19 June, 2021 | Dar es Salaam

Linkages Between **Special Economic Zone** Investments and the Local Economy

EPZA

UONGOZI Institute

UNITED NATIONS UNIVERSITY
UNU-WIDER

UONGOZI Institute

'Uongozi' means leadership in Kiswahili, and inspiring and strengthening leadership is the core purpose of our organisation. Established in 2010 by the Government of Tanzania, UONGOZI Institute is dedicated to inspiring and equipping Tanzanian as well as African leaders to deliver inclusive and sustainable solutions for their nations and for Africa.

We apply a holistic and mutually reinforcing approach to capacity development which recognises that leadership competencies are developed through a continuous, lifelong learning process. Our two strategic pillars – leadership and sustainable development – are addressed through four main areas: executive education, policy dialogues, action-oriented research, and technical support. Our clients include organisations as well as individuals from the public sector, private sector, and civil society.

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List of Abbreviations

ACFTA	-	African Continental Free Trade Area
AIPs	-	Agro-industrial parks
BEZ	-	Border economic zone
CCM	-	Chama Cha Mapinduzi (the ruling political party in Tanzania)
CEO	-	Chief Executive Officer
GGP	-	Green Growth Platform
EAC	-	East African Community
EPZ	-	Export Processing Zone
EPZA	-	Export Processing Zones Authority
LGAs	-	Local government authorities
MSMEs	-	Micro-, small and medium-sized enterprises
OSSC	-	One-stop-service centre
PPPs	-	Public-private partnerships
PSD	-	Private sector development
SADC	-	Southern African Development Community
SEZ	-	Special Economic Zone
SMEs	-	Small- and medium-sized enterprises
TGC	-	Tooku Garment Company
TZS	-	Tanzanian shillings
URT	-	United Republic of Tanzania
USD	-	United States dollars
VAT	-	Value-added tax

Executive Summary

Tanzania aims to become a semi-industrialized, middle-income nation by 2025. The expectation is that industrialization will boost economic growth, create jobs and improve living standards. Over the last ten years, one key strategy to promote industrialization being implemented by the Tanzanian Government is the establishment of Export Processing Zone (EPZ) and Special Economic Zone (SEZ) schemes, which are managed by the Export Processing Zones Authority (EPZA). EPZs offer incentives and a barrier-free environment to promote economic growth by attracting foreign investment for export-oriented production. In comparison, SEZs are broader and more inclusive in design, and seek to stimulate sector-specific investments with an emphasis on agriculture, trade, tourism, mining and forestry.

As of March 2021, a total of 176 licensed companies were operating under EPZs and SEZs in Tanzania. Of these, 45% are domestic enterprises, 55% are foreign companies. To date, these companies have created close to 60,000 local jobs. But through expansion of these schemes and improved management, they hold the potential to bring about positive socio-economic transformation across the country by accelerating domestic and foreign direct investments, promoting transfer of new technology and skills, increasing government revenue, and boosting intra-regional trade. There are, however, insufficient business linkages between these investments and the wider domestic economy. Going forward, local government authorities (LGAs) will play a vital role in fostering these linkages. But how can they promote and manage these zones to create the necessary interconnections to leverage the full potential of these investments?

To seek answers to this question, UONGOZI Institute, in collaboration with the EPZA and the United Nations University-World Institute for Development Economics Research (UNU-WIDER) convened a national dialogue and workshop on 19 June 2021. Officiated by the Minister for Industry and Trade, Hon. Prof. Kitila Mkumbo (MP), the dialogue involved key stakeholders and leaders from the central government and select LGAs, entrepreneurs, investors from SEZs, and financial institutions. It featured discussions as well as a site visit to the Benjamin William Mkapa Special Economic Zone in Dar es Salaam to enable participants to see first-hand the supporting infrastructure required for these investments that can benefit and attract investors to both SEZs and host LGAs.

As of March 2021, a total of 176 licensed companies were operating under EPZs and SEZs in Tanzania. Of these, 45% are domestic enterprises, 55% are foreign companies. To date, these companies have created close to 60,000 local jobs.

Key messages and recommendations

The following key message and recommendations emerged from the discussions.

Management of SEZs needs to be increasingly devolved to Local Government Authorities

Currently, the EPZA manages all EPZs and SEZs in Tanzania. However, based upon the Policy Paper on Local Government Reforms - Decentralization by Devolution (D-by-D) of 1998 and the Presidential Instrument of November 2016 which assigns duties to the President's Office-Regional and Local Government, local government authorities are responsible for the implementation of all government policies and programmes, including industrial policy. Therefore, the management of EPZs and SEZs needs to be devolved to LGAs. Going forward, it is simply not efficient for the EPZA to manage SEZs across the whole country. Rather, for the EPZA to succeed in its objectives to promote investments in SEZs and accelerate industrialization, the EPZA should increasingly decentralize the management of SEZs to LGAs. This will make it easier to create linkages between the domestic economy and SEZs, ensure specialization in local value chains (so LGAs do not compete with the same products in the same markets) and contribute to government efforts to formalize the informal sector. At present, LGAs in Tanzania are mainly administrative units of the central government but they hold great potential to become centres of economic development. But, to begin this process and inform the next phase of implementation, a comprehensive review and evaluation of both the SEZ and EPZ programmes is required to identify its successes and challenges, to see what has been accomplished and determine what best practices can be replicated and where more efforts are needed.

Build the capacity of LGAs to effectively participate and manage investments in SEZs

It would be counter-productive to transfer responsibility to LGAs for managing SEZs without providing them with the requisite capacity to fulfil that responsibility. Therefore, the central government through its institutions, especially the EPZA, will need to empower local authorities through capacity building and development to effectively participate in and manage SEZ investments. To be successful, LGAs will need sufficient human and financial resources to acquire land for SEZs (including paying fair compensation to current landholders according to the law), allot and prepare the designated areas for investors, and put in place the necessary supporting infrastructure (including roads, water, reliable power supply and ICT). Positive cooperation, equity and transparency between the central government, LGAs and investors will be essential in achieving these outcomes.

Support and build the capacity of SMEs in Tanzania to successfully participate in SEZs

Small- to medium-sized enterprises (SMEs) can play an important role in the economy as a source of jobs and livelihoods, hence, they can promote inclusive growth. But, in Tanzania, most SMEs operate in the informal sector with few or no linkages to the formal economy. But what can be done to change this situation?

One viable solution is for promising smaller enterprises to collaborate with large formal firms. Research to date provides compelling evidence that large firms can help small firms to compete, grow and break into national and global markets. However, large foreign firms operating in low-income countries often decline to purchase from local suppliers, i.e., sub-contract with SMEs for inputs or services, due to poor quality and lack of supply chain management systems. Given the generally weak nature of the SME sector in Tanzania, the Government and large firms will need to show more commitment to building linkages. For example, government interventions, such as enactment and enforcement of local content policies/regulations, tax breaks or other incentives, may be required to establish linkages in those sectors where domestic SMEs have significant potential to supply large foreign firms. Additionally, these partnerships can be nurtured through supporting mechanisms, such as outsourcing, networking and training. Consequently, public-private partnerships (PPPs) may well be an effective approach for future SEZ investments.

Evidence also indicates that SEZ schemes can enhance the linkages between large and small firms and can contribute to the domestic economy and private sector development more broadly. SEZs act as more effective nets to attract foreign investment and can support SMEs by providing workspace and greater opportunities for contracts. Importantly, the productive capacity of both SMEs and SEZs will also need be strengthened so that they can produce quality inputs and finished goods, which can compete in regional and international markets.

Participants during the workshop.

01

Opening Session

1.1 Welcoming remarks

Mr. John Mathew Mnali, Acting Director General, Export Processing Zones Authority (EPZA)

Mr. Mnali welcomed participants to the workshop. In particular, he thanked Professor Kitila Mkumbo (MP), Minister for Industry and Trade, for officiating this policy dialogue on the linkages between Special Economic Zones (SEZs) and the local economy. He observed that the workshop brings together stakeholders from government institutions, entrepreneurs, investors from SEZs, and financial institutions, with the objective to raise awareness about investment opportunities in SEZs in Tanzania. He added that stakeholders' participation in the dialogue aligns well with the government's drive towards industrialization.

Continuing, Mr. Mnali described that SEZs are designated geographical areas equipped with physical and service infrastructure and governed by more liberal economic regulations than the country's typical laws. Hence, SEZs are used as an economic development tool to promote rapid economic growth by adopting fiscal and business incentives to attract investment and technology. He observed that the Tanzanian government established the Export Processing Zones Authority (EPZA) in February 2006, and, in 2008, the EPZA was tasked with the role of supervising the implementation of a Special Economic Zone (SEZ) programme so as to foster social and economic transformation [*Establishment of Economic Processing Zones* (Act No. 373 of 2006, as amended in 2012)].

Mr. Mnali observed that in order for the EPZA to attain its objectives, in line with the law, it performs the following functions:

- Acquire land in its name and lease or issue derivative rights to investors or erect thereon industrial and commercial buildings and lease such buildings to investors
- Provide basic infrastructure for purposes of operations in the EPZ or SEZ;
- Provide utilities and a system of sewerage and drainage and removal of refuse and waste for the benefit of the EPZ or SEZ;
- Prepare national and international programmes for appropriate promotion of EPZ and SEZ schemes;
- Ensure the provision of security and surveillance, property and equipment maintenance and availability of restaurants and food services;
- Provide commercial information for the benefit of the investors in the EPZ and SEZ;
- Provide any other public utility as may be necessary for the betterment of operators and investors within the EPZ and SEZ; and
- To issue EPZ and SEZ licenses.

Mr. Mnali observed that in the course of carrying out its functions, the EPZA has registered a number of achievements. Since its establishment, the EPZA has issued licenses to 176 companies which have invested USD 2.5 billion and created 58,158 employment opportunities as of March 2021. Notwithstanding these registered achievements, Mr. Mnali stated that the EPZA recognizes the importance of further promotion to all relevant stakeholders regarding SEZs; and how they contribute to creating an industrialized economy. He emphasized that the workshop's objective is to raise awareness on the opportunities available and promote linkages between SEZs and the local economy. He further observed that the EPZA, in collaboration with UONGOZI Institute, organized the workshop so as to support government efforts to promote investment in industrialization. Thereafter, Mr. Mnali invited the Minister for Industry and Trade to deliver the opening speech.

Mr. John Mnali.

1.2 Keynote Speech

Professor Kitila Alexander Mkumbo (MP), Minister for Industry and Trade

Professor Mkumbo thanked the organizers, EPZA and UONGOZI Institute, for their invitation to officiate the workshop. He commended EPZA and the Institute for organizing the event which aims to increase awareness of the EPZA, which, despite many achievements, remains little known by ordinary citizens. Professor Mkumbo emphasized that the workshop's theme—linkages between SEZs and local economy—is very relevant and complementary to the government's efforts of bringing about social and economic transformation.

Professor Mkumbo observed that Tanzania has less than five years to attain the goals of the Tanzania Development Vision 2025, which, among other goals, aimed to create a sustainable and competitive economy with middle-income status. He added that, since 2011/12, the implementation of Vision 2025 has been broken down into a series of three Five-Year Development Plans, one for each phase of national development. Presently, Tanzania is implementing the third Five Year Development Plan 2021/22–2025/26 (FYDP III) with the theme "Realising Competitiveness and Industrialisation for Human Development". He also related that the Government prepared a Tanzania Mini-Tiger Plan 2020 with the core strategy of establishing SEZs in the country. This Plan was inspired by Asian countries, especially China, and borrowed from their experience.

However, despite a number of important strides, Professor Mkumbo observed that Tanzania had met some challenges in implementing its 2020 Mini-Tiger Plan. For instance, he observed that the process of land acquisition so as to lease or issue derivative rights to investors had only been done efficiently in the Benjamin William Mkapa Special Economic Zone (BWM-SEZ) located at Mabibo in Dar es Salaam, which serves as a model area and is fully functional. In contrast, the Bagamoyo SEZ in Coast Region is less functional, and other areas such as Kurasini (also in Dar es Salaam region) and in other regions of the country are lagging far behind.

He related that SEZs have played a major role in the economic growth in Asian countries, especially China, and Tanzania's Third Five Year Development Plan, currently being implemented by the Government puts great emphasis on industrialization. The Plan identifies SEZs as a catalyst to spur industrial development in the country. Hence, Professor Mkumbo observed that a clear government policy at the national level exists to support SEZs, and he highlighted the strong political resolve and direction to support SEZs in the country. This was manifested in the speech of the late President John Magufuli to the National Parliament on 13 November 2020 when he insisted on attracting investors and creating a conducive environment for investors. Likewise, President Samia Suluhu Hassan speech to Parliament on 22 April 2021 reflected this position as she insisted on creating a conducive environment for investment and SEZs. Also, she emphasized the creation of industrial parks, which is an extension of the implementation of SEZs.

Hon. Kitila Mkumbo delivers opening speech.

In line with this thinking [of creating industrial parks], the Government has decided to develop Kurasini. Professor Mkumbo said that the government will announce later this year that Kurasini will be designated as an industrial park and all investors, local and foreign, will be invited to invest. He informed stakeholders that the feasibility study is already underway and potential investors should get ready to seize the opportunity. Bidding for investors in Kurasini will commence in July and August 2021. Further, Professor Mkumbo informed stakeholders that the government is planning to build world-class industrial parks in Arusha and Mwanza, and that designated areas in the two regions have already been identified. Plans are also underway to improve Bagamoyo SEZ.

In addition, monitoring of SEZs in Tanzania is to be improved. Currently, the EPZA is responsible for supervision of SEZs. However, Professor Mkumbo identified the need to improve monitoring in two areas. First, a critical comprehensive review and evaluation of the SEZ programme is required to identify its successes and challenges. He observed that the government has not conducted such a review since the SEZ programme was rolled out, but is now of vital importance to inform the next phase of implementation.

The second area that needs intervention is to improve monitoring, supervision and management of the SEZs. Professor Mkumbo said that the intention is to have a few areas that are managed by the central government through the EPZA, while other SEZs will be managed by local government authorities (LGAs). At present, LGAs in Tanzania are mainly administrative units of the central government, but they have great potential to become centres of economic development. One way of promoting this change is for LGAs to be given responsibility for the management of SEZs. In turn, this will make it easy to create linkages between the local economy and SEZs while contributing to government efforts to formalize the informal sector.

Professor Mkumbo highlighted competition as a key area for improvement. He said that Tanzania is a member to several economic communities including the East African Community (EAC), the Southern African Development Community (SADC), and that very soon the country will ratify the African Continental Free Trade Area (ACFTA). Accordingly, this calls for the country to be much more competitive at the regional and international level. He said that if Tanzania targets the markets of EAC member states only, it will be effectively targeting the local market only. Because upon ratifying the ACFTA, the EAC market will be a local market. Therefore, the country needs to target European, American and Asian markets. He also informed workshop stakeholders that the Democratic Republic of Congo (DRC) will soon be joining the EAC. He insisted that Tanzania needed to prepare well and capitalize on these opportunities by updating its competitive advantage. If Tanzania is not competitive enough, it will end up becoming a market for imports. However, for it to reap the full development benefits Tanzania must export to other markets. This is why the SEZs are so important because the products produced in the SEZs are of world-class quality.

Professor Mkumbo stressed that the position of the government is to support the industrial sector to use local raw materials, create employment opportunities and generate revenue. Many opportunities exist right now, and the government will work to create more opportunities for the private sector and investors as the government does not do business. Despite the fact that the government is working hard to attract foreign investors, he emphasized the importance of local investors contributing actively to the value chain. No country has developed by relying only on foreign investment; local investment is of equal importance. This is why the government sees huge potential in local investment that can be unearthed and contribute positively to economic development through SEZs.

In closing, Professor Mkumbo said that the government and his ministry were looking forward to hearing the opinions and recommendations from workshop participants on how to further strengthen investment in the country. He declared the workshop officially open.

02

Expert Presentation: SEZ Investments, their potential, and how LGAs and SMEs can maximize them

Mr. James Maziku, Director of Investment Promotion and Facilitation, EPZA

Mr. Maziku stated that the EPZA was established in February 2006, following amendment of Act No. 11 of 2002. Then, in 2008, the government tasked EPZA with the role of supervising the implementation of the Special Economic Zone (SEZ) programme so as to foster social and economic transformation. He stated that the EPZA works under the Ministry of Industry and Trade and it is responsible for establishing, developing, promoting and managing implementation of all programmes of EPZ and SEZ. Mr. Maziku highlighted the following policy objectives for EPZA including to:

i. Attract and promote investments in the export sector;
ii. Create and expand foreign exchange earnings;
iii. Create jobs, thus boosting employment in the economy; and
iv. Enhance value of exports by promoting domestic value addition through processing of local raw materials and intermediate goods before exporting.

Further, Mr. Maziku highlighted the functions of EPZA which include the following:

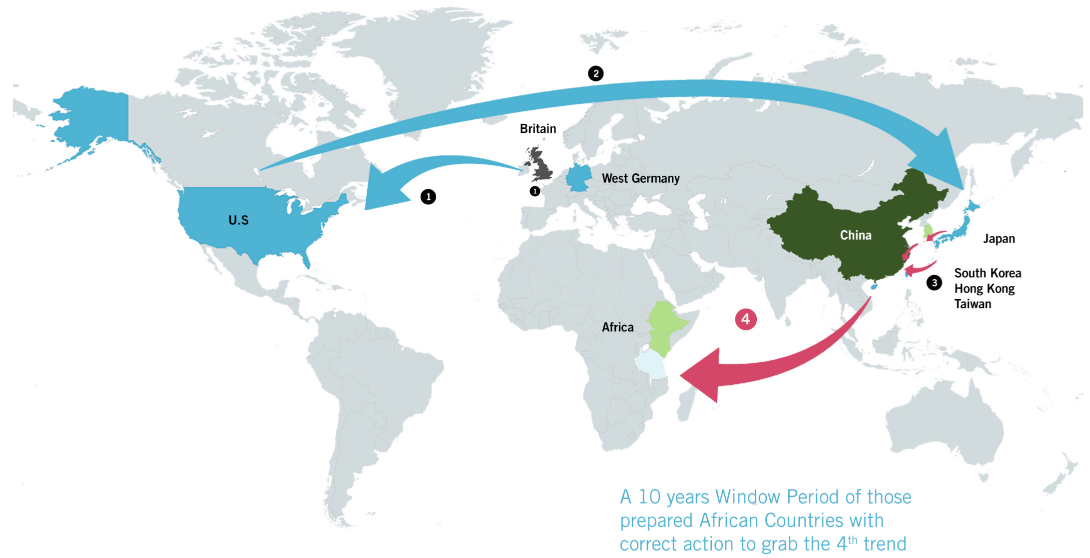
- Acquire land in its name and lease or issue derivative rights to investors or erect thereon industrial and commercial buildings and lease such buildings to investors;
- Provide basic infrastructure for purposes of operations in the EPZ or SEZ;
- Provide utilities and a system of sewerage and drainage and removal of refuse and waste for the benefit of EPZ or SEZ;
- Prepare national and international programmes for appropriate promotion of EPZ and SEZ schemes;
- Ensure the provision of security and surveillance, property and equipment maintenance and availability of restaurants and food services;
- Provide commercial information for the benefit of the investors in the EPZ and SEZ;
- Provide any other public utility as may be necessary for the betterment of operators and investors within the EPZ and SEZ; and
- To issue EPZ and SEZ licenses.

After highlighting the functions of EPZA, Mr. Maziku expounded on the international transfer of labour-intensive industry. Referencing Figure 1, he indicated that Africa is presently the focus for the transfer of labour-intensive industries. However, to take full advantage of this trend, Mr. Maziku stressed that investors need land for investment, reliable power supply, availability of skilled labour, offsite supporting infrastructure, a one-stop-service centre (OSSC) and external supporting infrastructure.

Figure 1: International Transfer of Labor-Intensive Industry

INTERNATIONAL TRANSFER OF LABOR INTENSIVE INDUSTRY

THEORY OF COMPARATIVE ADVANTAGES: CHANGES IN ABUNDANCE OF FACTORS RESULTS IN CHANGES IN SPECIALIZATION AND INDUSTRY TRANSFER
THEORY OF LABOR INTENSIVE INDUSTRY TRANSFER: INDUSTRIES TRANSFER WITH COMPARATIVE ADVANTAGES IN LABOR INTENSIVENESS



From the 1st Industrial Revolution to WWII	Britain	From the 1st Industrial Revolution to 1940's
After WWII	US West Germany	1973 -1980
After 1970's	Japan, S Korea Hong Kong, Taiwan	1980s - 2000s
After 1980's	China	1994 - Today

Mr. James Maziku.

Continuing, he observed that in Tanzania, the SEZs and industrial economy agenda are anchored in:

i. The Chama Cha Mapinduzi (CCM) Election Manifesto of 2020-2025 [page 57];
ii. President Samia S. Hassan speech to Parliament, 22 April 2021; and
iii. Five Year Development Plan III [page 137].

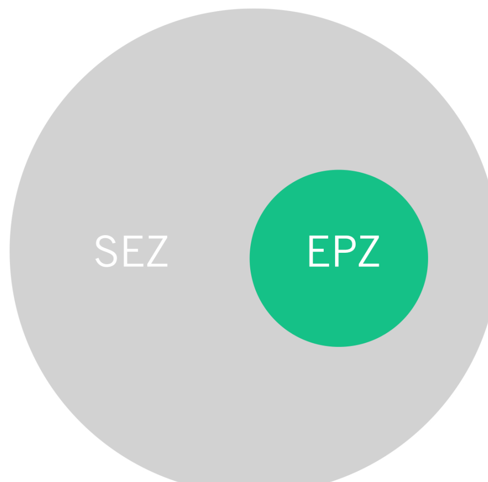
What are the differences between EPZ and SEZ programmes?

To support policy and implementation, it is important to understand the key differences between the EPZ and SEZ programs in Tanzania. As illustrated in Figure 2, an EPZ is one type of SEZ.

Mr. Maziku related that the EPZ programme focuses on:

- Increasing foreign earnings;
- Promoting the industrial sector through export-led manufacturing industries;
- Generating employment and improving skills development for industrial production;
- Enhancing technological transfer; and
- Promoting processing of agro-products and other raw materials for value addition.

Figure 2: Diagram illustrating difference between an EPZ and an SEZ



On the other hand, the SEZ program is implemented under the Special Economic Zones Act which was approved by the Tanzanian Parliament in February 2006. In that year, the mandate for SEZ administration was transferred to the Export Processing Zones Authority. The EPZA is the implementing agency for this programme. The SEZ is a key strategy of the Government to support implementation of 'Mini-Tiger Plan 2020. Importantly, for its establishment, an SEZ

- Cannot be single factory unit, i.e., stand-alone factory

- Involves investments in other sectors, for example, tourism, information, communications and technology (ICT), free ports; and
- Produces for export as well as local markets.
- To further differentiate the purposes of the two types of zones, Mr. Maziku highlighted the priority sectors for each zone (Table 1).

Opportunities for investment through SEZs in Tanzania include a number of sectors such as: agro-based processing industries; fish processing; irrigated farming; mining and minerals processing; tourism; energy production; infrastructure development on special economic zones (industrial parks); trade and logistics hubs; real estate; flour milling factories; beekeeping; and abattoirs and meat processing.

Table 1: Key priority sectors for SEZ and EPZ in Tanzania

SEZ priority sectors	EPZ priority sectors
Agriculture and agro-industrial	Textile and garments
Manufacturing	Agro-processing
Commercial	Leather processing and manufacture of leather products
Tourism	Lapidary (diamond, gemstone, etc.)
Forestry	Wood products
ICT parks	Electronic appliances
Banking and financial centres	

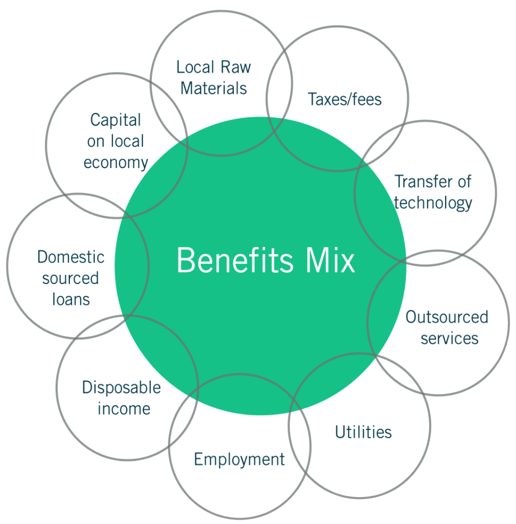
In addition to the differing types of industries and firms that the Government seeks to establish in the two zones, differing eligibility criteria and investment packages apply to SEZ and EPZ. For example, as shown in Figure 3, eligibility for investment in an SEZ requires a minimum capital amount while eligibility for an EPZ requires the enterprise to export a minimum value of goods annually. Of further note, SEZ enterprises have no exemptions on corporate tax, value-added tax (VAT) on utilities and withholding tax.

Figure 3: Differences in incentives for investments between SEZ and EPZ programmes

The economic benefits of SEZs and EPZs

Mr. Maziku then described the successes and economic benefits of SEZs and EPZs since their creation in Tanzania. He said that USD 2.346 billion in capital has been invested in the country and 58,198 employment opportunities (for Tanzanians) have been created. Likewise, he observed that exports have reached USD 2.518 billion. With regard to the economy, Mr. Maziku highlighted that SEZs can offer a broad mix of benefits to the domestic economy as illustrated in Figure 4.

Figure 4: Benefits mix of SEZs to the Economy

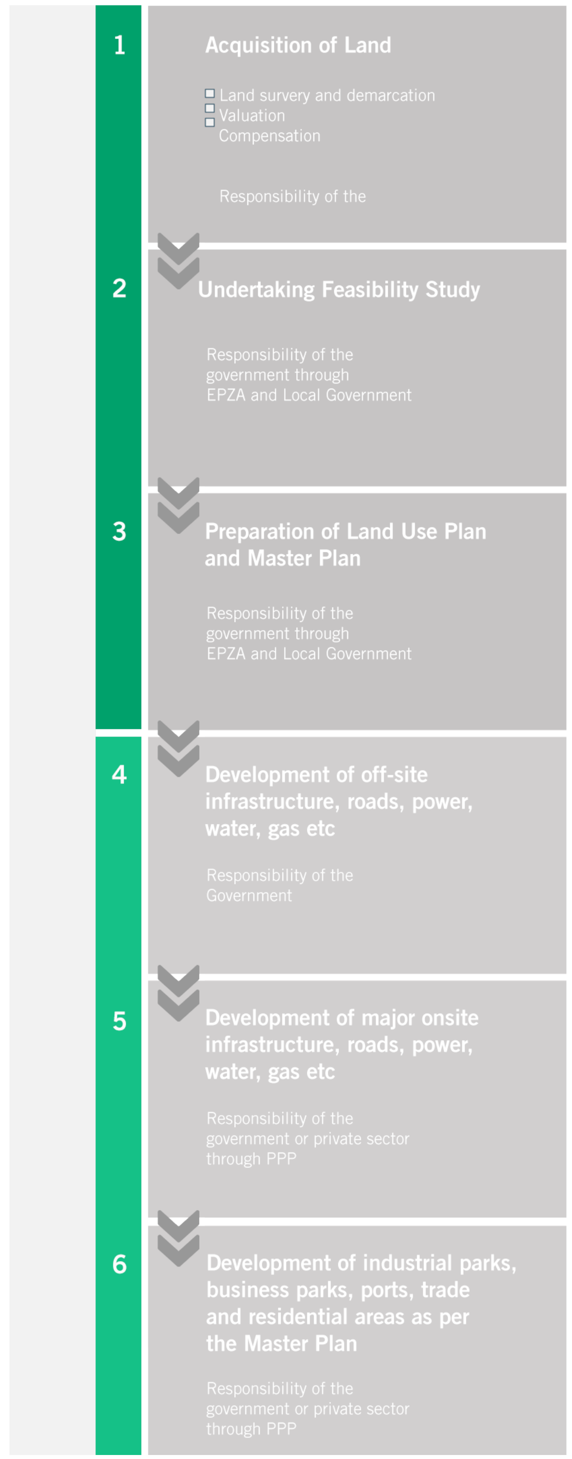


On the other hand, Mr. Maziku noted that the government benefits through SEZs since the latter simplifies infrastructure connectivity, simplifies monitoring and evaluation, and allows streamlined provision of services to investors through one-stop service centres (OSSCs). He highlighted the roles of different stakeholders in the context of SEZs as follows:

- Government – Provision of enabling investment climate
- Private sector – Investors and tax generators;
- Organized labour – Productivity and industrial relations;
- Academia – Human capital formation and research and development (R&D); and
- Primary producers – Provision of food and raw materials.

Mr. Maziku concluded his presentation by giving an overview of the important steps in developing the SEZs and EPZs in Tanzania as can be seen in Figure 5.

Figure 5: Important Steps in SEZ/EPZ Development



Workshop participants follow as Mr. James Maziku delivers his presentation.

03

Field Trip: Visit to Benjamin William Mkapa Special Economic Zone

Facilitator: Mr. Rigobert Massawe, General Manager of Tooku Garments Company (TGC)

Workshop participants had an opportunity to visit Tooku Garments Company (TGC) located in the Benjamin William Mkapa SEZ in Mabibo, Dar es Salaam. Mr. Massawe, General Manager of TGC, facilitated the visit.

To begin, he informed participants that TGC is the overseas subsidiary garment manufacturing company of J. D. United Corporation Ltd. It started production in July 2012 in a single building (unit A), which accommodated a sewing section, cutting section, washing and finishing, and employed 1,000 workers. Since then, TGC has expanded year by year. As of 2020, TGC has 5 factories in the Benjamin William Mkapa SEZ with 3,322 employees (Figure 6) and 32 foreign supervisors. According to Mr. Massawe, most of the supervisors have worked internationally for many years, including in Cambodia and Philippines, Madagascar, Mauritius and other African countries. Consequently, TGC has more than 1,000 pieces of advanced equipment for production.

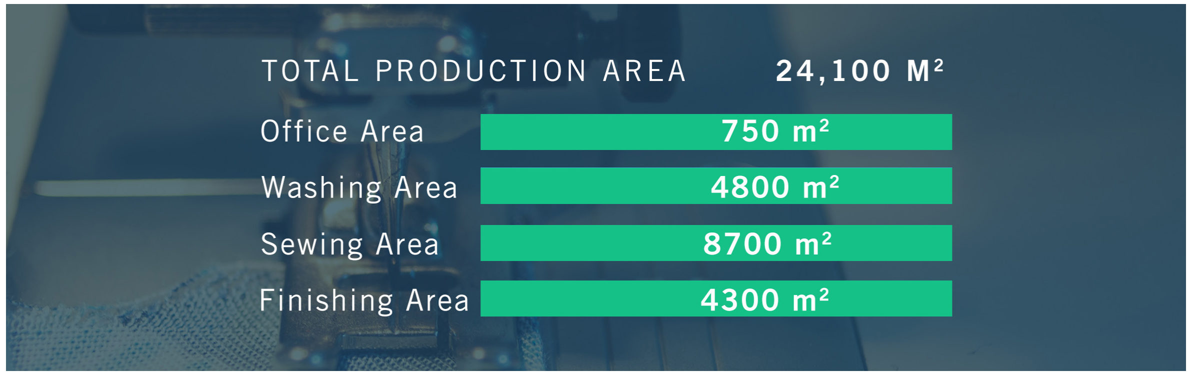
Figure 6: Manpower status in the 5 factories of TGC

MANPOWER STATUS IN EACH FACILITY 2020

FACTORY	FEMALE	MALE	TOTAL
TOOKU A	122	289	411
TOOKU B	474	164	638
TOOKU C	652	103	755
TOOKU F	1279	205	1484
TOOKU G	12	22	34
TOTAL	**2539**	**783**	**3322**

The total area of the factory is 36,000 square metres (Figure 7). Factory A (Tooku A) is for washing plant. Factory B (Tooku B) is for finishing, warehousing and packing. Factory C (Tooku C) is for sewing and offices. Factory F (Tooku F) is for sewing and training, and Factory G (Tooku G) is the warehouse for fabric and accessories. Participants visited five areas at TGC: (i) cutting area; (ii) sewing area; (iii) laundry area; (iv) design area; and (v) packaging and export area. Mr. Massawe observed that the company's garment output is 700,000 pieces per month. Further, he said each unit within the company has specific daily targets. For instance, the cutting area has 148 employees who produce 32,000 pieces per day. The sewing area has 1,800 employees with 24 sewing lines. Each line has between 68 to 78 employees who produce 1,800 pieces per day. Mr. Massawe further observed that TGC has 7 automatic hanger system lines in Tooku C and another 17 sewing lines in Tooku F for a total of 24 sewing lines.

Figure 7: TGC area at Benjamin William Mkapa SEZ




Sewing area at TGC

TGC manufactures jean products and the company's principal markets are USA and Canada. At present, the company imports 90% of its manufacturing materials from China and India, as the company cannot source the required materials from the local market and hence has to order from overseas to meet its demand. Right now, only five local companies are supplying manufacturing materials to TGC; of which three are supplying packaging services and two are supplying chemicals. Hence, Mr. Massawe observed that opportunities exist for local investors and companies to capitalize on to supply materials to TGC. The most obvious ones include buttons, fabric, chemicals, packaging and logistic services. He called upon serious investors and companies to tap the market and said that TGC is prepared and would prefer to partner with local investors and companies rather than import almost all of their manufacturing inputs. And the opportunities for suppliers will grow as TGC has a three-year plan to increase production capacity from 700,000 to 3,000,000 pieces per month in 2022.

Figure 8: TGC main clients

Participants at one of TGC's production areas.

04

Expert presentation: How can linkages with SEZ investments spur growth of small- to medium-sized enterprises (SMEs) in Tanzania?

Dr. Josaphat Kweka, Principal Researcher for ESRF and REPOA

To begin, Dr. Kweka said that small- to medium-sized enterprises (SMEs) can play an important role in the economy as a source of jobs, incomes and livelihoods, hence, they can be an effective means of achieving inclusive growth. But, the question remains as to how and to what extent this can be achieved in low-income countries (LICs) in Sub-Saharan Africa (SSA) such as Tanzania, where most SMEs largely operate in the informal sector with few or no linkages to the formal economy.

Dr. Kweka related that one viable solution is to establish linkages between SMEs and large formal firms. He said that research provides strong evidence that large firms can help small firms to compete, grow and break into national and global markets (Hussain, 2000).[1] However, what is not known is how do these linkages occur, which type of linkage works best, and under what environments? Moreover, he observed that there is no universal, one-size-fits-all solution. Rather, the interventions required depend on the size of linkage and the level of private sector development (PSD) and economic growth, the quality of institutions, the policy and business environment, and effectiveness of programmes in the particular country.

To examine these issues in the context of Tanzania, Dr. Kweka conducted an analysis of whether linkages with large firms can spur the growth of SMEs in Tanzania (Kweka & Sooi, 2020).[2] The paper analyzed the nature, determinants and impact of the linkages between SMEs and large firms in Tanzania. The specific questions asked were:

- To what extent are SMEs linked to large firms?
- In what forms are SMEs linked with large firms, i.e., what types of linkages exist?
- What factors determine/affect the linkages between SMEs and large firms?
- What is the impact of linkage with large firms on SMEs growth performance?

The analysis used Annual Survey of Industrial Production (ASIP) in Tanzania data from 2008 to 2016. According to ASIP data collected in 2016, Tanzania had 2,462 establishments with 10 or more employees, of which the large majority (88.3%) were SMEs. In that year, SMEs contributed 23.1% of industrial output, 24.8% of industrial value-added and 39.5% of industrial employment. However, Dr. Kweka noted two limitations of the data. First, information on firm linkage is not specific to firm size, and, second, the ASIP data cover industrial sectors only, hence, no data are available on enterprises in the services and other sectors. Describing the methodology applied, he said that explanatory variables in the analysis included shortage of raw materials, export, association, training, SEZ, private, foreign, association, capacity utilization, firm age and total production. Linkage variables included forward linkages (sales/imports), backward linkages (purchases/exports), technology, and competition (SMEs in sectors with large firms). He said that the measures for SME growth used were log of sales and log of employment. He further explained that backward linkages are most beneficial for increasing employment, while forward linkages edge out other linkage variables for improving sales.

Overall, results showed that linkages between SMEs and large firms are beneficial to the growth performance of SMEs, albeit differing by the measure of growth. Focusing on the sales metric: SMEs participating in forward, competition and technology linkages with large firms demonstrated higher sales performance compared to those that do not have those linkages. In other words, linkages with large firms are significantly beneficial to SMEs growth, especially in accessing technology, raw materials, and knowledge and networking. Dr. Kweka observed that the findings may inform formulation of policies and design of initiatives for supporting the growth of SMEs by identifying ways of nurturing partnerships with large firms, and the amendment of current initiatives/programmes to support firm linkages, such as outsourcing, associations, networking, training and SEZ schemes.

Regarding whether SEZs offer opportunities for supporting the growth of SMEs, and, in turn, linkages with local economy, Dr. Kweka noted that the review of literature performed for the paper supports the hypothesis that operating in an SEZ can enhance linkages between large and small firms, and SEZ schemes can contribute to the local economy, for example, through the growth of SMEs and private sector development more broadly. With regard to channels through which SEZ investments benefit PSD/SMEs in the local economy, Dr. Kweka observed that SEZs:

- Represent more effective nets for attracting investment, usually foreign direct investment (FDI);
- Support MSMEs through providing workspace for MSMEs or/and benefiting from linkages, such as sourcing and contracts;
- Facilitate trade and access to markets, which is how East Asian countries managed to transform rapidly as the access to export markets had a feedback loop for domestic enterprises;
- Unlock the potential in specific sectors/themes, for example, agro-industrial parks (AIPs), border economic zones (BEZs), science/high tech, through adopting a sectoral and thematic focus for a SEZ
- Contribute (via a general channel) to induced effects of increased productivity, competitiveness and growth; and
- Act as the epicentre for formulating and implementing investment reforms and enhancing industrial development.

However, Dr. Kweka observed that SEZ experiences in Africa show that the spill-over effects are small due to weak domestic linkages. The literature shows that firms are benefiting from technological transfers through supply chains and from export markets but not from each other, i.e., zones fail to reap clustering effects. Generally, evidence points to very low firm linkages by size (large vs. SMEs) and between foreign and domestic enterprises, mainly due to capacity deficits. He argued that the question is whether domestic enterprises are really interested to join zones despite the obvious benefits. For example, Kinyondo et al (2016) found that the export requirement for firms to locate in EPZs is the main roadblock, hence, making regional integration counter productive to EPZ regimes.

1HUSSAIN, N.M. (2000). LINKAGES BETWEEN SMES AND LARGE INDUSTRIES FOR INCREASED MARKETS AND TRADE: AN AFRICAN PERSPECTIVE. *AFRICAN DEVELOPMENT BANK ECONOMIC RESEARCH PAPERS NO. 53*. ABIDJAN, COTE D'IVOIRE: AFRICAN DEVELOPMENT BANK. AVAILABLE AT HTTPS://WWW.AFDB.ORG/FILEADMIN/UPLOADS/AFDB/DOCUMENTS/PUBLICATIONS/00157640-EN-ERP-53.PDF

2 KWEKA, J. AND SOOI, F. (2020). PARTNERSHIP FOR INCLUSIVE GROWTH. CAN LINKAGES WITH LARGE FIRMS SPUR THE GROWTH OF SMES IN TANZANIA? *WIDER WORKING PAPER 2020/102.* UNU-WIDER AND UONGOZI INSTITUTE. AVAILABLE AT PUBLICATIONS – UONGOZI INSTITUTE

Dr. Kweka also noted that, generally, large firms often decline to purchase from local suppliers, i.e., sub-contract with SMEs, due to poor quality and lack of supply chain management systems. However, a few exceptional cases in Tanzania stand out which can be learned from. These are:

- *Case 1: Tanzania Breweries Limited (TBL) and Kioo Ltd.* TBL invested in upgrading the capacity of its potential local suppliers (glass, barley and label suppliers) thus reducing costs and empowering the local economy with dramatic impacts. Kioo Ltd is now a glass manufacturer in Africa, supplying 100% of the bottles for TBL as well as for Coca Cola and Pepsi brands.
- *Case 2: Kilombero Business Linkage Project (KBLP).* This initiative by the Kilombero Sugar Company Limited to link with out-grower schemes doubled the numbers of cane farmers contracted from 2,760 to 5,000 in two years. Over the same period, the cane harvest increased 42.5% per annum and the value to local communities increased from TZS 7 billion to TZS 11 billion TZS per annum.
- *Case 3: United Nations Conference on Trade and Development (UNCTAD) business linkages program* where UNCTAD in conjunction with the United Nations Industrial Development Organization (UNIDO) and International Trade Centre provided technical assistance to establish and consolidate business linkages between agro-producers (dairy farmers), large processors (including Tanga Fresh) and the tourism industry to supply milk by empowering 565 dairy farmers on good agricultural practices and entrepreneurship. In doing so, the farmers involved doubled supplies.
- *Case 4: Linkages between large processors and small-holder out-grower schemes in the horticultural sector.* These interventions increased production exponentially with significant value addition, diversification, employment and value-chain development impacts, for example, among avocado producers in Kilimanjaro and Mbeya/Njombe.

Dr. Kweka highlighted important lessons learned from his analysis of interventions in Tanzania to promote linkages with the domestic economy. First, the initiatives (by government, development partners and large firms) to promote linkages are isolated with little, if any, evaluation or replication, hence their effect is less dramatic than their potential. Second, the successful cases indicate that demand-driven initiatives by large firms are more successful than the supply-driven initiatives by public programmes. However, the latter can play a useful role in capacity building and access to information, which appears critical for SMEs preparedness to enter the linkage relationships. Hence, this suggests the value of public-private partnerships (PPPs).

In addition to Tanzania's experiences, ample evidence of successful initiatives in other countries exist such as:

- Clustering in SEZs in Mauritius;
- Invitations to SME suppliers to co-locate in SEZs in Kenya;
- Empowering meso-institutions to promote skills development centres in Vietnam;
- Technology upgrading programmes implemented by Unilever for its SME suppliers; and
- South Africa's SME empowerment programmes.

Based on the evidence collected by the study, the conclusion may be drawn that, although the extent of linkages of SMEs with large firms in Tanzania is currently low, initiatives to strengthen linkages have significant potential to spur the growth of SMEs. At present, most of the SMEs appear to have more linkages in technology (38.4%) and competition (20%) compared to backward linkages (8%) and forward linkages (5%). Furthermore, although linkage effects vary by type and measurement, production capacity and foreign ownership appear to be most consistent drivers of linkages. Lastly, the generally weak nature of the SME sector means that the Government and large firms need to show more commitment to building linkages.

Dr. Kweka concluded his presentation by offering the following recommendations for the Government.

Encourage large firms to engage in partnerships with small firms. Demand-driven linkage initiatives are more effective and successful initiatives can be replicated.

Promote SME linkages with foreign/SEZ firms by providing tax incentives to sectors in which SMEs have significant potential to supply large firms and/or nurture these partnerships through supporting mechanisms, such as outsourcing, networking, training, and SEZ schemes.

Support the upgrading of SMEs to enable partnerships with large firms through such incentives as deducting a certain proportion of the Skills Development Levy when the large firm is engaged in upgrading/capacity building initiatives.

Strengthen R&D (tech) activities, for example, by augmenting funding to R&D institutions, reinstating the R&D units in all productive sectors and supporting SMEs in technology acquisition from large/SEZ firms.

05

Expert Presentation: The legal and policy framework for LGAs' management of SEZ

Mr. Leo Mabika, Director, Economic and Productive Sectors, President's Office-Regional Administration and Local Government (PO-RALG)

To commence his presentation, Mr. Mabika observed that the President's Office-Regional Administration and Local Government (PO-RALG) in Tanzania consists of three levels: the President's Office (headquarters), regional administration and local authorities. He stated that the local authorities in Tanzania are established by Act No. 7 and Act No. 8 of 1982. Local Government (District Authorities) Act No. 7 of 1982 establishes local authorities within rural areas of Tanzania whereas Local Government (Urban Authorities) Act No. 8 of 1982 establishes local authorities within urban areas of Tanzania. Further, he observed that regional administration is established by Act No. 19 of 1997.

Mr. Mabika also noted that the roles of local government authorities (LGAs) in Tanzania were provided by the Policy Paper on Local Government Reforms—Devolution by Decentralization (D-by-D) of 1998 and Presidential Instrument of November 2016 which assigns duties to PO-RALG. Mr. Mabika observed that the Presidential Instrument (2016) empowers the PO-RALG to implement all sectoral policies through LGAs. Therefore, LGAs are the implementers of all government policies and programmes. For LGAs to be able to fulfil this mandate, they are guided by the Local Government Finance Act, Chapter 290 which empowers LGAs to collect and spend taxes. It also empowers LGAs to invest so as to increase their financial base and deliver quality services to the citizens.

Accordingly, the central government ministries, departments and agencies (MDAs) have four functions: (i) to make policies, laws, regulations and programmes; (ii) to set quality standards; (iii) to build capacity for the implementers; and (iv) to do monitoring and evaluation – so as to give feedback to the implementers on where and how to improve. He observed that the Policy Paper on Local Government Reforms identifies four areas of decentralization by devolution which include:

i. Political decentralization is a devolution of powers and the setting of the rules for councils and committees, the chairpersons, etc. Political decentralization would include the integration of the previously centralized or deconcentrated service sectors into a holistic local government system whereby councils are installed as the most important local political body within its jurisdiction. Political decentralization implies the creation of real, multi-functional governments at the local level within the framework of national legislation.

ii. Financial decentralization is based on a definition of the principles of financial discretionary powers of local councils, i.e., powers to levy local taxes and the obligation of central government to supply local governments with adequate unconditional grants and other forms of grants. The principle also allows local councils to pass their own budgets reflecting their own priorities, as well as mandatory expenditure required for the attainment of national standards.

iii. Administrative decentralization: This principle involves de-linking local authority staff from their respective ministries and procedures for establishment of a local payroll. Local governments will thus have and recruit their own personnel, organized in a way decided by the respective councils in order to improve service delivery. Administrative decentralization makes local government staff accountable to local councils.

iv. Changed central-local relations: The role of central government vis-a-vis local councils will be changed into a system of inter-governmental relations with central government having the overriding powers within the framework of the Constitution. Line ministries will change their role and functions into becoming: 1) policy-making bodies; 2) supportive and capacity-building bodies; 3) monitoring and quality-assurance bodies within the local government legislation framework; and 4) regulating bodies (legal control and audit). The Minister responsible for local government will coordinate central-local relations and in particular all initiatives from sectoral ministries on matters relating to local government.

To conclude his presentation, Mr. Mabika insisted that against the backdrop of devolution, LGAs are the governmental entities which have the responsibility to implement industrial policy in Tanzania. Hence, for the EPZA to succeed and thrive in carrying out its set objectives, it must decentralize and build the capacity of LGAs. It is not efficient for the EPZA to manage SEZs across the whole country. The only and smart way of managing SEZs is by decentralizing this role to LGAs and building their capacity. Consequently, the EPZA should focus on making policies, building local capacity and performing monitoring and quality assurance, while the LGAs are responsible for implementing the policies developed by EP

After the presentations, participants were divided into two groups. The first group was tasked with discussing the opportunities and challenges facing LGAs with regard to participating in and managing investments in SEZs, and how to address these challenges. The second group was tasked to deliberate on the opportunities and challenges facing SMEs and investors in Tanzania participating in SEZs and creating linkages with the local economy. Each group was asked to present their findings to the workshop.

LGAs are the governmental entities which have the responsibility to implement industrial policy in Tanzania. Hence, for the EPZA to succeed and thrive in carrying out its set objectives, it must decentralize and build the capacity of LGAs. It is not efficient for the EPZA to manage SEZs across the whole country. The only and smart way of managing SEZs is by decentralizing this role to LGAs and building their capacity.

06

Group discussion and presentations

6.1 LGAs group

From discussion, LGAs can participate in investment in SEZs in a number of ways. They include to:

- Facilitate capital for investment in the SEZs in their jurisdictions.
- Ensure specialization in value chains, for instance, Muheza District could concentrate on cassava production, whereas Manyoni District could specialize in the production of cashew nuts. The purpose is to ensure that local authorities are not competing in the same markets by producing the same products/ materials.
- Ensure provision of infrastructure, including water, electricity and roads.
- Acquire land for SEZs, including paying fair compensation, i.e., ensuring that landowners are compensated in line with the law.
- Assist in zoning of the SEZ land for large, medium and small-scale investors to ensure that large-scale investors do not invade areas allotted to small-scale investors.

With regard to what needs to be improved to facilitate LGAs involvement and management of SEZs, the group raised the following issues.

- The law requires LGAs to be fully involved in managing SEZs in their respective jurisdictions. However, this is presently not done. Hence, LGAs must be encouraged and supported to participate fully as per their legal responsibilities.
- In areas already designated for SEZs, zones for medium and small-scale investors should be identified and preserved. This will make it more favourable for LGAs to link local economies with SEZs.
- The Land Act should be amended so that LGAs can issue derivative rights and lease out land in SEZs and EPZs. As of now, only the Tanzania Investment Centre (TIC) and EPZA have such rights.
- LGAs can identify all the potential areas for investment in their respective jurisdictions and then TIC and EPZA can link them with potential investors.

Regarding challenges that can emerge between LGAs and investors within an SEZ setup, the following issues were highlighted by the group:

- Availability of land, equipped with all the infrastructure that the investors need (that is, roads, water, reliable power supply);
- LGAs capacity to compensate for acquired land as required by law;
- Institutional overlaps, conflicts and misunderstandings between central government and LGAs; and
- Poor understanding of the law (investment and land laws).

The group proposed the following solutions to address the challenges identified above.

- Maximum and positive cooperation is essential between LGAs, investors and central government.
- LGAs and central government should know that it is not the value of land that matters as the payment made to acquire land is a one-off. Rather, it is the investments that are put in place after land acquisition that matter. The focus of SEZ schemes should be on employment created, revenue generated, technology transfer and other outputs.
- LGAs should prepare the designated areas for investment well in advance. All supporting infrastructure (roads, power, water, land compensation, etc.) so that when the investors arrive there are no outstanding conflicts or issues. Investors want to start production immediately after acquisition of land, not to wait for several years before actual production takes off.
- LGAs should develop positive attitudes towards investors.
- The central government through its institutions should empower local authorities through capacity building and development so that they can improve performance in managing the SEZs.

6.2 SMEs and investors group

The group identified a number of challenges which can act as bottlenecks to linking the local economy and SEZs. The challenges include:

- SMEs have no capacity to produce goods of a quality required by SEZs
- Poor technology
- Poor information and communication systems to communicate opportunities available in industry
- Lack of capacity to manage compliance issues such as certification
- Delays in issuing payments to suppliers
- High costs of production due to hostile business environment
- Economies of scale both to the producers and consumers
- Low production capacity
- Absence of local content policy for SEZ investments
- Lack of adequate capital to make big investments
- Lack of trust, professionalism and reliability in the business sector generally.

To overcome these challenges, the group proposed the following actions.

- The capacity of SMEs should be bolstered so that they can produce quality output in the required quantities
- Local content policy/regulation should be applied in SEZ investments
- A detailed and comprehensive review of the SEZ scheme should be conducted to determine the exact scope of challenges and what needs to be done to address them
- Equal opportunity policy for all parts involved in business should be adhered to and promoted
- Compliance with financial regulations has to be emphasized
- Financial opportunities should be equitably promoted
- Correct information about SMEs is needed, including their projects and products
- The agricultural sector needs to be supported to directly link up with SEZs
- Sound business plans need to be developed that will attract the flow of capital to support growth of SMEs
- A trustworthy business culture is needed that ushers in reliability and compliance.

07

Key Messages and Recommendations

Dr. Adelhelm Meru

Dr. Meru commended both groups for a job well done in identifying key challenges in strengthening the SEZ scheme in Tanzania and its linkages with the local economy as well as mechanisms for addressing those challenges. In addition, he reiterated the challenges and proposed solutions from the speech by the Guest of Honour, Prof. Mkumbo, Minister for Industry and Trade. These included:

- Stakeholders are not sufficiently aware of the roles of SEZ and EPZ
- A comprehensive evaluation for both SEZ and EPZ programs needs to be conducted to identify precisely the issues to be addressed
- The capacity of LGAs to manage SEZs in their respective jurisdictions needs to be strengthened so as to bring about greater inclusion of SMEs. Similarly, the capacity of LGAs needs to be bolstered (especially by EPZA) so that the LGAs themselves can thrive in managing SEZ.
- The production capacity of both SEZs and SMEs needs to be strengthened so that they can produce quality goods, which are able to compete in competitive markets.

Further, Dr. Meru called upon LGAs to collaborate with other institutions, including ministries, and EPZA to prepare designated areas for investment and equip them with the infrastructure needed to spur investment. Finally, he stressed the need to strengthen PPP approach to build capacity and develop SEZ investments in Tanzania.

Dr. Adelhelm Meru.

08

Closing Remarks

Mr. John Mathew Mnali, Acting Director General, EPZA

Mr. Mnali thanked all stakeholders and participants for attending the workshop and Dr. Meru for facilitating the event so successfully. He also extended his thanks to the group chairpersons and secretaries for guiding their groups well and coming up with very commendable recommendations geared at improving the links between SEZs and the local economy. He noted that the EPZA will work on the recommendations and pursue collaboration with relevant institutions and sectors. He also thanked UONGOZI Institute for facilitating and organizing the workshop and asked that the Institute work to build the capacity of LGA staff to enhance their leadership skills to manage SEZ investments. After those brief remarks, Mr. Mnali declared the workshop closed.

Appendix 1: Program of the Workshop

Linkages Between Special Economic Zone Investments and the Local Economy
19 June, 2021 I Dar es Salaam

Moderator: Dr. Adelhelm Meru

TIME	EVENT
08:00 – 09:00 am	Arrival and registration
09:00 – 09:10 am	**Opening remarks** Mr. John Mathew Mnali, Acting Director General of the Export Processing Zones Authority (EPZA)
09:10 – 09:40 am	Opening speech Hon. Prof. Kitila Alexander Mkumbo (MP), Minister for Industry and Trade
09:40 – 10:00 am	**Presentation: The SEZ investments, its potentials and how LGAs and SMEs can maximise them** Mr. James Maziku, Director of Investment Promotion and Facilitation, EPZA
10:00 – 10:20 am	**Presentation: How can linkages with SEZ investments spur growth of SMEs in Tanzania?** Dr. Josaphat Kweka, Principal Researcher for ESRF and REPOA
10:20 – 11:00 am	Group photo and breakfast
11:00 – 13:00 pm	Visit: Benjamin William Mkapa Special Economic Zone Facilitator: Mr. Rigobert Massawe, General Manager of Tooku Garments Company About Tanzania Tooku Garments Company Ltd How the company is promoting linkages with local economy Opportunities available for SMEs, LGAs and local investors Challenges experienced in promoting linkages with local economy
13:00 – 14:00 pm	Lunch
14:00 – 14:30 pm	Discussion
14:30 – 15:30 pm	**Group discussion** LGAs discussion (Facilitator: Dr. Adelhelm Meru) SMEs and investors discussion (Facilitator: Mr. Godfrey Simbeye)
15:30 – 16:00 pm	Group presentation and discussion
16:00 – 16:20 pm	**Key messages and recommendations** Dr. Adelhelm Meru
16:20 – 16:30 pm	**Closing remarks** Mr. Kadari Singo, Chief Executive Officer of UONGOZI Institute

Appendix 2: List of Participants

NAME	ORGANISATION
Hon. Kitila Mkumbo (MP)	Minister for Industry and Trade
Mr. Adam Laban	Export Processing Zones Authority
Dr. Adelhem Meru	Former Permanent Secretary of the Ministry of Industry, Trade and Investment
Mr. Alfred Ngelula	Export Processing Zones Authority
Mr. Ally Baruan	Dar es Salaam City Council
Dr. Alykhan Somani	Somani Agro Exports Ltd.
Mr. Amri Matole	Export Processing Zones Authority
Mr. Andrew Mahiga	Tanzania Private Sector Foundation
Mr. Andrew Mshana	Morogoro Municipal Council
Ms. Angel Mushi	Export Processing Zones Authority
Mr. Aristides Mbwasi	Prime Minister's Office (Investment)
Mr. Bakari Gugu	DZCard (Africa) Ltd.
Eng. Benedict Lema	Confederation of Tanzania Industries
Mr. Benjamin Mrema	Arusha Municipal Council
Mr. Bosco Richard	Olivado Tz Ltd.
Ms. Caroline Israel	UONGOZI Institute
Eng. Caroline Valeria	Ministry of Industry and Trade
Mr. Chilla Moses	Kigamboni Municipal Council
Mr. Christopher Mgifi	Ministry of Industry and Trade
Mr. Deogratius Hella	Prime Minister's Office

Mr. Dickson Mfungo	Bunda District Council
Mr. Dingu Kamenyi	Ministry of Industry and Trade
Mr. Edison Tobias	Mbeya Municipal Council
Ms. Edna Mwera	Export Processing Zones Authority
Mr. Emanoel Alfred	UONGOZI Institute
Mr. Emmanuel Salyeem	National Environment Management Council
Ms. Ester Masele	Tanga City Council
Mr. Ezekiel Mpande	Ministry of Lands, Housing and Human Settlements
Ms. Flaviana Josephat	Morogoro Municipal Council
Mr. Frank Dafa	Confederation of Tanzania Industries
Mr. Fred Rugaimukamu	Kibaha City Council
Mr. George Kalumuna	Export Processing Zones Authority
Mr. George Nchimbi	UONGOZI Institute
Mr. Gerson Kira	Morogoro Municipal Council
Mr. Godfrey Simbeye	Red Advisory Ltd.
Mr. Goodluck Mollel	Arusha Municipal Council
Ms. Grace Makoba	Export Processing Zones Authority
Mr. Hafidhi Lupenu	Tanzania Revenue Authority
Ms. Happy August	Shinyanga District Council
Mr. Hassan Mnango	UONGOZI Institute
Mr. Hussein Kilemile	President's Office – Regional Administration and Local Government
Mr. Innocent Makomba	Ministry of Energy
Mr. Innocent Umbulla	Export Processing Zones Authority

Mr. Jameel Kassam	National Bank of Commerce
Mr. James Mkoziku	Export Processing Zones Authority
Mr. James Munisi	National Microfinance Bank Plc
Mr. James Ntalika	Tanzania Revenue Authority
Mr. Jeremiah Lubeleje	Morogoro Municipal Council
Mr. John Mauwa	Local Government Authority – Musoma
Mr. John Mnali	Export Processing Zones Authority
Dr. Josaphat Kweka	Talanta International Ltd.
Mr. Joseph Matara	Export Processing Zones Authority
Col. (rtd) Joseph Simbakalia	Former Director General of Export Processing Zones Authority
Ms. Joviness Ambakisye	Export Processing Zones Authority
Ms. Joyce Shundi	Tanzania Investment Centre
Ms. Joyce Mabushi	Yihaikerry Hyseas Trading Ltd.
Mr. Jubilate Muro	Business Registrations and Licensing Agency
Mr. Kaisi Kabenga	Tanzania National Business Council
Dr. Kelvin Munisi	University of Dar es Salaam
Eng. Kenneth Haule	Export Processing Zones Authority
Ms. Kokubanza Byakwaga	Export Processing Zones Authority
Ms. Latifa Mohamed	UONGOZI Institute
Mr. Leo Mavika	President's Office – Regional Administration and Local Government
Ms. Lilian Kimei	Somani Agro Exports Ltd.
Mr. Louis Kasera	Export Processing Zones Authority
Ms. Lucia Marandu	Tanga City Council

Ms. Magdalena Utouh	Fair Competition Commission
Ms. Margareth Simalenga	UONGOZI Institute
Mr. Malboard Kapinga	Bagamoyo District Council
Mr. Mantela Winani	Tanzania Sunflower Processors Association
Ms. Maria Mwangi	Mbeya Municipal Council
Mr. Maro Kohi	Tanzania Securities Ltd.
Mr. Maziku James	Export Processing Zones Authority
Ms. Mkwila Chichoma	AFRICADO Limited
Mr. Mosses Chillah	Kigamboni Municipality
Mr. Mzee Kilele	Tanzania Agriculture Development Bank
Mr. Nebart Mwapwele	Tanzania Chamber of Commerce, Industry and Agriculture
Ms. Norah Mishili	Tanzania Trade Development Authority
Mr. Oswald Karadisi	National Environment Management Council
Mr. Otarion Mshiu	Tanzania Private Sector Foundation
Mr. Panduka Yonazi	Export Processing Zones Authority
Mr. Patrice Mushi	UONGOZI Institute
Mr. Pingu Kamengi	Ministry of Industry and Trade
Ms. Rahel Ndosi	Export Processing Zones Authority
Mr. Ramsan Mwilangu	Ministry of Industry and Trade
Ms. Restituta Njuu	Ministry of Finance and Planning
Mr. Rigobert Massawe	Tanzania Tooku Garments
Mr. Robert Kwela	Kahama Municipal Council
Ms. Salama Mtindasi	Tanzania Food Processors Association of Women Entrepreneurs (Salama Food Products)

Mr. Salum Awadh	SSC Capital
Mr. Sayi Mayanda	Manyara District Council
Mr. Semkiwa Lugazo	Tanzania Revenue Authority
Mr. Stephen Mpeka	Export Processing Zones Authority
Ms. Suzan Mshakangoto	Ministry of Industry and Trade
Ms. Suzana Aroko	UONGOZI Institute
Mr. Twahil Bishanga	Ministry of Lands, Housing and Human Settlements
Ms. Veronica Ngerageza	Export Processing Zones Authority
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