through on the job and off the job skill development later.

Communication skills, language proficiency and customer handling capabilities of the marketing personnel are matters closely followed up to remain at high standards through exposure to international business practices in sales out let management. The operations of the company are computerized from management to up-dating fashion trends of the finished products reinforcing the human resources aspect so as to attain harmony with the overall high end setting the company strives to achieve.

### **1. What is the production of Genuine Leather?**

G.L. is producing garments for export and local markets, and now we are expanding to the leather goods sector. At the moment 38% of our outputs are for export, the remaining are for local market.

### **The Feedback**

Lack of communication between the Eastern African associations of the leather sector and AFLAI resulted from the confused response received after the follow up inputs of AFLAI. ESALIA, - that contacted all the participant in the Sub-Region, but organised the trip round facilities only for few of them, while the others subscribed their participation directly to ITC -, received most of the enquires of assistance by the participants of the related area, those fasten to ESALIA and the other too, and consequently the Director of ESALIA felt necessary to produce a report for the stakeholders in order to let circulate the information, but did not think to report these information to AFLAI for the feedback, as depicted in chapter 3.

In the other way the 19 participants coming from Ethiopia did not produce any document, and have limited their conclusions and remarks to an internal de-briefing between the associations members, but they have distributed and collected when completed the AFLAI questionnaire entitled “Meet in Africa Evaluation”. However ETA did not screen and discussed the questionnaires, they thought these forms were something interesting for AFLAI, but they did not consider them a tool for their own activities. Despite this approach, most of the subscriber, 10 enterprises, 55% of the participants from Ethiopia, between them one leather garment manufacturer, one in the footwear sector exporting shoe uppers, and the others tanners, have filled properly the questionnaire.

The replies to the questions distributed through AFLAI and the short talks we had with most of the managers of the manufacturing sector, shows that the Sub Saharan African Entrepreneurs, at least those operating in East Africa, specifically those of Ethiopia where the biggest sector is located, had and still have big expectations from MIA, in terms of promoting the African market between Africans, the African abilities and know how up to now achieved through the entire world, and in terms of international trade opportunities. While they have been very happy with the inter-sector African links achieved by means of the MIA fair and meetings, they still evaluate as insufficient the quality and quantity of visitors from international markets, being most of them sellers and not buyers.

Somebody replies to the question about the technology transfer and the market knowledge (“after MIA, do you know more about the technical and or economic aspects of the leather sector?”) the

following: “yes because we benefit from technical assistance gathered through the service of ESALIA”, that means that the event is still much viewed as a cooperation activity, to be part of it in order to have tight contacts with the international agencies of the T.A.

Regarding the change in the business behaviour of the participants, most of the people that replied positively, expressed their satisfaction for meeting other African sectors and operators, and for encountering upgraded technologies, for example in N. Africa, more advanced than those in use in ACP Africa, but more affordable than the EU technologies. The large industries are less interested in the African market, because they already know it and because they expect more opportunities to export to the first world.

A little business improvement overseas is also claimed by few companies, most of them in the leather garment sector, producers of consumer goods, who met some African traders. In the other hand the producers of intermediate goods, like finished leather, reported that they met always the same usual purchasers, may be in a better way, staying all together in one place with more time to discuss business, compare prices and design strategies.

## **VI) Mission To Morocco**

**Subject: Organisation of Meet in Africa 2000 in Casablanca, and participation to MIA of Tunis and Cape Town. Interviews with the local stakeholders and meeting with FEDIC (Fédération Marocaine des Industries du Cuir) that organised MIA 2000 of Casablanca**

### **Meeting**

#### **Meetings and interviews:**

- 1) **FEDIC**, 50 Rue Tata 4<sup>ème</sup> étage – 20000 Casablanca – Maroc – Tel: +212 22 22702/227716/ fax 227299 – [fedic@menara.ma](mailto:fedic@menara.ma)
  - a. Mr. Abdeslam Alaoui El Hassani (President), also President of the footwear unit Macha, tel: +212 22 255337/256701/ fax 230206/231407
  - b. Mr. Abdelkader Bennouna (Secrétaire Général)
  - c. Mr. Elghazowanis Elk Ayati (Chargé de Mission)
- 2) **FAVEC**, 148 Route des Ouled Ziane – angle rue de Margaux 20 500 Casablanca – Maroc
  - a. Mme Fayza Laraki (administrateur), leather garments
- 3) **SMART**, 30 Rue Massena, Casablanca – Tel: +212 22 231195/256233/ fax 258326, « Maroquinerie » (leather goods)
  - a. Mr. Mustapha Bennis (administrateur unique)
- 4) **Tannerie Mohammedia, Group Aguzal**, Rue Cadi Tazi – Mohammedia – Maroc, Tel : +212 23 324514/15/16/17 / Fax 324722
  - a. Mr. Aziz Mahboud (Directeur)
- 5) **Tannerie Nouvelle SOMATAM**, tannerie, Mégisserie, fabrique de chaussures, 11 Rue capitaine Thariat – Casablanca – Maroc – tel: 212 22 618282/98 621033/35 fax 618041 [nouvelle-somatam@casanet.net.ma](mailto:nouvelle-somatam@casanet.net.ma)
  - a. Mr. Motahar H.H. Al Turkey (Gérant unique)
  - b. Mr. Said Fourari (Chef dép. Chaussure)
- 6) **Tannerie de Boujaad**, 4 Rue Rachid Reda – Casablanca 20300 – Maroc – [tboujaad@caramail.com](mailto:tboujaad@caramail.com) - Tel : +212 22 620567/618814/605657/ 605671 fax 620254
  - a. Zakraqui Ahmed (Administrateur)
  - b. Zakraqui Mohammed (President) and President of ATC (Association Marocaine de Tannerie) 47 Rue Planquette, 2 étage - Casablanca

The President of FEDIC and the other stakeholders participated to the exhibition of Casablanca, but no one of them was present in Tunis. We could not meet during the mission anybody between those 10 companies that participated to MIA 2002.

Apparently FEDIC has no more interest in the MIA programme and did not promote the participation of the local sector to the event of Tunis, as well as will not promote the participation to Addis Ababa.

### **Interviews with the President of FEDIC**

#### **Interview with Mr. Abdelsalam Alaoui El Hassami, President of FEDIC.**

### **What is it the FEDIC?**

The FEDIC is the cluster<sup>4</sup> association of the leather sector in Morocco, including tanning, footwear and leather accessories, like garments and leather goods. FEDIC operates by means of an office, 1 general secretary, 1 assistant, 1 executive and 1 communication expert for the set up of a web site. The Federation was created in 1991 and works closely with the CMPE (Centre Marocaine pour la Promotion et l'Export)

### **Interviews With The Private Sector**

### **FAVEC**

#### **Interview with Mme Fayza Laraki (administrateur). Trade sector : leather garments produced on order for international trade marks.**

The company participated to MIA 2000 in Casablanca with an exhibiting booth, and the manager confirm that they have received a visit of several buyers from Europe, but also from India and Pakistan where they had positive follow up.

### **SMART**

#### **Interview with Mr. Mustapha Bennis (administrateur unique). Trade sector: leather goods.**

The company is working 80% for foreign purchasers from France and Spain. The role of SMART is that of a subcontract unit, but 20% of the production is still distributed through the domestic market. During the exhibition of Casablanca MIA 2000, SMART was present with a booth complete with a set of samples, new models and a complete catalogue with prices.

### **Tannerie Mohammedia, Group Aguzal,**

#### **Interview with Mr. Aziz Mahboud (Directeur)**

Mohammedia is a large tannery, producing for the domestic market and for export some dry crust after colouring, and finished leather. The company usually exhibits to Bologna Lineapelle, to Düsseldorf GDS, to Barcelona *Pielespana* and to Hong Kong.

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<sup>4</sup> L'industrie du cuir occupe une place importante dans le secteur des industries de transformation avec 349 unités employant plus de 18 000 personnes. La production s'est élevée en 2001 à 2,4 milliards de dirhams, la valeur ajoutée à environ 844 millions de dirhams et les exportations à 1,4 milliard de dirhams. Les investissements ont connu une évolution favorable durant ces six dernières années en passant de 86 millions de dirhams en 1994 à 165 millions de dirhams en 2001. Le secteur du cuir recouvre plusieurs activités : la tannerie, la maroquinerie, la confection de vêtements et la fabrication de chaussures, branche la plus performante et tournée presque exclusivement vers l'export.

## **SOMATAM**

**Tannery for hides and skins leather, sub contract unit for the production of shoe upper. Interview with Mr. Motahar H.H. Al Turkey (Gérant unique), and Mr. Said Fourari (Chef dép. Chaussure)**

SOMATAM exhibited in Casablanca MIA 2000.

## **Tannerie de Boujaad,**

**Interview with Mr. Zakraqui Ahmed (Administrateur), and Mr. Zakraqui Mohammed (President), and President of ATC (Association Marocaine de Tannerie).**

The company is specialised in the production of wet blue and finished leather. Mr. Zakraqui is also President of the ATC.

## **VII) MISSION TO SOUTH AFRICA**

### **Meeting with the SAFLEC**

Presents:

Mrs. Nora Hill

Director of SAFLEC (South Africa Leather Export Council)

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Mr. Mark Gibbins

SAFLEC Chairman

APECO.....

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RSA delegate to AFLAI  
Mossop Western Leather  
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P.O.Box 501 Wellington 7654 – RSA

The meeting is in Durban with Mr Grant Hansen, Mark Gibbin, André Pelser and Mrs Nora Hill. They are all members of SAFLEC.

Mrs Nora Hill explains that she was in charge to do the first report on the feed back of the first Meet in Africa here, in 1998.

### **Interview with Mr. Rolf Otmanns**

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RSA  
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t. +27 31 7004275-6-7-8 fax 7001011  
[rwo@iafrica.com](mailto:rwo@iafrica.com)

Mr. Rolf is the chairman of a large footwear machine manufacturing unit. He is also in charge, on behalf of SAFLEC, the parastatal committee designed to support the sector and link the private with the public, to set up a plan to rehabilitate the training institute. For this reason he is following some activities of the international cooperation and got some connection with the Italian sector for the transfer of know how in view of implementing the rehabilitation project.

### **Interview with DTI**

Mr. Simon Sello Mello  
Sector Manager of Leather and Footwear Trade & Investment  
The Department of trade and Industry of South Africa (DTI)  
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[www.thedti.gov.za](http://www.thedti.gov.za)

The DTI had been involved in the first MIA event, but no records are now available. However Mr. Mello is informed about MIA and he is interested to involve somehow the public sector if eventually a future event will be organised in South Africa.

### **Interview with SAFLIA**

Southern African Footwear and Leather Industries Association

Dennis Linde

Executive Director

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The footwear sector in South Africa is facing a tremendous crisis, and the South African market, being a good consumers' market, is satisfied mainly by imports from China. The footwear production was of 63 million pair of shoes in 1992 and now in 2003 has been of only 20 millions.

The sector is hoping in the regional integration, and in the ASGOA opportunities, however at the present moment the situation is very unstable. A trade fair for Africa is an opportunity, because South Africa is expecting more expansion between the inter African Business.

SAFLIA is not part of AFLAI, nor it has been invited to the past events, except for Cape Town.

With the rehabilitation of the training institute concern, Mr. Dennis explain that part of funding may be gathered from the State. In fact 1% of the benefits included in the salary costs, is reserved for the Clothing Textile Footwear & Leather system, and 0,8% per employed goes back for training, i.e. with the financing of the institute when operating.

### **Interview with Gringo Leather**

Mr. Rowan Allison

Mr. Pierre Van Niekerk

Partners

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The tannery is producing leather for the footwear industry, where the business is shrinking very much.

The tanning sector is in good health only with the upholstery leather for the car industry, for which some leather is also imported from Brazil.

### **Interview with Mr. Tony Dickson**

Mr. Tony Dickson is a journalist, director of "The Complete Leather, Footwear and Leather Goods Trade Magazine for South and West Africa".

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[tony@svmag.co.za](mailto:tony@svmag.co.za)

The review is distributed through the COMESA and the Southern African countries, plus Egypt.

The Director would like to have the opportunity to deal with MIA in order to identify opportunities of cooperation.

## **VIII) Mission to Senegal**

### **Interview with Dr Lamine Gueye (vétérinaire et économiste agricole).**

PAPPEL - Responsible of Consultancy for the “Projet d’appui à l’élevage”, the “Papelle” project, sponsored by the CFC and implemented with the partnership of the Ministry of Agriculture of Senegal, and <sup>5</sup> Dr Lamine Gueye – B.D. 6852 Dakar Etoile, + 221 8219125 – 8219122, fax 8219122; [lamine-gueye@papelsenegal.org](mailto:lamine-gueye@papelsenegal.org); gsm + 221 6523896

Dr. Lamine Gueye, in cooperation with Mr Paul Klote, Directeur Général of SIPP (Société Ivoirienne de Production de Peaux) started a initiative to set up regional cluster association of West Africa, “Association Régionale des Professionnels des Cuirs et des Peaux en Afrique de l’Ouest” (ASRPCP-DAO) beginning some informal meeting of this association taking advantage of the MIA meetings, where most of the entrepreneurs of the leather sector in the region have been invited.

The Association of West Africa has been inspired by AFLAI-FACIC, a sub regional link to the trans African cluster implemented under the umbrella of ITC, however up to now the ASRPCP – DAO did not go forward, except for several informal meetings. Main target of the project is to set up a regional organisation to group the leather cluster of the region, where the objective is that to achieve a strong sectorial forum, that will be able to support the idea to organise a MIA event in a country of region in the near future.

### **Interview with M. Issa Sy, General manager of SEMEX.**

SEMEX – (GSM phone 6388142), SEMEX S.A. (CUIRS ET PEAUX), tel. +221 8361661 – 8545020; fax 8361882; km 2 Route de Rufisque, B.P. 2329 Dakar, Senegal. [semex@sentoo.sh](mailto:semex@sentoo.sh)

SEMEX is the largest company in Senegal, that trades raw hides and skins worldwide, but they also export wet-blue, that they process on sub-contract basis by means of TANAF, one of the two largest tanning units in Senegal.

### **Interview with Mme Diagne n’Déye Fama Sakha, Director of SOCOPRES**

SOCOPRESS - Almadies Zone 12-4B – B.P. 17466 DL, Dakar, Senegal  
Tel. +221 8205581 fax 8219695 – 6384403  
[famadiagnesakho@yahoo.fr](mailto:famadiagnesakho@yahoo.fr)

Mme Diagne was the former director of SERA (Société d’Exploitation des Ressources Animales du Sénégal), a National State owned company designed to control the meat market and the sub-products. The State monopole on the animal husbandry ended in 1987, and now SERAS failed to be privatised and closed the activity in 2001. SOCOPRES is a trade company born after the closure of SERAS and created by some former managers of SERAS.

### **Interview with TAMAF**

TAMAF (Tannerie Africaine) S.A. Société Industrielle des Tanneries Africaines.  
Route Nationale 1 - Face Sacocim  
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t. +221 8362300 fax 3033  
[sedar@sentoo.sn](mailto:sedar@sentoo.sn)

The director Mr Babacar Mbengue attended to MIA in Cape Town, Casablanca and Tunis.

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<sup>5</sup> Mrs Fatou Séue, t. 8275275, [www.sices.sh](http://www.sices.sh) ; [fatou@sices.sh](mailto:fatou@sices.sh); fatoucices@yahoo.su

## Interview with CICES

CICES- M.me Fatou Sene

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[www.cices.sn](http://www.cices.sn)

CICES is the focal point for MIA for the communication through Senegal.  
Ms. Fatou is very much promoting the opportunity to have MIA in Senegal in future.

## **IX) Mission to Mali**

### **Meeting with the local stakeholders**

OFFICE MALIEN DU BETAIL ET DE LA VIANDE OM.BE.VI.

Mr. Ibrahima Diane Directeur Général adjoint

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Dr. Ibrahima is the focal point of MIA in Mali and member of the board of AFLAI.

The following entrepreneurs participated to the Casablanca and Tunis:

Ets: Lory EXPORT

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Italian Consulate and exporter of raw hides and skins

WEST AFRICAN TANNERY

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Joint venture between Spain and Mali, a tannery that produces wet blue.

ARMA EXPORT

Mr. Adama Toure

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A trading company that export raw hides and skins through Senegal.

TAMALI sa

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Tannery for wet blue

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[alhouseini2002@yahoo.fr](mailto:alhouseini2002@yahoo.fr)

Raw Hides and Skins export trader

**Box 11 Remarks: the improvement achieved by the local cluster organisation**

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The country needs a lot of assistance to set up a national cluster organisation. A new association representing the sector of Mali has been created, the "Mutuelle des Professionnels du cuirs et peaux (MPCP)" that will play a more active role within the sector in the region (West Africa). However the MPCP does not believe in the capacity of AFLAI to be the right instrument to build up the African network of the leather cluster.

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The Mali has a relevant livestock and produces a good number of raw hides and skins. Given 75.000 million CFA the value of the national livestock in the year 2000, the value of the output raw leather is 10.053 million CFA, equal to 13,4% of the livestock value.

Mali is one of the largest producer of hides and skins in West Africa, but a large part of the output is wasted, only 8,38%, controlled by the private sector but processed in public abattoirs, is of good quality standard and 31,06% only is exported. The remaining available raw hides and skins are processed in the local tanneries, or traded locally or are lost: 5,41% only of the total available raw material are tanned in wet blue for export and few finished for the domestic market.

Through the MIA the Malien sector is also trying to get T.A., because, after the liberalisation, the local sector has not been supported and the National collection and tanning system has not been transferred to the privates, but has been left down.

In conclusion Mali summarises the following weakness and strengths:

- Strengths:
  - The existence of private associations and public bodies, sensible to the needs of the sector.
  - The actors - publics and privates - involved are conscious of the importance of the sector for the development of the industrial sector of the country.
  - The existence of a traditional sector of artisans, skilled in the leather business.
  
- Weakness:

- The low rate of leather output and bad quality of raw hides and skins: 50% of the available raw leather is not collected at the moment or it is wasted through the dealers networks. This is for insufficient infrastructures, low grade methods of flaying, lack of experience and lack of information through the leather dealers and retailers.
- The informal market at all levels of the cluster: raw hides and skins, leather and second hand shoes.
- Bad access to the necessary financing to implement new business in the sector.
- Weak tanning sector.

## **X) Contacts with Egypt**

### **Contacts with the Chamber of Leather & Fur**

Mr. Mandouh Th. M. Mekky

Chamber of Leather & Fur

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A new tanning district is being built in Egypt. The Master Plan was carried out by Assomac Servizi Srl, the service company of the industrial association that brings together the Italian manufacturers of technology for the footwear, tanning and leather industries, which considered the possibility of transferring the tanneries that are currently in the city of Old Cairo. The Assomac Servizi Srl technicians proposed a solution that, modelled on the Italian industrial districts, suggested the transfer of the tanning, footwear and leather production sites to the areas of Badr City - Robaiki Area, near Cairo, which will be equipped with modern technology to ensure environmental compatibility and functional aspects. In the area a Technological Service Centre will also be built equipped with the most modern infrastructures and with technical and managerial training programmes, in order to provide tangible support to the companies in the district. The project, which is a true modernisation plan for the Egyptian leather industry, is now entering its implementation phase, thanks to financing made available by the Egyptian government and through help that has also been offered by Italian Cooperation. Assomac Servizi Srl will play a very important role in this operational phase too, and will act as consultant to the Egyptian Ministry of Industry. The initiative was presented in Bologna during a press conference that was held on wednesday October 29th during Tanning-Tech, the leading trade fair for technology and chemical products for the tanning industry which a large delegation of Egyptian and Italian business owners interested in the project also attended. For the guests, the Egyptian Commercial Consul, Abdel Aziz El Sherif, the Chairman of the Chamber of Leather Tanning and the Arab Federation of Leather Industries, Mamdouth Th M. Mekki, the Africa and the Middle East Chapter Chairman and Arab Union for International Exhibitions and Conferences Secretary General, Hisham El-Haddad and the General Secretary of the Arab Union for Leather Industries, Yousef A. Sa'ad all intervened at the presentation. Amilcare Baccini, Managing Director of Assomac and Secretary General of Tanning-Tech and Mario Pucci, head of international relations at Assomac instead played host. This is not all, however. On this occasion, a new trade fair was also presented. This is the "Cairo International Leather Show" which will take place for the first time from 9th-12th December 2004 in the Egyptian capital. The aim of the initiative is to provide the Egyptian leather industry with an important occasion for the promotion and commercialisation of their semi-finished and finished products and to provide the area with an international event that could be the market place for the Region, an area with more than one billion inhabitants.

The Chamber of Leather & Fur is interested to screen the opportunity of partnership between the Egyptian “Cairo International Leather Show” and MIA.

## **XI) Contacts with Algeria**

### **The Group “Leather Industry”**

Mr. Ahcène Benyoune

President

Leather Industry

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Hussein dey

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Algeria

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The president of the State owned leather industry, named Group of “Leather Industry” attended to MIA in Tunis.

Algeria’s animal assets are mainly based on sheep, with 9.6 million animals, while there are about 600,000 cattle, and about 1.2 million goats. Animal butchery is often carried out by hand and meat and by-products of butchery, that are subject to TVA (VAT), have a limited sale through official routes: the informal market is the dominator here and the local raw material assets are distributed for exportation abroad, to other Maghreb countries or are processed, again “informally”. Some leather-tanning factories that are still state-owned, waiting to be sold to some private investors, an afflicted by a chronic insufficiency of financial means and with the need to purchase raw material burdened with 16% VAT, cannot manage to compete with the official export market that pays cash, nor with the informal market that does not pay VAT.

Algeria is mainly a customer for Chinese exports, that exported 150 million pairs of shoes to Africa the year 2003. Between the most important importers there is Algeria (1.8 million pairs).

Algeria has a small footwear industry, with fewer than 2000 employees, that produces about 1 million pairs.

### **CNTC**

Centre National Textile Cuir Chaussure et Jouet, Algeria

CNTC-SPA BOUMERDES

Director : Mr. Mourad Fodil

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Torino, sabato 21 agosto 2004  
Autore: CARLO Milone  
A: PISIE & Barbara Guarducci

Note:

## ***Introduzione all'estetica africana***

Area di riferimento: Africa Subsahariana orientale e meridionale

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## Introduzione

### **Il gusto africano poggia su una solida base sperimentale dell'arte**

Le società e le culture africane sono state a lungo pensate sotto il segno della chiusura e dell'immobilità; le loro arti incasellate nello spazio rigido di una classificazione che le consegnava all'immobilità entro i confini di una differenza statica e di maniera. Nella discussione che contrappone i primitivi ai civili, le società chiuse a quelle aperte, l'Africa veniva collocata da un lato e l'Europa dall'altro. Ad esempio scrive l'etnografo Ladislav Segy, studioso delle maschere africane (1952): *“Non appena religioni e valori materiali sono stati introdotti in Africa, rimuovendo il fondamentale, antico bisogno per il rituale religioso, la qualità della creazione artistica africana è declinata. La produzione contemporanea consiste per la maggior parte nella produzione di copie di prodotti autentici africani o di prodotti d'importazione. Possiamo semplicemente dire che gli artisti e gli artigiani africani mettono la mano, ma non il cuore nel loro lavoro, che di conseguenza è divenuto privo di anima”*.

Quello che invece oggi è possibile proporre è una lettura dell'estetica africana all'insegna dell'apertura e della complessità, della disponibilità all'incontro ed al cambiamento. L'identità dell'estetica africana non deriva dal riproporsi inalterato di un fondo archetipico così come spesso appreso attraverso gli osservatori europei, ma dalla sua capacità di adattarsi al presente, di riferirsi al passato e di darsi un futuro all'interno di contesti variamente differenziati nelle varie aree geografiche e attraverso diversi contesti culturali.

Il design africano trova nell'apertura all'altro, uomini, divinità o culture, la sua condizione di opportunità: nell'elaborazione comunitaria dei prodotti d'uso comune, miscela di modernità e tradizione, nell'assunzione d'identità nuove attraverso molteplici contesti d'uso, nei modelli interpretativi artistici che tentano di dare forma all'invisibile, di tracciare soglie e passaggi all'interno e all'esterno del mondo umanizzato, di istituire infine rapporti con altre culture.

L'apertura verso il mondo esterno non segna la decadenza del gusto estetico africanoma si riscontra già dall'origine, ad esempio nella produzione artistica tradizionale africana. I rapporti fra le diverse culture africane ed i rapporti con gli altri continenti, da un lato moltiplicano le forme artistiche soprattutto del sacro, dall'altro ne riducono l'intensità e ne riducono l'estensione, privilegiando altre forme e portando l'arte sul terreno della produzione di manufatti utilitaristici.

### **Il gusto africano si è sviluppato prevalentemente al di fuori dell'Africa pur finendo con l'appartenerle.**

Se possiamo parlare, come enunciato nel titolo di queste note introduttive, di estetica africana, è solo a partire dall'arrivo di oggetti artistici o prodotti artigianali provenienti dall'Africa in Occidente, dalla loro inclusione tra gli elementi decorativi domestici occidentali e in un ordine discorsivo o in un campo di visibilità determinato dall'abbigliamento soprattutto giovanile.

L'identità degli oggetti si definisce a partire dalla relazione con lo sfondo su cui si stagliano, la storia della loro ricezione e dell'uso che ne viene fatto, definendone e modificandone le condizioni di visibilità e di senso, divenendo parte integrante del gusto, della *moda* nel mondo ad alto sviluppo.

Gli oggetti africani si spostano a grappoli, le migrazioni sono di massa, ma non sono sempre gli stessi oggetti che troviamo sotto l'etichetta di *gusto africano*: alcuni oggetti si perdono e altri si aggiungono perché, con il mutamento dei dispositivi di potere e di conoscenza, diversi sono i filtri che vi vengono sovrapposti, le relazioni di contiguità che vengono stabilite, le rappresentazioni della realtà che si vogliono comunicare.

**L'immagine occidentale dell'estetica africana è ancora definita dalle immagini dell'art nègre, dell'arte tribale, all'arte etno-africana. L'arte africana nasce nel XX secolo in Europa per poi essere esportata in Africa e divenire elemento costitutivo dell'identità panafricana.**

Gli oggetti africani, decorativi quali le sculture ed i quadri, o d'uso quotidiano quali i prodotti in legno e ceramica, i tessuti, i vestiti, le calzature e gli accessori sono rimodellati dai loro spostamenti all'interno dei quadri epistemici occidentali divenendo di volta in volta oggetti culturalmente neutri, ad esempio nello spazio rinascimentale, oppure oggetti diabolici e di superstizione nella visione dei missionari cristiani dell'ottocento, o ancora oggetti in stile "*fossile*" testimonianza dello stadio primitivo dell'umanità. Passando dal gusto primitivo, all'*art nègre*, all'arte tribale, all'arte etno-africana, tali oggetti fanno la loro apparizione entro quadri spazio temporali completamente diversi divenendo sopravvivenza di stadi arcaici dell'umanità, o substrato permanente della psiche umana, prodotto di estese condizioni geografico climatiche, o simbolo di civiltà etniche circoscritte.

## 1. Specificità e differenze della cultura estetica africana

### L'arte africana è diffusa tra gli oggetti di uso comune

Il continuo rimando fra le parti e il tutto – per cui tutto è in tutto- in un rapporto di analogia e partecipazione rende problematica la stessa applicazione delle categorie attraverso cui siamo soliti sezionare il modo in parti nettamente distinte. Infatti per quel che riguarda le culture africane non solo l'arte, l'economia, la religione ed il diritto non possono essere pensati nelle forme occidentali del bello, del mercato, o della chiesa o del tribunale, ma diviene problematica la loro stessa distinzione in sfere autonome: la religione non persegue la salvezza individuale dell'anima, la produzione e lo scambio dei beni non seguono la logica della massimizzazione degli utili, il potere spesso non ha il volto della legge e della definizione territoriale.

Oggetti o figure disegnate su vari materiali, dal legno ai tessuti alla terracotta al cuoio, non trovano alcun termine nobile equivalente a quello dell'arte che possa raccogliarli in una stessa area semantica, sotto l'ombrello di un senso comune. L'arte, l'architettura ed il design in Africa non costituiscono un territorio concettualmente e istituzionalmente separato: **non vi sono artisti e non esistono designer**. Nonostante ciò di norma abbiamo a che fare con oggetti d'uso comune e indumenti esteticamente elaborati, oggetti in cui alla dimensione estetica si uniscono valenze funzionali (rituali, sociali, religiose) attribuendo alla bellezza stessa (o alla bruttezza) doti operative.

#### Immagine 1 Alcune calzature africane

##### Sandali africani

Nel IV sec. sorsero nella parte a est tre imperi, il regno di Aksum che comprendeva Etiopia ed Eritrea, quello del Sudan e quello del Ghana situato, fino all'XI sec., nell'ansa del Niger mentre in Angola e Mozambico si formò dal XV sec. l'impero Monomotapa.

I cuoi ed i pellami impiegati dalle tribù africane di queste aree per la fabbricazione di sandali erano ammorbiditi con sterco di vacca e conciati con estratti tannici dalle foglie di mangrovia.

Quelli delle immagini sono una derivazione moderna per il mercato turistico



## **L'estetica africana si avvale soprattutto del corpo, ha come strumento privilegiato il tessuto, il cuoio o il legno e si esprime in modo completo attraverso i colori**

Il fatto che intenzione e percezione estetica siano diffuse fra innumerevoli oggetti con valenze strumentali e che solo raramente, in alcuni manufatti, siano presenti in modo esclusivo, non impedisce tuttavia il loro coagularsi in luoghi estetici privilegiati: si tratta soprattutto del corpo e dei tessuti. Lo stesso si può dire dell'uso del colore che non mira alla rappresentazione realistica, ma alla trasformazione della realtà. Il colore non è un effetto di superficie, una qualità secondaria, ma un principio costitutivo delle cose, ciascuna delle quali consiste di colore e armonia visiva, di una mescolanza di bianco, rosso e nero (i tre colori fondamentali dello spettro cromatico africano), con prevalenza distintiva a turno di uno dei tre. L'intervento taumaturgico sui colori è teso a ristabilire l'ordine del cosmo: il cammino individuale della vita, verso la morte e poi la reincarnazione è un procedere ciclico, di colore in colore verso un processo di maturazione che si risolve nello scioglimento e nel rilancio della sintesi transitoria della persona; dal bianco, colore dell'aldilà e della fragilità dell'infanzia, al rosso della giovinezza come processo dinamico dell'iniziazione al nero austero del potente vecchio e saggio, per poi tornare al bianco della morte e della rinascita ecc...

### **Cucchiaio antropomorfo Zulu, Sudafrica**

Il cucchiaio aveva valore simbolico eccedente la funzione immediata. Il suo uso era essenzialmente rituale. L'integrazione tra finalità utilitaria e il motivo figurativo associa simbolicamente cucchiaio e donna.



Immagine 2 Etnie e culture tradizionali maggiormente significative per il gusto estetico dell'Africa orientale

## 2. Estetica Africana: la convivenza del vecchio con il nuovo

### I Segni estetici del potere: nell'abbigliamento africano si cerca di fare coesistere vecchio e nuovo, egualitarismo e autorevolezza delle istituzioni

La dimensione operativa dell'abbigliamento e degli accessori della persona, quella che ne fa elementi articolanti un rapporto di forze, non solo esprime la posizione di uno dei contendenti in lizza in relazione agli altri (ad esempio nelle differenze ordinate di pregio e prestigio degli indumenti di ciascuno), ma è talora reperibile nel singolo oggetto che diviene allora terreno di battaglia fra le forze opposte in ambiguo e instabile equilibrio. Lo *jibbeh*, uniforme sudanese degli ufficiali mahdisti, ce ne offre una illuminante testimonianza. Proprio alla massa dei seguaci di Muhammad Ahmed detto il *Mahdi* –profeta- che nell'ultimo ventennio del secolo XIX combatté il sultanato egiziano e gli Inglesi nel nome dell'Islam, era una tunica lacera risultante dalla cucitura di diversi brandelli di tessuto; essa mostrava tangibilmente l'attaccamento alla fede e la vita virtuosa ispirata agli ideali di libertà e uguaglianza dell'*jihad*. Diversamente però stavano le cose per l'uniforme di ufficiale che, molto curata, presentava applicazioni rettangolari di tessuti colorati e motivi decorativi in corrispondenza delle tasche e del collo con effetti di una certa eleganza. La distanza tra l'uniforme raffinata e la tunica primitiva è palpabile, ma lo stacco non è conseguenza della semplice cancellazione dell'ispirazione originaria, del tradimento delle *élites*, quanto il tentativo di comporre esigenze e linee di pressione contraddittorie; le necessità della guerra richiedevano la formazione di una struttura di comando efficace e visibile, il trionfo dell'uguaglianza domandava un paradossale sviluppo della gerarchia; di qui la nascita della nuova divisa che attraverso la citazione decorativa delle toppe usuali cerca di marcare contemporaneamente un'identità di appartenenza e una diversità di funzione, di far coesistere vecchio e nuovo, movimento e istituzione

#### Immagine 3 Jibbeh: tuniche di cotone dell'esercito mahdista del Sudan

##### Jibbeh: tuniche di cotone dell'esercito mahdista del Sudan

La tunica povera del soldato e la tunica di ufficiale. Lo *jibbeh*, uniforme sudanese degli ufficiali mahdisti, ce ne offre una illuminante testimonianza. Proprio alla massa dei seguaci di Muhammad Ahmed detto il Mahdi –profeta- che nell'ultimo ventennio del secolo XIX combatté il sultanato egiziano e gli Inglesi nel nome dell'Islam, era una tunica lacera risultante dalla cucitura di diversi brandelli di tessuto; essa mostrava tangibilmente l'attaccamento alla fede e la vita virtuosa ispirata agli ideali di libertà e uguaglianza dell'*jihad*. Diversamente però stavano le cose per l'uniforme di ufficiale che, molto curata, presentava applicazioni rettangolari di tessuti colorati e motivi decorativi in corrispondenza delle tasche e del collo con effetti di una certa eleganza.



## Tratti comuni dell'estetica africana

La possibilità di definire i caratteri generali di un'estetica africana si gioca fra i due estremi di chi nega, fuori dall'Africa, ma anche dentro l'Africa (es. la critica al panafricanismo delle élites culturali etiopi), agli africani la capacità di giudizio su culture estetiche e sensibilità artistiche che non appartengono alla propria cultura e chi invece interpreta i giudizi positivi sui contenuti artistici di altre culture come prova di una soggiacente e condivisa sensibilità estetica africana.

In posizione intermedia v'è chi ritiene che se gli Africani formulano giudizi espressivi sugli oggetti prodotti da altre culture non lo facciano a partire da un *corpus* proprio di valori panafricani, ma da criteri estetici locali, giudicando sulla base della prossimità al proprio gusto e non interrogandosi sul senso che tali oggetti possano avere nella cultura di origine.

### Arte moderna e contemporanea sudanese, Omar Kahiry, pittore

*The oldest and most consistent of Sudanese modern and contemporary art is the art of the tribes. The Sudanese tribal life has always been the least responsive to change. Art of the tribes of the Sudan shows great reservation and conservatism.*

*An art of such continuity clearly exposes the spirit of such tribal cultures. In fact the richness of the Sudanese art is in its diversity.*

*This entire heritage, past and present, constitutes the base on which the modern Sudanese artistic practices are deeply grafted. This is why Sudanese contemporary art, stands out among the different African schools of art as unique.*

*This entire heritage, past and present, constitutes the base on which the modern days of Islam in Sudan. It is traditional Qoranic School, which continued to exist from as early as the 9th century AD until the present day. It teaches art as a practice, but not as an objective. Yet its artistic impact on the Sudanese child seems to be important.*

*When the Turks invaded Sudan in 1824, Mohamed Ali Pasha, who was very keen on the modernization of the Nile Valley, introduced the Modern Elementary Education, yet he based the experience on the traditional (khalwa) school.*

*In 1936, a department of art education was established in Bakht-el-Rida Institute of Education. The department was headed by Jean Pier Greenlow a British artist and art teacher he went into history as the founder of the modern art movement in Sudan. Since the pioneering efforts of Greenlow in 1936, Sudanese art has in fact developed into a relatively strong cultural medium of expression.*

*The change came when some of the pioneer graduates of Gordon Memorial College went overseas for further studies. But they soon came to discover that the works of art could only exist between the old and new, between convention and revolution within a certain society. This is why some pioneer artists were culturally frustrated in Europe. They naturally failed to be part of the European mainstream art. They started to drift away from it, and began to try things on their own.*

*So the Sudanese artists returned to Khartoum to face their own culture and to practice art as a socio-cultural activity. The Sudanese contemporary society is complex, plural and draws from many different traditions and visual styles. Hence what was called latter (Khartoum School) in the 60s, was in fact a forum for the struggle to capture the spirit and perspective of, not only Africa but the Islamic World also. Because both worlds make the cultural reality of Sudan, a reality of unity and diversity.*

*Contemporary Sudanese art world did not experience a war of styles, or strong schools other than (Khartoum School). Nevertheless, there is a relatively strong art movement, which is highly experimental. In its own way this movement is modernist and seeking to globalize in spite of the rather restrictive conditions under which hundreds of Sudanese artists are working.*

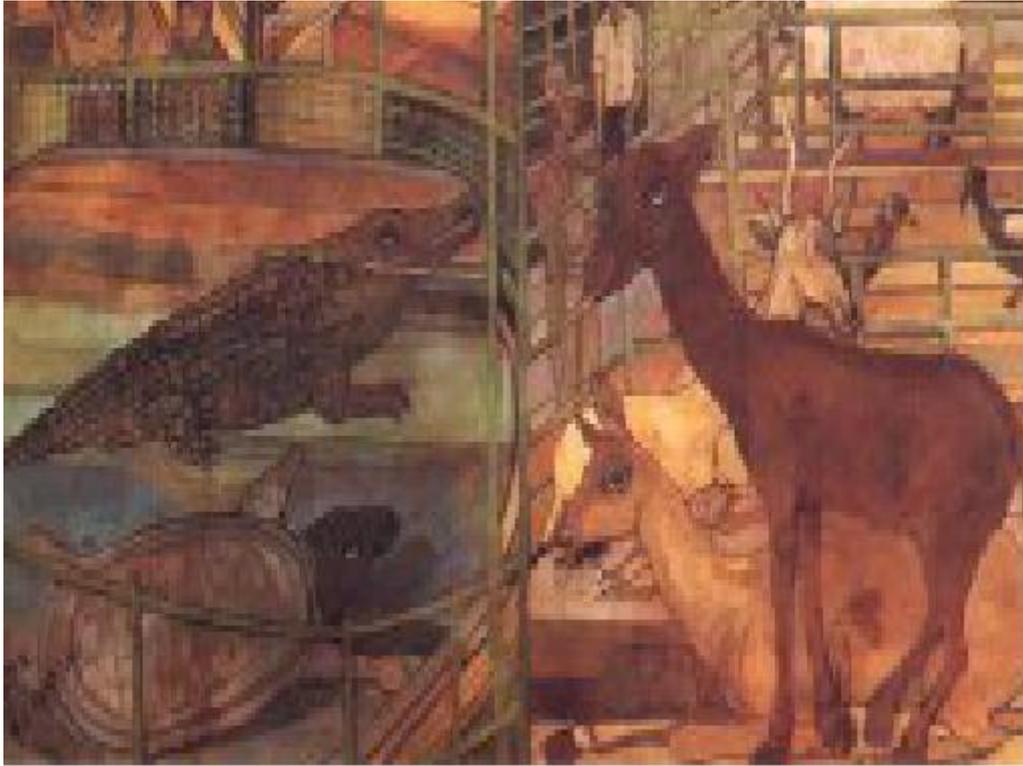


Immagine 4 Arte moderna e contemporanea sudanese, Omar Kahiry, pittore

### **L’Africa può presentare all’esterno un’unitarietà di stile *Made in Africa*?**

La ricerca di un’estetica africana sarà l’oggetto di una decisione e di una scelta degli interpreti del design: un’estetica africana non la si scopre, ma la si costruisce, in Africa, ma anche all’esterno, gli Africani con gli altri. L’estetica africana è il risultato di una strategia che isola i tratti comuni anziché le differenze.

Una volta accettata l’artificialità relativa dell’oggetto su cui verte l’analisi, l’Africa come costruzione interculturale, come correlato di uno sguardo esterno, ci sembra allora che se ne possa utilmente parlare riconoscendo francamente il proprio discorso come finzione. Non si tratta cioè di delineare un trascendentale estetico o una mentalità tipica, ma di stabilire dei nessi fra gli oggetti, quali possono apparire ad un fruitore esterno all’Africa. La sintesi cui si perverrà avrà una portata non causale ed esplicativa, ma retorica: non spiegherà la genesi del gusto estetico africano riportandolo ad un nocciolo comune, ma ritaglierà un percorso possibile, suggerirà un itinerario percorribile.

In dettaglio si può affermare che è nell’unità delle *performance* che appaiono le omologie che consentono di tratteggiare i caratteri generali di un’estetica africana, che attraverso le diversità degli stili e dei mezzi espressivi: nella festa, nelle ritualità, s’intrecciano sensazioni visive, uditive, tattili, olfattive, gustative, che trasposte in forme e colori fanno oggetti come parti di un più ampio complesso.

#### **Venditrice di tessuti, Dar Es Salam, Tanzania**

Immagini dal mercato



Immagine 5 Venditrice di tessuti, Dar Es Salam, Tanzania

### 3. La tradizione

**I designer africani si confrontano con un mondo all'esterno che spesso vede l'Africa come un vaso chiuso, nel quale tutto quello che è vero e puro è buono per i musei, tutto quello che è rivolto al mercato è *tourist artisan art*, o etnicismo**

Se l'approccio spazializzante pan-africano può avere chiarito le dinamiche dell'estetica africana in quanto sistema culturale e parte di un sistema sociale, rischia però di deificare le opposizioni e associazioni simboliche che rileva sottraendole ai processi storici e alle realizzazioni individuali entro cui compaiono. Il significato di un elemento infatti non deriva solamente dalla posizione che occupa in rapporto agli altri, ma anche all'uso strategico che ne fanno, in una pluralità di contesti, le persone che lo manipolano in vista dei fini che si prefiggono. Quindi è necessario fluidificare l'immagine unitaria tracciata prestando molta attenzione al tempo ed ai cambiamenti. La polarizzazione propria all'immaginario occidentale fra un'Africa vera sottratta al tempo e consegnata all'immemorabile, alle radici, all'inconscio, alla natura e un'Africa spuria, ridotta a periferia dell'Occidente, ha a lungo sottratto la capacità progettuale africana alla storia ed al mercato, relegandola nella ripartizione geografica degli stili etnici, per fare un esempio, come in Europa la cultura occitana e gaelica o gli albanesi di Puglia. Alla purezza delle origini si vede contrapposta l'arte tribale o la *tourist art*.

L'Africa sarebbe la vittima impotente di un processo di deculturazione che, annientando le società tradizionali, condurrebbe alla morte del fondamento culturale africano: la perdita del carattere comunitario, equilibrato, integrato delle società africane porterebbe con sé la crisi del vero senso estetico comune africano. L'artigianato seriale per turisti frettolosi ed i prodotti d'abbigliamento destinati al circuito internazionale delle catene distributive e del commercio equo e solidale non sarebbero che i due volti di una stessa lacerazione: la comparsa dell'altro condurrebbe all'alienazione dell'identità originaria africana nella massificazione e nell'individualismo.

Se nel caso dell'identità europea si fa dell'apertura all'altro una condizione della sua esistenza, e delle scarpe (es. Prada) sportive con suola di gomma ultratecnologiche vengono presentate come una discendenza diretta del gusto rinascimentale, quando si passa all'identità africana questa apertura sembra tradursi inevitabilmente in una perdita: derivazioni e prestiti si mutano in dipendenza e debito. Così uno storico dell'Africa come Trevor Roper, (riprendendo Hegel), poteva affermare con certa retorica ancora nel 1963 che "non c'è stata storia dell'Africa, ma solo la storia degli europei in Africa...il resto è tenebra...e le tenebre non sono il soggetto della storia...". Per gli europei ancora oggi l'Africa resta chiusa in un vaso, quando si apre al mondo non può fare altro che accogliere passivamente ciò che è stato inventato altrove. Un atteggiamento che in passato ha portato a negare l'africanità culturale ed estetica di quelle testimonianze, ad esempio forme d'arte, che sembravano troppo elevate per poter essere africane. Ad esempio il classicismo delle sculture di Ife, in Nigeria, portò l'antropologo tedesco Ferdinand Georg Frobenius all'alba del '900 a sostenere una derivazione etrusca, a corto d'argomenti logici e prove plausibili sul percorso di tale derivazione, rinnovò addirittura l'ipotesi di Atlantide che avrebbe contaminato in senso classico la cultura africana.

Insomma per l'Africa sembra ancora valere una concezione sostanzialista dell'identità: l'idea che l'originale o il medesimo e l'altro preesistano all'integrazione, che siano quello che sono in virtù di se stessi e non del rapporto che hanno l'uno con l'altro. L'identità della civiltà africana è così definita sulla base delle proprietà che ineriscono loro necessariamente. Infine mentre l'Occidente si lancia nelle tempeste della storia, all'Africa è affidato il compito di preservare il fondo archetipico dell'identità di cui è la culla.

**Palo funerario, Sakalava, Madagascar**

Nell'arte scultorea del Madagascar si sovrappongono influenze bantù e indonesiane



Immagine 6 Palo funerario Sakalawa, Madagascar

## La libertà d'espressione crea innovazione

Di questo contesto occorre che i designer africani tengano conto quando producono forme ed immagini destinate al mercato di consumo mondiale: spesso devono affrontare il mondo come i pesci che dall'interno di un acquario vogliono saltare fuori.

Essi devono evitare di cadere nella trappola di quanto più o quanto meno etnico sia il proprio lavoro, di quanto più originale o di quanto più contaminato sia il loro prodotto.

I designer devono tenere conto che anche le società africane non hanno mai vissuto in un limbo temporale. Come tutte le altre civiltà hanno carattere problematico e dinamico. Il lavoro di designer deve mettere in relazione il mito, il rito, ma anche la storia, ciò che permane e ciò che muta.

### Sedia, Luguru, Tanzania

Mentre lo sgabello ha una lunga storia in Africa, come testimoniano i reperti archeologici, la sedia è stata introdotta dal contatto con culture esterne



Immagine 7 Sedia, Luguru, Tanzania

## **La creazione artigiana in Africa si sviluppa tra individualità ed etnia**

*La tradizione fornisce l'ambito di ciò che è culturalmente accettabile , ma non agisce come una costrizione che s'impone alla libertà individuale*

Non è il peso inerte di un passato che incombe , ma un insieme di vincoli entro cui ci si muove; un insieme determinato di possibilità che continuamente si dilata e si contrae perché affidato alla cura dei singoli, alla loro interpretazione: da essi portato all'esistenza e mantenuto in vita ogni volta che un produttore artigiano sviluppa una forma.

D'altra parte, è bene rimarcare, se la tradizione non è poi così soffocante come si potrebbe pensare, è proprio perché non le si contrappone un'individualità che vorrebbe liberarsene. In realtà il problema dell'individualità, dell'originalità, dell'irripetibilità di culture e persone, della loro tutela e del loro sviluppo, si pone solo all'interno della nostra cultura in cui il rapporto individuo e società è pensato in termini di opposizione. Ciò che di volta in volta ci ha fatto vedere nell'arte africana l'espressione di una società spontanea e selvaggia, svincolata dalle convenzioni sociali e il suo contrario, una rappresentazione collettiva in cui gli individui sono ridotti a semplici esecutori. Fare della produzione africana un prodotto individuale non ha maggior senso che vedervi l'espressione immediata di un gruppo sociale omogeneo: l'identità relazionale della persona africana va piuttosto pensata in termini di partecipazione differenziata a una molteplicità di gruppi e situazioni.

Ad esempio in Etiopia, ad Addis Aababa Il settore della calzatura in città è dominato da un gruppo etnico, quello dei Dobe Gurages. I Dobees, un sotto gruppo all'interno del gruppo etnico dei Gurage, che provengono dalla zona di Butajira, nel Sud dell'Etiopia, dominano la maggior parte degli affari nel settore della calzatura a Merkato e in altre parti della città. Hanno il monopolio della produzione delle calzature a tutti i livelli dei sotto-settori. In alcuni cluster calzaturieri come Mesalemia, vi sono alcune diversificazioni, per cui altri gruppi convivono con i Gurage, e ad esempio i Sodo e altri gruppi etnici estranei ai Gurage sono anch'essi impegnati nella produzione di calzature. Nel principale cluster della calzatura, tuttavia, Shera tera, Merkato, la diversificazione è rara e molto evidente è la posizione di predominio dei Dobe. Per mantenere la preminenza di questo gruppo nel settore vengono usati dei metodi chiaramente rilevabili nelle assunzioni e nello svolgimento degli affari.

L'importanza che nel settore giocano i vincoli sociali costituisce uno dei mezzi per mantenere il dominio di un determinato gruppo. I legami sociali sono importanti per cominciare un'attività nel settore delle calzature, per trovare lavoro e per imparare il mestiere. La maggior parte dei produttori, ad ogni livello, solitamente impiega o membri del gruppo familiare o parenti. Di solito, coloro che sono rimasti più a lungo negli affari, prendono con sé familiari e parenti digiuni del mestiere, li assumono, li aiutano ad imparare le tecniche della produzione e del design delle calzature e li aiutano a mettere in piedi un loro proprio laboratorio. Partendo dal livello informale di produzione, fino ai produttori di medie dimensioni, la maggior parte delle imprese sono a carattere familiare e le assunzioni sono in genere limitate a membri della famiglia, parenti o comunque gente appartenente ai Dobe Gurages.

I legami di parentela o sociali non sono importanti solo per trovare lavoro o per mettersi in affari, ma sono fondamentali anche per avere accesso alla formazione specializzata nell'ambito del gruppo.

In un'intervista effettuata da alcune assistenti dell'università di Addis Abeba presso i produttori di calzature dell'area di Merkato, leggiamo di Z.D., artigiano calzaturiere, appartenente alla tribù dei Garage. Z.D., ora sessantaduenne, da quaranta anni è nel settore delle calzature. Prima di mettere su una propria impresa ha lavorato anche per dieci anni in una grande fabbrica di calzature. I sette figli del signor Z.D. sono pure divenuti esperti nella fabbricazione di calzature. Z.D. ha insegnato l'arte della calzatura sia ai maschi che alle femmine, di modo che potessero aiutarlo dopo la scuola. Oltre ai figli, anche alcuni parenti hanno appreso da lui le sue tecniche e tutti lavorano ora in modo indipendente.

Z.D. e la sua famiglia producono in un laboratorio molto piccolo, seduti su banchi o in piedi. Traendo beneficio dalla capacità creativa sinergica di tutti i componenti, il gruppo di artigiani è in grado di progettare e produrre calzature femminili in ambito wolkeso (espressione locale che indica calzature di basso costo). I disegni li prendono da scarpe che trovano sul mercato ed ai quali si ispirano. Affermano che il loro lavoro consiste nel competere per un ristretto mercato locale invaso da scarpe cinesi d'importazione, dove le calzature maschili sono sempre le stesse, mentre le scarpe da donna possono avere maggiore successo se sono personalizzate e diversificate.

La figura stessa del maestro artigiano, le forme della selezione, dell'apprendistato e della sua posizione in seno alla società variano enormemente da un luogo all'altro, ed in rapporto alle specializzazioni del gruppo di appartenenza. Se in certe situazioni la formazione avviene in modo informale e chiunque può divenire calzaturiere o pellettiere, o altro, (come accade per esempio in Etiopia fra i Garage, specializzati nelle piccole imprese di prodotti tessili e del cuoio). I maestri artigiani possono lavorare individualmente oppure essere riuniti in gruppi familiari, o caste, dedicarsi al lavoro a tempo pieno oppure solo in certi periodi in alternanza con il lavoro contadino, o nelle poche medie e grandi imprese. I prodotti sono acquistati spesso direttamente da coloro che ne fanno uso, ma difficilmente sono privi di un contenuto di moda.

I margini di autonomia del maestro artigiano variano enormemente in rapporto alle situazioni ed al tipo di oggetti, così come al loro contesto d'uso. La possibilità d'innovazione in particolare sembra che aumenti con sistemi di apprendistato anche informale. Questo anche nei casi in cui i committenti siano restii al cambiamento, oppure viceversa siano ben disposti all'innovazione secondo la moda, anche se inseriti in un rigido sistema di apprendistato teso a preservare la continuità stilistica (es. produttori di sandali tradizionali contaminati dalle forme di sandali sportivi).

#### **Immagine 8 Una donna Dorze fila a mano il cotone, Chench, Etiopia meridionale**

##### **Una donna Dorze fila a mano il cotone, Chench, Etiopia meridionale**

I Dorze sono famosi per la produzione di scialli (gabbis) di cotone



## 4. Le contaminazioni culturali

### L'Islam nero

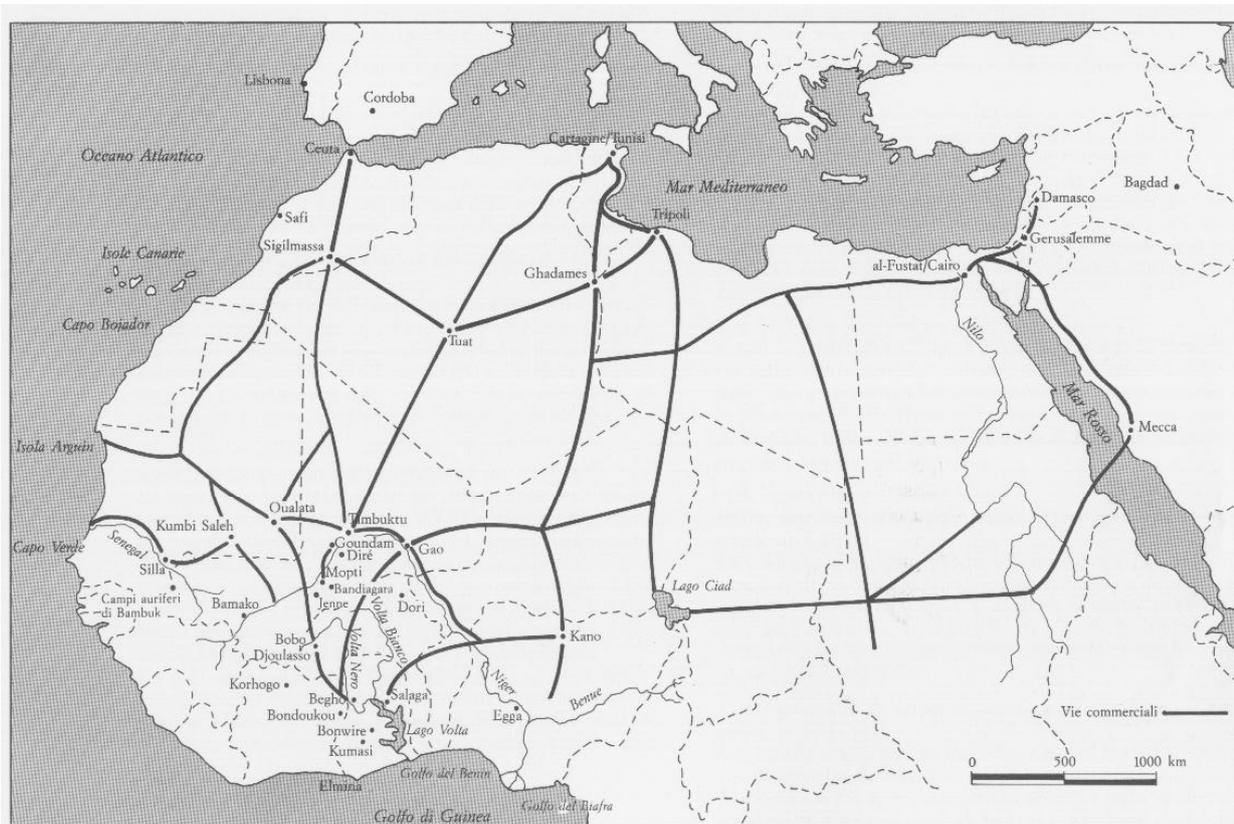
La presenza della civiltà islamica in Africa non è cosa recente: gran parte dell'Africa a nord delle foreste equatoriali e a est della Rif Valley ha conosciuto l'Islam da più di mille anni. All'islamizzazione del Maghreb ad opera degli Almoravidi nell'VIII secolo faceva seguito un secolo più tardi la loro penetrazione nel Corno d'Africa (concomitante con l'islamizzazione del Sahara) con l'insediamento di mercanti arabi provenienti dallo Yemen. Il prestigio dei commercianti arabi che portavano merci pregiate, il potere attribuito alla magia islamica, il fascino esercitato dalla scrittura come modo di comunicazione tra gli uomini, sembrano essere stati i motivi alla base di molte conversioni. Il carattere sincretico del politeismo e la presenza di un certo substrato culturale condiviso ne hanno garantito il successo. Così è potuto accadere che nella lotta contro il colonialismo l'Islam sia stato spesso inteso come parte della resistenza africana contro lo straniero.

Una coabitazione di lunga data che ha dato luogo alla formazione di comunità multiculturali integrate composte da musulmani e politeisti, civiltà che hanno fatto dei confini ecologici, culturali, religiosi, economici il loro terreno di sviluppo.

#### Immagine 9 Principali vie commerciali transahariane dal IV al XVIII secolo

##### Principali vie commerciali transahariane dal IV al XVIII secolo

Vie commerciali lungo la fascia sahelica, dall'ovest all'est dell'Africa, in collegamento con il Mediterraneo



## La cultura swahili

La cultura swahili nasce sulle coste africane sull'oceano Indiano, laddove le correnti monsoniche stagionali portavano le migrazioni arabe, persiane e indiane e consentivano la nascita di un fiorente commercio intercontinentale. Una società mercantile e urbana che aveva le sue basi nell'apporto arabo-islamico, ma che si innesta su una preesistente cultura africana. Proiettata all'esterno conobbe il declino con i portoghesi nel XVI secolo.

Nella lingua e nella cultura swahili che ha il suo apogeo nel XV secolo, elementi arabi e bantu si concorrono a realizzare una società urbana ed economica e mercantile affine a quella asiatica, soprattutto indiana.

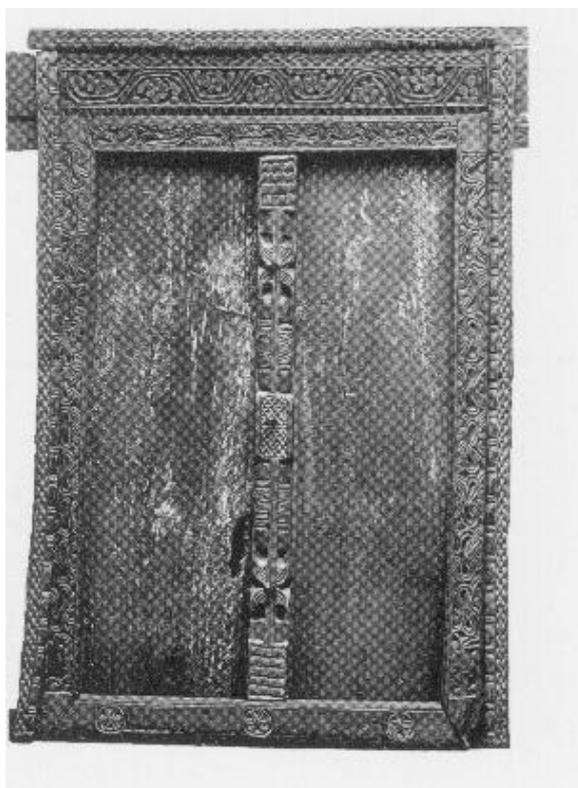
L'originalità di questa cultura ancora presente si può rilevare ad esempio nelle sedie *kita ka enzi* (sedie del potere) che hanno contaminato anche modelli europei, ad esempio nelle versioni esotiche dell'ottocento, prodotte dai colonizzatori inglesi. Interessante è anche l'altra ipotesi evocata per spiegare la genesi di queste sedie, che pur rintracciando una differente origine, delinea anch'essa un reticolo d'influenze ad ampio raggio: realizzate a partire dal XVI secolo, ispirandosi a modelli egiziani, sarebbero poi state portate negli Stati Uniti da viaggiatori commercianti americani nella seconda metà dell'ottocento dove sono conosciute come sedie dei battelli del Mississippi.

### Immagine 10 Porta Swahili, Tanzania

#### Porta Swahili, Tanzania

Porta in legno della Tanzania. Dalla tradizione delle porte scolpite del XIX secolo.

Sull'intelaiatura ed il pilastro centrale dei due battenti compaiono motivi locali, quali la palma, il dattero, il moto ondoso e l'albero dell'incenso, e altri di derivazione indiana, quali le rosette ed i fiori di loto.



## Il colonialismo

***La scoperta dell'oro americano e le esigenze della tratta degli schiavi mutarono le cose. Nella percezione europea l'Africa divenne allora luogo comune di barbarie, immagine di un'umanità corrotta.***

Della cultura di provenienza indo-arabo-afro-portoghese si dimentichò tutto, e si riclassificò qualsiasi manufatto come europeo, o turco o indiano, insomma sempre e solo esterno.

Nel XIX secolo il colonialismo europeo assume i tratti dell'occupazione territoriale e con la conferenza di Berlino del 1885 l'Africa venne ridisegnata sulla base di una nuova geografia politica. Fanno la loro comparsa i confini politici e amministrativi che ne sanciscono la spartizione tra le potenze europee e tracciano nuove coordinate del loro sfruttamento economico.

La geografia mercantile aveva privilegiato i margini costieri e quando si era spinta all'interno aveva seguito gli assi fluviali o qualche breve via di comunicazione terrestre: il suo era un territorio fatto di poche linee note e di grandi spazi ignoti. Sulla base delle nuove esigenze amministrative dello spazio questa complessità geografica indeterminata diventerà un vuoto da colmare. La cartografia, con il suo sforzo di denominazione totale, risponderà allora a questo desiderio di costruire uno spazio utile trasparente nel quale sia impossibile perdersi.

In questo processo di ricostruzione dello spazio africano le strategie di denominazione registrano un significativo spostamento di accento: nel passaggio dal colonialismo mercantile a quello territoriale la toponomastica religiosa e simbolica perde terreno mentre avanza quella scientifico classificatoria. Si tratta di una razionalità che risponde ad un principio di economia: invece di sostituire i nomi locali con quelli cristiani, si utilizzano quelli locali e li si estendono investendo energie per nominare quella gran mole di elementi spaziali sconosciuti dai saperi locali.

Tutto qui, molta dell'etnicità di cui si pretende di essere a conoscenza prende forma dalla bizzarria o fantasia dei cartografi coloniali europei.

Con il colonialismo tutto deve essere denominato e collocato esattamente. I flussi migratori usuali sono bloccati e la gente è fissata entro spazi arbitrariamente definiti dando luogo a quel processo di segmentazione etnica che ha portato alla tribalizzazione dell'Africa contemporanea.

Anche in questo caso, nonostante la violenza della dei cambiamenti, gli africani non sono passivi all'imposizione pura e semplice di un ordine esterno. Se spesso gli europei equivocarono e, credendo che gli africani fossero divisi in tribù, introdussero di fatto un elemento esogeno, furono però gli africani stessi, per ridefinire nuovi equilibri di potere, a costruire le tribù alle quali si supponeva appartenessero.

In questo processo di costruzione guerreggiata e negoziata di nuove identità l'Africa orientale gioca un suo ruolo specifico.

In molti casi ed in particolare con il sistema britannico dell'*indirect rule*, l'occidente occupatore non ha distrutto le tradizioni africane con un attacco frontale, ma le ha riformulate in modo unitario e sistematico, epurandole di quelle ambiguità e contraddizioni tipiche delle società aperte e che le rendevano plastiche e mobili e irrigidendole negli schemi di un folklore coerente e controllato.

Il feticismo del passato e dell'autenticità (il mito dell'Africa vera e pura) ne saranno il prodotto: il contraltare nostalgico della modernità che si persegue e mai si raggiunge è paradossalmente la filosofia di base della eticità del gusto africano quale lo percepisce ancora oggi in Europa, o meglio in tutto l'Occidente sviluppato.

Le risorse umane che compongono oggi una rinnovata generazione di artigiani capaci derivano dalla fissazione territoriale entro lo spazio mentale chiuso del villaggio che si è sviluppato di pari passo con la migrazione economica verso le città.

La territorializzazione delle culture africane e l'esperazione dei particolarismi conservatori vanno di pari passo con l'intensificarsi della globalizzazione che le immette in un sistema di relazioni internazionali.

Gli africani sono arruolati nelle truppe coloniali ( ad esempio gli eritrei carabinieri dell'Italia) per combattere le guerre europee in tutto il mondo e di ritorno in Africa i reduci portano i ricordi di paesi lontani. Ad esempio la diffusione dei *batiks* indonesiani (Giava) in Africa, commercializzati dagli olandesi e poi riprodotti industrialmente dagli inglesi, ha avuto come punto d'avvio i soldati africani che tra il 1810 ed il 1862 avevano combattuto in Indonesia e avevano portato in regalo dei tessuti batik.

Dai paesi asiatici provengono non solo prodotti commerciali, ma anche nuove forme estetiche legate anche alle religioni. Ad esempio la presenza di mercanti indiani sulle coste dell'Africa orientale, in particolare a partire dalla prima guerra mondiale, ha come conseguenza la diffusione di elementi rituali di origine indù: immagini religiose e testi sacri, incensi, profumi, i colori indù sulla fronte e gli accessori tipici di quella cultura.

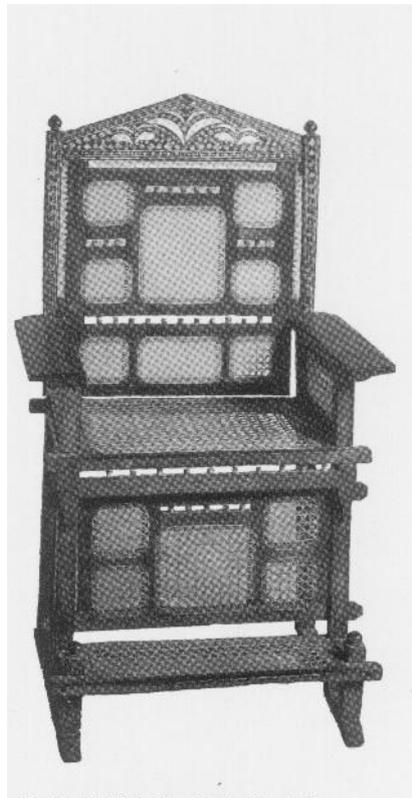
Fra i culti di tendenza indiana, il più conosciuto in tutta l'Africa subsahariana, dal Senegal a occidente alla Tanzania a oriente, è il culto di *Mami Wata.*, indicato in inglese in Kenya con il nome di *Mother of Water*, in cui in modo sincretico si intrecciano riti e immagini di origine africana, indù e europea.

#### Immagine 11 Sedia Kiti Cha Enzi, Swahili, Tanzania

##### Sedia Kiti Cha Enzi, Swahili, Tanzania

Sedia di legno, avorio e corda.

Modello coloniale di sedia anglo indiana da campagna



*In particolare negli elementi per l'abbigliamento si sviluppano fitti scambi e tessuti e cuoio divengono uno dei mezzi principali attraverso cui si allacciano e intrecciano relazioni commerciali e culturali fra Africa, Occidente e resto del mondo.*

La competizione non si svolge tanto con i prodotti di fattura europea quanto con le imitazioni europee dei tessuti africani.

Se nello scritto, racconti di viaggio, rapporti di militari coloniali, e missionari, l'immagine europea dell'Africa appare spesso legata in modo fortemente etnocentrico ai *clichés* letterari dell'Africa nera o madre Africa, sulla superficie e nella trama dei tessuti possiamo leggere la volontà europea di fare dell'Africa un mercato per l'industria tessile europea costringendo imprenditori e commercianti ad immedesimarsi nella mentalità e nel gusto africani per la produzione di tessuti adatti

A livello popolare la ripresa apparentemente caricaturale della panoplia del potere coloniale univa all'appropriazione magica dei segni la critica e la satira della società coloniale e l'espressione della conflittualità: in Kenya le associazioni di danza che proclamavano la propria fedeltà alla corona inglese sfilavano contrapponendosi agli infidi scozzesi in Kilt e cornamusa.

## Immagine 12 Riempieskoene, calzature boere

### Riempieskoene, calzature boere

Usavano calzature a strisce di cuoio dette Riempieskoene .

I boeri erano coloni d'origine olandese che, dopo lo sbarco al Capo di Buona Speranza, nella seconda metà del 1600, dove i Paesi Bassi avevano creato una base di rifornimento per le loro navi, si inoltrarono nell'interno sottomettendo e facendo schiavi gli Ottentotti autoctoni della regione ed entrando anche in contrasto con i Bantù. A seguito della conquista di quei territori da parte degli Inglesi nel 1795, dato che quel governo favoriva ovviamente i coloni anglosassoni ed aveva abolito la schiavitù nel 1834, decisero di inoltrarsi verso l'interno con un movimento di migrazione di massa onde cercare nuovi e liberi territori dove vivere secondo le loro tradizioni. Si spostarono su carri trainati da buoi con le loro famiglie e fondarono gli stati indipendenti dell'Orange e del Transvaal.

TheGreatTrek

Pagina 1 di 6



#### The Great Trek

The Great Trek was a movement of Dutch-speaking colonists up into the interior of southern Africa in search of land where they could establish their own homeland, independent of British rule. The determination and courage of these pioneers has become the single most important element in the folk memory of Afrikaner Nationalism. However, far from being the peaceful and God-fearing process which many would like to believe it was, the Great Trek caused a tremendous upheaval in the interior for at least half a cent

#### The Voortrekkers

The Great Trek was a landmark in an era of expansionism and bloodshed, of land seizure and labour coercion

## **Il Cristianesimo in Africa**

***Il cristianesimo, come l'islam, è presente da lunga data sul territorio africano ed ha finito anch'esso con il raccogliere sotto l'apparente univocità del termine una grande varietà di credenze religiose, e pratiche rituali, e forme organizzative.***

Dalle differenti confessioni trapiantate sul suolo africano alle chiese protestanti e anglicane indipendenti, per un totale oggi di circa settemila chiese e movimenti religiosi.

Il suo arrivo in Africa occidentale è della metà del XV secolo, ma nell'Africa orientale è già presente sin dal primo secolo D.C., Egitto e Tunisia a nord, e nelle attuali Ethiopia e Sudan nell'Africa subsahariana orientale.

Una forma estetica cristiana è quindi presente fin dagli albori del cristianesimo, come in Europa e parallelamente agli sviluppi in Europa, fin dall'impero dei romani (romano d'oriente), come nel caso dell'arte copta e dell'ortodossia etiope.

Il rapporto che il cristianesimo ha intrattenuto con le culture africane mostra ambiguità simili a quello dell'islam, e riflettono la percezione contraddittoria che ha avuto l'Europa di queste terre. Il rapporto che il cristianesimo ha intrattenuto con le popolazioni africane ha storicamente oscillato fra due paradigmi: quello del politeismo come aberrazione e quello del politeismo come presentimento, che attende e cerca il proprio completamento nella rivelazione.

Prospettive diverse che hanno caratterizzato diverse soglie di tolleranza e accettazione della diversità culturale ed estetica delle popolazioni africane.

Il cristianesimo, più dell'islam, ha portato in Africa una ventata iconoclasta, ma ha anche incentivato il rinnovamento della produzione dell'estetica figurativa tradizionale anziché condurla verso la fine. Se il protestantesimo, per la sua reticenza nei confronti della rappresentazione sacra ha agito sostanzialmente da freno, il cattolicesimo e l'ortodossia con il culto delle madonne e dei santi e la ricca tradizione figurativa ha invece consentito il trapasso dell'estetica africana entro la nuova religione offrendo nel contempo e suo malgrado anche molteplici punti d'ancoraggio al sincretismo delle religioni locali

***Il villaggio cristiano raccoglieva per lo più afro-americani o afro-europei che venivano collocati in contesti del tutto estranei alle loro culture d'origine.***

Spesso in questi afro-occidentalizzati prevalse il senso di estraneità culturale all'Africa con la tendenza a costituirsi come corpo separato e a fare della fede cristiana un elemento di distinzione sociale più che di una dottrina da diffondere.

Quindi l'affermazione delle Chiese indipendenti è stata, più che una rivincita dell'Africa profonda contro l'acculturazione, l'espressione del suo inserimento nelle correnti della mondializzazione, la rivendicazione della propria particolarità si concretizzò nella nell'assunzione dei riti e della mentalità del fondamentalismo cristiano americano del profondo sud, incluso il gusto estetico semplice e di campagna.

Anche la Chiesa anglicana introduceva in Africa le feste del raccolto e le processioni dei campi che le erano servite già in patria per creare uno spirito comunitario contro le tensioni che agitavano le campagne, mentre la Chiesa cattolica a sua volta disciplinava la proliferazione dei culti e degli altari, erigendo le sue copie di Fatima e di Lourdes e incanalando i pellegrini nei pochi santuari del culto mariano autorizzato, secondo lo schema sperimentato in Europa.

### Immagine 13 Scultura Ujamaa, Kenya

#### Scultura Ujamaa, Kenya

Scultura makonde in legno ebano degli anni '50 con influenze portoghesi, indiane e dei missionari.

Rappresenta l'albero della vita, dal progetto socialista africano del presidente della Tanzania Nyerere, in armonia con l'ideologia del villaggio diffusa dalle missioni cristiane dal colonialismo protestante



#### ***La tradizione etiopica fa discendere la stirpe reale dei negus dall'amore tra la regina di Saba e il mitico re d'Israele Salomone.***

Hailè Selassié stesso, ultimo negus etiopico, sarebbe stato il duecentoventicinquesimo discendente diretto di Menelik, leggendario figlio di Saba e Salomone.

Corano, Vecchio Testamento e Nuovo Testamento parlano della visita della regina di Saba alla corte di Salomone. E' probabile quindi che non si tratti di pura leggenda, ma che ci sia un fondo di cronaca. Come personaggi storici i capostipiti sarebbero vissuti tra il 1000 e il 950 a.C.

Secondo la tradizione Saba curiosa di vedere il ricco regno a nord di cui si favoleggiava a corte, organizzò un viaggio. Venne accolta trionfalmente da Salomone che se ne innamorò. Tornata ad Axum Saba ebbe un figlio Menelik. Quest'ultimo si recò adulto da Salomone. Il padre gli fece conoscere i rappresentanti delle dodici tribù di Israele e gli anziani di Israele. Menelik aveva però un sogno: fondare ad Axum una seconda "Sion". Con un gesto spettacolare trafugò l'Arca dell'Alleanza (la cassa che conservava le Tavole dei Dieci Comandamenti). Il trasferimento dell'Arca è all'origine della tradizione della Chiesa copta. La leggenda di Saba e Salomone ha conferito inoltre legittimità divina alla dinastia millenaria dei negus.

Giuliano, ambasciatore dell'imperatore bizantino Giustiniano, fu testimone stupefatto della grandezza del regno di Axum. In Etiopia ancora oggi vige il calendario giuliano. La potenza di Axum, agli inizi del VI secolo d.C., era immensa. Da secoli il regno axumita dominava le rotte mercantili fra l'Africa e l'Oriente, rivaleggiando con la Persia. Adulis (antico porto nei pressi dell'attuale Massawa) divenne un passaggio obbligato per le carovane d'avorio, di incenso e di mirra.

L'equilibrio della tensione fra cristiani dell'altopiano e mussulmani dei bassopiani fu frantumato da una devastante "guerra dei trent'anni". Il sultano Ahmed Ibn Ibrahim, signore di Harar si rifiutò di pagare il tributo annuale ai negus abissini. Mosse un esercito di somali e dancali dotati per la prima volta di armi da fuoco fornite dai turchi seminando il terrore per dieci tra gli etiopi. Solo nel Tigray gli etiopi resistettero all'avanzata musulmana. Nel 1535 Ahmed attaccò Axum e in breve tempo si spinse sino alle sponde del lago Tana. Nello stesso periodo altre potenze (Turchia e Portogallo) si avvicinavano.

La chiesa etiope-ortodossa domina la vita religiosa del paese sin dal quarto secolo, quando due fratelli di Tyre iniziarono a evangelizzare l'Etiopia con la benedizione del re. La chiesa etiope-ortodossa fa parte della chiesa copta, che ha sede ad Alessandria. L'ortodossia etiope ha una forte tradizione monastica e fino alla rivoluzione marxista vi era una congregazione di ecclesiastici in quasi tutte le città del paese. L'ortodossia unisce la più tradizionale fede cristiana in Dio, nei santi cattolici e in Gesù (benché l'enfasi sul Vecchio Testamento sia maggiore rispetto a molte religioni occidentali) alle credenze più tipicamente africane negli spiriti e nei demoni - le funzioni religiose includono spesso danze, previsioni astrologiche e pratiche di chiromanzia. I credenti osservano il digiuno ogni mercoledì e venerdì, evitando la carne, i latticini e talvolta anche il pesce.

La letteratura è tradizionalmente cristiana: i primi scritti in Ge'ez sono traduzioni di opere greche cristiane. La produzione letteraria in Ge'ez decollò nel XIII secolo, quando una grande quantità di opere religiose copte, siriane e greche vennero tradotte dall'arabo. Circa due secoli dopo, gli scrittori Ge'ez si cimentarono nelle prime opere originali, iniziando dalla vita dei santi per poi proseguire con libri apocalittici come la 'Spiegazione di Gesù' e il 'Mistero del cielo e della terra'. L'amarico subentrò al Ge'ez intorno al XVI secolo e ancora una volta gli scrittori si concentrarono soprattutto sulla traduzione di opere religiose. Fu solo dopo la fine della seconda guerra mondiale che gli scrittori amarici svilupparono altre tematiche: Makonnen Endalkaches, Kebede Mikael e Tekle Tsodeq Makuria sono tre famosi scrittori postbellici che hanno approfondito i temi della moralità e del patriottismo.

L'architettura del periodo cosiddetto "paleoetiopico" (ultimi secoli prima di Cristo - sec. VII d.C.) è caratterizzata da costruzioni massicce la cui funzione non è stata ancora chiarita (religiosa, civile o funebre). Rovine di edifici di questo periodo, raggruppabili in tre tipi fondamentali per pianta, orientamento e disposizione degli ingressi, si trovano ad Axum, Debarwa, Tokhondà, Adulis, Agulà, Qohaitò. Nel campo della scultura figurata rare sono le statuette a tutto tondo (piccole sfingi, figure umane sedute, animali in pietra e in bronzo), più comuni i bassorilievi (*Leone e leonessa* scolpiti sulla roccia presso Axum)

Nel periodo cosiddetto medievale (secc. VI-XVI) si sviluppò un'arte cristiana schiettamente etiopica. In seguito all'espansione musulmana il centro politico e culturale si spostò da Axum verso sud, prima nel Lasta poi nel Sawa. Le forme più caratteristiche dell'architettura di tale periodo sono le chiese monolitiche ipogee del Lasta, con archi a tutto sesto, volte a botte, cupolette, decorazioni a stucco e a fresco (chiese di Lalibèlà). Allo stesso periodo risalgono anche chiese rettangolari in muratura con pareti a fasce alternate di pietra e legno (chiesa del convento di Debra Damo nell'Agamè, ca secc. VI-X). Un terzo tipo è rappresentato dalle chiese, pure rettangolari e in muratura, ma senza fasce alterne, dell'E. settentrionale (nuova chiesa di Syon ad Axum; Endà Giyorgis a Feremena; chiesa di Asmara). Della scultura del periodo medievale si conservano soltanto bassorilievi, soprattutto su pietra (facciata di Maryàm a Lalibèlà; *Deposizione* e nove *Santi* nella chiesa di Golgotà; *Evangelisti* del tabernacolo nella cripta di Sellassiè, sempre a Lalibèlà), ma anche su legno, come le 33 formelle con decorazioni zoomorfe e geometriche del soffitto a cassettoni nell'antivestibolo di Debra Damo. La produzione pittorica, che inizia in epoca cristiana, comprende sia dipinti ornamentali sia grandi figurazioni di soggetto sacro, per lo più a fresco. Rare le icone dipinte a tempera su legno, mentre nel campo della pittura parietale va ricordata la tecnica della tempera su tela incollata alle pareti. Più tarda, ma assai raffinata, è la tradizione della miniatura. I manoscritti più antichi (sec. XIV) riflettono l'influenza asiatica

(siro-mesopotamico-armena) nell'iconografia e quella copta nell'ornamentazione, etiopico è invece lo stile.

Il periodo moderno dell'arte etiopica, che si fa iniziare nel sec. XVI, corrisponde alla progressiva decadenza e alla penetrazione, sia pure in aree e in periodi ristretti, dell'influenza europea (soprattutto portoghese nel secondo Cinquecento e nel primo Seicento, attraverso i Gesuiti). Le invasioni dei Galla, provenienti da sud, determinarono un nuovo spostamento della capitale verso nord, a Gondar. Le costruzioni di questo periodo (caratteristici i castelli, probabilmente portoghesi, di Gondar) sono per lo più di esecuzione straniera e presentano caratteri europei o europeo-orientali (chiesa a due piani di Martùla Maryàm nel Goggiam). L'influenza europea divenne determinante a partire dalla fine del sec. XIX; dopo il 1936 le maggiori città ricevettero piani regolatori a opera di architetti italiani.

#### **Chiesa di Debre Birthan Selassie, Gondar, Etiopia**

I dipinti che decorano il soffitto della chiesa



Immagine 14 Chiesa di Debre Birhan Selassie, Gondar, Etiopia

## **5. Globalizzazione: deculturazione o nuove strategie?**

**Le discontinuità laceranti conseguenti all'inserimento dell'Africa nel sistema capitalistico mondiale non possono essere in alcun modo sottovalutate, ma sarebbe tuttavia sbagliato vedervi semplicemente il disincanto del mondo africano sotto i colpi della razionalizzazione portata dalla modernità.**

La condivisione superficiale dei *gadets* della società industriale ricopre il perdurare di differenze profonde tanto economiche che culturali.

Il processo di occidentalizzazione del mondo non sembra produrre l'eclissi delle storie e dei gusti specifici locali e allo stabilirsi di una monocultura, economicismo, utilitarismo e individualismo che guadagnano terreno, ma sono lungi dall'avere il dominio totale del gusto e degli stili di vita.

I modelli di sviluppo basati sull'assimilazione culturale sono falliti non meno delle utopie relativistiche che mirano alla preservazione di una fantomatica identità originaria. La globalizzazione dell'economia estende contatti e contaminazioni, ma non dà luogo ad alcuna cultura o società globale: inasprisce le disuguaglianze sociali e materiali e non produce un nuovo senso comune. Le differenze nel bene e nel male si amplificano ed il gusto estetico di ogni luogo segue questa diversificazione.

**L'orizzonte che si profila non appare rigidamente uniforme: spezzoni di tradizione passate si compongono in modo instabile e precario con i portati della modernità per dar luogo a nuove e molteplici identità.**

L'eclittismo post-moderno, con la sua pratica della rivisitazione nello spazio e nel tempo trova consonanza nei *bricolages* tanto in Africa che nel resto del mondo: le identità ora si costruiscono e si esprimono assemblando materiali eterogenei e compositi.

E tuttavia le analogie non possono nascondere le differenze profonde: Africa e Occidente s'incrociano per poi procedere per vie che divergono.

Nelle società opulente la costruzione dell'identità procede per mode e maschere, travestimenti intercambiabili e dalla durata effimera; in questo quadro l'accettazione della altrui si accompagna spesso alla sua banalizzazione; la **moda etnica** muove alla ricerca di sempre nuove ed epidermiche sensazioni riducendo i simboli a simulacri, non produce un senso, ma cela il vuoto; l'estetizzazione della vita altrui sembra così svolgere in Occidente una funzione ottundente, anestetica: la maschera che non rivela, ma nasconde.

Nella società africana invece una sofferenza ed un dolore che non ammettono cosmesi contribuiscono forse a mantenere un maggior radicamento dell'esperienza corporea ed alla terra, quella vissuta e quella sognata.



**Il flusso di merci, capitali e informazioni innesca processi di deterritorializzazione che annullano le distanze spazio temporali , ma approfondisce anche la distanza di chi non ha accesso a queste risorse.**

La marginalità dell’Africa rispetto ai circuiti economici e alle strategie geopolitiche è nota, ma questo apre anche spazi di autonomia creativa. Ad esempio, se l’Africa è divenuta la discarica dell’Occidente (vi si esportano tecnologie obsolete, lavorazioni di montaggio semplici e lontane dalla gestione complessiva dei prodotti a cui si riferiscono, medicinali scaduti, scarpe e vestiti usati, scorie e rifiuti e così via elencando) è anche vero che su questa spazzatura e saperi incompleti sono nate nuove forme di economia, prima marginale, ora non più tanto ai livelli locali (si stima che in Etiopia l’economia informale rappresenti il 60% dell’economia nazionale), tanti lavori e produzioni che consentono a molte persone di sopravvivere ed in qualche modo progredire. Quello che una società spinge ai margini un’altra lo reintegra, strappandolo dalla terra di nessuno delle discariche reali e virtuali. Riciclati materialmente e simbolicamente questi rifiuti diventano risorsa, dove i resti del prodotto industriale e di consumo si mutano negli ingredienti di un manufatto utile ed esteticamente elaborato.

## **Project idea: “Made in Africa” fashion style and design for leather products**

### **Recommendation:**

*The project proposes to bring leather products, that in modern style and design are expression of African own cultural patterns and traditions, to international niche markets, making the most of the indigenous creativity and at the same time opening marketing channels for small entrepreneurs and artisans. To be implemented in Kenya – on a pilot basis - in close cooperation with the Eastern and Southern Africa Leather Industry Association (ESALIA), the project will develop a regional centre for developing an African fashion style and design for leather products and for training African designers.*

### **Background:**

Fashion trends are not precise indications supplied by few international experts. They are the translation of several socio-cultural factors into indications of style. They start therefore from life style and social desires which are transformed into colours, lines, shapes and materials. These trends are generally dictated by the cultural context of affluent markets and exporters in developing countries strive to adapt their products to them. *There is, however, in the major importing markets, a growing awareness of the importance of items that incorporate the cultural diversity and richness of our time.*

Openness and capacity to accept complexity and change characterizes the African art and aesthetics of today, which maintains anyhow its roots in the cultural specificity of the continent, in its capacity to portray its special vision of the world and of life also on the basis of strong and rich regional identities. This is an asset to be carefully exploited in the field of fashion, provided that it is blended with the trends of international fashion and international quality standards.

### **Basis for recommendation:**

1. *African designers bring their creativity into fashion products that respond to international demand, while maintaining the African identity; design is one of the key factors of successful business in leather products*
2. *African producers become aware of being doers of change and not only followers of external models, by proving the capacity of developing and marketing an African genuine collection of leather products;*
3. *Generate income of small entrepreneurs and artisans and foster their participation in exports;*
4. *Create a demonstration and emulation effect, towards the development of an African fashion leather industry.*

### **Proposed implementation plan:**

The project will work with the Kenyan leather industry and that of additional three selected countries.

- Analysis of the potential of the focus country in terms of materials, cultural patterns, productive and design capacities;
- Assessing the market for the country involved in order to define appropriate marketing and product mix;
- Outlining a line of design for a collection “made in” the selected country;
- Defining a marketing communication plan and realizing an integrated collection of leather goods and shoes to be produced by a selected sample of companies and artisans;
- Marketing the collection through selected distribution channels, domestically (tourism market) and internationally (agreement with franchising chain)
- Sharing the findings of the experience with a wider number of companies and artisans.

It is foreseen to involve from the outset of the project an international “brand name” in the leather product sector as a tutor and testimonial for the new African product collection.

The project, which will help developing the understanding and capacities in design, quality and marketing, will be implemented in close cooperation with the TPCSI<sup>1</sup> training centre (Thika, Kenya), which will ensure coordination, sustainability and multiplying effect, under the purview of ESALIA. TCPSI strengthens its capacity of a regional African designers will develop their skills by working closely with international designers.

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<sup>1</sup> <http://www.africaleather.com/tpcsi/main.htm>

Small entrepreneurs and artisans will be the ultimate beneficiaries. Special attention will be devoted to the latter to help them emerging from the informal sector through participation in export consortia.

**Timing: 24 months**

**Costs:**

The total budget is calculated at €uros 600,000 (including support costs).

This amount covers: international and national expertise (design, training and marketing), production of promotional materials and organization of promotional events, study and marketing tours, and participation in exhibitions.

**Success criteria:**

Quantitative: Value of marketed products; medium-term distribution agreements signed

Qualitative: Documented appreciation by customers