

Proceedings of the workshop

**REGIONAL LEATHER CLUSTER
CAPACITY BUILDING:
THE TRIPLE HELIX APPROACH**



Hosted By:

**COMESA Leather and Leather
Products Institute
(COMESA-LLPI)**

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Editorial Team

Dr Mwinyikione Mwinyihija, Executive Director of COMESA/LLPI and Team Leader

Prof. Mekonnen Hailemariam, Leather Value Chain Expert, COMESA/LLPI

Mr. Nicholas Mudungwe, Cluster Expert, COMESA/LLPI

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- Prof A. B. Mandal – Director, Central Leather Research Institute (CLRI), India
- Dr. B. Chandrasekaran - Central Leather Research Institute (CLRI), India
- Dr. B. Madhan - -Central Leather Research Institute (CLRI), India
- Assoc.Prof.Dr. Mehmet Mete MUTLU, Ege University Turkey
- Mr. Robert Elliot Skidmore: Chief Competitiveness Sector, International Trade Centre (ITC)
- Mr. Frank D. Mugengyi – Senior Industry Advisor, African Union Commission
- Mrs. Fatuma Abdullah, Manager: Technical Assistance Programmes, AMSCO

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Acronyms

AALF	All African Leather Fair
AMSCO	African Management Services Company
CLRI	Central Leather Research Institute
COMESA	Common Market for Eastern and Southern Africa
COMESA/LLPI	COMESA-Leather and Leather Products Institute
ETP	Effluent Treatment Plant
CETP	Central Effluent Treatment Plant
EU	European Union
LIDI	Leather Industries Development Institute
MoU	Memorandum of Understanding
R&D	Research and Development
RISP	Regional Integration Support Program
SME	Small and Medium Enterprise
SMI	Small and Medium Industries
VC	Value Chain
WTO	World Trade Organization

Executive Summary

The Triple Helix Approach Workshop was held on the 18 to 19 June 2014 in Harare, Zimbabwe. The main thrust of the Workshop was to create a platform for the utilization of the Triple Helix (collaboration between Government, Private Sector and Academia) in developing SMEs footwear clusters in the COMESA region. A baseline survey that was undertaken by COMESA/LLPI in collaboration with AMSCO (African Management Services Company) revealed that SMEs in the region were operating in isolation with limited or no support from Government, Technical Institutions and Business Associations. In addition COMESA/LLPI has observed that Universities in the region were focusing mainly on teaching, thus producing graduates who have limited or no knowledge of the industry. SMEs are facing technology challenges, of which some of them could be addressed through reverse engineering by the Academia, with funding from Government or other interested stakeholders. Thus the Workshop was organized to create awareness of the importance of the Triple Helix in addressing the numerous challenges that the SMEs are facing.

Forty eight participants with diverse background and experience, drawn from Academia, Industrial, Private, Policy and Governmental sectors took part in the Workshop. They were from 8 COMESA member States, 1 and 5 regionally and internationally renowned organizations/institutions, respectively.

Thus the main objectives of the Regional Workshop were as follows:

- Improving COMESA Members States' capacity in the design, implementation and financing of Small and Medium Enterprises (SMEs) Clusters;
- Enhance the appreciation of the role of Universities in Research & Development in the development of SMEs Clusters;
- Developing a shared regional perspective on developing the leather sector clusters among the key stakeholders;
- Concerting with National Governments, Academia, Regional and International development partners on how the leather value chain can be taken to a higher level;
- Sharing current compliments and design strategies of replicating and upscaling them, taking into consideration the Governments, Academia, Private Sector and Development Partners perspectives; and
- Propelling with the Governments, Private Sectors, Academia and Development Partners the proposed Service Centres and Incubation Centres Development Model for the development of the Footwear and Leather Goods Clusters;

- The Current Core Team of the Leather Sector of the COMESA Region is composed of the Private Sector and Government Representatives and lacks Academia. To make it Triple Helix it should involve the Academia

The workshop format combined presentations and panel discussion sessions during the two days meetings. The presentations which were made during the two days Workshop demonstrated the importance of Triple Helix approach in addressing a plethora of issues, which are currently undermining the growth of the Leather Clusters in the region. Practical examples were shared on how the Indian and Turkish Governments, Private Sector and Academia have contributed to the growth of the leather sector in the two countries. Research aimed at improving production process, products and waste management, have been championed by the Academia with funding from both Government and the Private Sector. Other presentations which were made demonstrated the importance of the leather value chain in the COMESA region, and also demonstrated the potential impact that would be realized if both financial and technical support is provided to the SMEs Clusters.

Workshop participants identified a series of issues that affect the ability of countries to respond to current and emerging development issues in the leather sector. Based on these issues, a number of possible options that would help sustained development of the sector were explored. Specifically, the Workshop discussed and recommended the following:

- Triple Helix approach should be adopted at Regional and National levels to support the growth and development of the Sector;
- Clustering of SMEs was key to induce comparative competitiveness and potential recapitalization;
- Government support as a policy maker, venture capitalist and buyer, was fundamental in boosting the growth of the leather sector;
- Establishment of Services/Incubation Centres, with a commercial orientation was important in supporting the growth of SMEs;
- International collaboration should be spearheaded by COMESA/LLPI as a mechanism of reducing duplication and benefiting from economies of scale;
- There is need to create market linkages with the rest of the African Continent COMESA/LLPI has to continue its efforts in this regard by closely working with African Union Commission.

The Workshop was an important stride in furthering collaboration between academia, public and private sectors for the sustained development of the leather sector. The results of the Workshop demonstrated the importance of clustering of SMEs for

improved leather sector development in the region and validated the regional leather sector strategy.

Unsolicited positive feedback has been received from participants via email, as the stakeholders now appreciate the importance of the Triple Helix in improving the performance of the leather value chain in the COMESA region.

INTRODUCTION

The COMESA Region's livestock is approximately 51% and 11% of the African and the World livestock herd, respectively; however, its contribution to the global production and trade of leather, leather footwear and products is very weak, at less than 3%. It is estimated that the region is losing approximately USD 4.5 billion annually, through the export of raw hides and skins, instead of exporting finished products. The situation is set to remain as is, if National Government, the Private Sector and Academia are not working together to improve productivity, innovation and investment.

The Small and Medium Enterprises (SMEs) are the dominant business unit in the manufacturing of value added products such as footwear and leather goods, however they are facing many challenges that hinder the growth of the sector. The challenges being faced include: inadequate technical and managerial skills; limited access to suitable finance; inadequate or poor equipment/machinery and raw materials; small and erratic domestic market. The Uganda Summit of Heads of States of COMESA member States in 2012 reaffirmed the need for strengthening SMEs by adopting a Pro-SMEs theme. This commitment at the highest level is complimented with empirical evidence, which demonstrates that the organization of SMEs into Cluster cooperatives helps to reduce the level of challenges they are facing and could serve as engines to boost value addition, productivity and competitiveness in this untapped industry.

COMESA/LLPI is an autonomous intergovernmental Institution responsible for spearheading the development of the leather value chain in 19 COMESA Member States. The Institute is offering a comprehensive portfolio of assistance in promoting productivity, competitiveness, trade and regional integration in the leather industry.

The Institute organized the Regional Leather Cluster Capacity Building: The Triple Helix Approach workshop with the following objectives and expected outcomes:

Objectives

- Improve Members States' capacity in the design, implementation and financing of SMEs Clusters.
- Improve the appreciation of the role of Universities and R&D in the development of SMEs Clusters;
- Develop a shared regional perspective on developing the leather sector clusters among the key stakeholders;
- Concert with National Governments, Academia, Regional and International Development Partners on how the leather value chain can be taken to a higher level;

- Share current compliments and design strategies of replicating and up scaling them taking into consideration the Governments, Academia, Private Sector and Development Partners perspectives;
- Propel with the Governments, Private Sectors, Academia and Development partners the proposed Service Centres and Incubation Centres development model for the development of the Footwear and Leather Goods Clusters.

The Workshop was expected to deliver the following Outputs

- Improved capacity of Government, Regional Universities and SMEs to enhance the implementation of the Cluster program;
- A coherent regional implementation and fundraising plan supported by National Governments, Academia, Private Sector and Development Partners;
- Agreed regional model and structure for implementing Clusters in Member States and the Region;
- Improved awareness of the importance of the leather value chain in contributing to economic development and regional integration of the COMESA region;
- A regional results oriented strategy for the leather sector developed and attained the Council of Ministers Recommendation (Kinshasa, February 2014).

The Honorable Minister of Industry and Commerce's Opening Remarks

The statement of the Honorable Minister of Industry and Commerce was read by Madam Beatrice Mutetwa who is an Acting Permanent Secretary of the same Ministry. In his statement the Honorable Minister thanked COMESA/LLPI for choosing Zimbabwe to host the important Regional Workshop on the Triple Helix initiative and welcomed representatives from the various COMESA Member States and other organizations to participate in the workshop.

The Statement addressed the following important issues:

- The potential of the leather sector and the region's inability not to take advantage of it;
- The negative effects of lack of incentives to support the production and collection of on the quality of hides and skins;
- Trade liberalization has resulted in the dumping of synthetic and second hand products from outside Africa;

- The Zimbabwe Government's commitment to continue with the implementation of the leather sector strategy;
- The COMESA region and Africa is well endowed with livestock, however its contribution to the leather value chain is weak;
- The Sector has the potential to generate employment, exports and poverty alleviation;
- The Zimbabwe Government's commitment to work in the context of COMESA to support the development of the sector;
- The Triple Helix is critical in ensuring the development of the leather sector, as the collaboration among Government, Private Sector and Academia and is pivotal in supporting innovation and competitiveness; and
- The Ministry expected the Workshop to come up with practical and tangible recommendations that would enhance the unlocking of the sector's potential.

Presentation on the Importance of the Leather Value Chain Regionally and Globally

Dr M. Mwinyihija, the Executive Director of COMESA/LLPI presented a paper covering the following thematic issues:

- Importance of the Leather Value Chain Globally and in the COMESA Region;
- How much the COMESA Region is losing annually as a result of exporting raw hides and skins and partly processed leather; and
- The role of SMEs and their importance to Sustainable Development

The issues that were covered in this presentation are summarized as follows:

- Background on the establishment of COMESA/LLPI, and its current geographical coverage;
- The COMESA/LLPI's Medium Term Strategic Plan that is centered around 6 pillars, namely:
 - Regional Human Resource Development ;
 - Material and Technology Development;
 - Investment and Trade Promotion;
 - Information Dissemination
 - Consultancy and Extension Services;
 - Regional Integration Issues

- LLPI' s current intervention is geared towards Regional Trade Development; Employment Creation; Wealth Creation; Rural Development; Poverty Reduction and Gender Empowerment;
- Agro-based industries have far greater trickledown effect than mining and other high tech industries; thus, for Africa to tackle poverty issues, it should invest in the development of agro-based industries;
- The global leather value chain is estimated and USD100 billion, however, Africa despite contributing approximately 21% to livestock wealth, its contribution to the production of the value added products stands at 3%;
- The leather value chain is bigger than the combined trade of commodities such as meat, coffee, tea, sugar and rubber; however, it has not received comparable attention in Africa from policy makers, for instance in many Africa countries there are State Institutions spearheading the development and marketing of meat, cotton, tea, etc;
- The value addition thresholds increase significantly as we move up the leather value chain, hence, it was imperative that Africa should focus on the production of finished products for it to generate wealth that would enhance employment creation and poverty alleviation;
- Potential losses in the COMESA region due to the production and export of raw hides and skins is estimated at USD6 billion per annum;
- COMESA has a footwear market size estimated at 365 million pairs per annum; - potential employment creation of 365,000 direct jobs for footwear SME's (at 3 to 5 pairs/day/person) & several thousands in indirect employment (3/4 persons per SME);
- With an output estimated at 85 million pairs in the COMESA region and given the footwear market size highlighted above, the region has a shortfall of 280 million pairs per annum;
- The reflected market gap, as contributed to a sharp rise in imports of footwear from the Far East;
- It is, therefore, imperative that strategies should be put in place to enhance the productivity of SMEs in order to supply the identified gap;
- Thus, COMESA/LLPI has identified the Triple Helix approach as an important mechanism that would enhance the collaboration o Governments, the , Private Sector and Academia, which would in turn assist in addressing a plethora of challenges being faced in the leather value chain, consequently raising the performance of the leather value chain in the region;

- The performance of SMEs is constrained by a number of factors, chief among them are: inadequate machineries, raw materials and finance;
- The Footwear SMEs Sector in the COMESA regional is dominated by males, who command 86% of the activities in the subsector;
- Low productivity in the COMESA region was undermining competitiveness and growth of the SMEs;
- Hides and skins export tax policy should be complimented by other policies and incentives instruments in order to improve their impact;
- In order to boost the performance of the leather sector there is need to implement interventions, which are aimed at:
 - Improving competitiveness and efficiency;
 - Support R & D
 - Innovation
 - Collaboration;
 - Environmental, cleaner technologies and sustainability
- In conclusion, the following important pointers were highlighted:
 - Africa's renaissance has arrived with development of agro-based commodities and technological growth;
 - A case of unexplored opportunities in value addition, irrespective of vast endowment of resources, should be a basis of concern;
 - That a youthful, literate and well-experienced base of leather strata players be the driver towards tangible development of the sector;
 - A pulsating entrepreneurship in well-structured strategic and results-oriented frameworks be adapted to stimulate growth;
 - Triple Helix approach as a panacea to regional leather development forms the platform towards sustainability.

Situational Analysis of SMEs, COMESA/LLPI Past, Current and Future Interventions; Recorded and Projected Impacts

The presentation was made by Mr. N. Mudungwe who is the Cluster Development Expert at COMESA/LLPI. The presentation addressed the following issues: Situational Analysis of SMEs, COMESA/LLPI's Past, Current and Future Interventions; Recorded and Projected Impacts.

The main issues of the presentation were:

- Recap of the constraints SMEs are facing, namely machinery, finance, raw materials, etc;
- The predicament of SMEs is being worsened because they are operating in complete isolation, with limited or no support from Governments, Academia and other support institutions; furthermore, there was limited or no collaboration amongst the SMEs themselves, because of fear of perceived competition and lack of trust;
- Challenges associated with designing an intervention strategy, given the diversity of constraints;
- It is imperative to note that the cluster theory recognizes that the cause of underperformance among firms may not be attributable solely to firm size, but rather to the isolation phenomenon that these small firms often experience; cluster development, therefore, seeks to harness the competitive benefits from collaborative or joint action among businesses and SMEs operating in the same business or sector, thus, it essentially works towards the development of the cluster eco-system;
- Participation in key regional trade fairs acted as a key opener to make SMEs appreciate the quality gap between their products and those made by established enterprises and to also realize the importance of collaboration and joint actions;
- The interventions in skills development, cluster development and trade exposure has partially enhanced the performance of SMEs in the region and has created a big appetite for the services COMESA/LLPI is providing;
- SMEs and national Governments from across the region are not actively demanding for services such as capacity building, machinery, trade fair participation and strategy formulation support, however, despite the budgetary constraints, COMESA/LLPI has responded partially;
- In line with this, over 100 SMEs participated in AALFs in Ethiopia (2012-2014) and 120 SMEs have participated in Fairs in Uganda, Kenya , Rwanda, Zambia and Zimbabwe (2012-2013);
- Skills and business coaching trainings were conducted and other interventions made by COMESA/LLPI resulted in public sector support to SMEs by allocating working space, funds and government procurement to local enterprises;
- Notable impacts have been recorded in productivity, intra trade and formalization of SMEs, for example;

- SMEs are now actively involved in intra trade with regard to procurement of inputs and trade in finished products; (An Ethiopian Cluster has clinched a US\$700,000 footwear export deal to Kenya; a Ugandan SME has imported leather value at US\$ 70, 000 from Ethiopia since the beginning of 2013 and is also exporting footwear to Kenya);
- SMEs Clusters have been legally registered and are working on building their own resource base (Kitwe and Bulawayo clusters from Zambia and Zimbabwe), in addition to this national associations have gained strength and prominence for example Footwear and Leather Goods Manufacturers and Exporters Association of Uganda; and;
- Value addition and opening of new production lines for footwear (a footwear factory was opened in Burundi and a Hides and Skins Exporter in Zimbabwe has signed an agreement to enter into contract tanning, and then export semi processed leather);
- The future interventions should focus on the establishment of service and incubation centres, which are financially sustainable (supported by a revolving fund and SMEs paying for their services);
- COMESA/LLPI has already designed a Service/Incubation Model, with a strong commercial bias in order to ensure sustainability.

Discussion on Presentations One and Two (Importance of Value Chain and Situational Analysis)

The discussion panel was composed of the business persons who were drawn from five COMESA Member States. The objective of the discussion was to generate regional perspectives on issues, which were covered in the first and second presentations. Additionally to build up a body of evidence on issues, opportunities and interventions, which are currently taking place in the COMESA region.

- Mr. S. Nganga – Regional SME Committee Chairperson and a Footwear Manufacturer in Kenya;
- Ms V. Byoma – Vice Chairperson of the COMESA Leather Sector Core Team and Leather Goods Manufacturer in Uganda;
- Mr. C. Shoko - Member of the Zimbabwe Core Team and a Hides and Skins Merchant in Zimbabwe;
- Ms. Phillipa - Managing Director of Gone Rural, Swaziland;
- Mr. Berhanu Negus - Deputy Director; Leather Industries Development Industries of Ethiopia

The summary of issues which emerged from the discussions were as follows:

- Confirmed the issues, which were highlighted in the previous two presentations, and also the proposed intervention strategies, as a mechanism of reducing transaction costs of SMEs;
- It was imperative that the SMEs sectors should be organized in the form of associations and clusters, as a mechanism of boosting their visibility and economic strengths, as joint action on the supply and demand side reaps the benefits of a common opportunity, by reducing the procurement cost and also gains from economies of scale by being able to service big orders;
- The need for integrating indigenous knowledge in craft with leather to produce designer products, which would generate higher returns for SMEs, as a good entry point into the ethical fashion business;
- The dilemma associated with the need to move up the value chain and the dynamism of the leather fashion, which has made African tanners to focus on readily tradable semi processed products;
- Use of export tax was important, however, it should be completed with other policy incentives;
- Government should allot a given percentage of their procurement to national manufacturing enterprises;
- Despite the indicated huge demand side gap in leather products, SMEs are struggling to market their products, hence, mechanisms should be put in place to improve market access to them.

The Turkish Triple Helix Approach in Supporting the Development of the Leather Sector

The presentation was made by Assoc. Prof. Dr. Mehmet Mete MUTLU, who is a lecturer at Ege University, Turkey in the Department of Leather Engineering. The presentation covered the following thematic issues:

- The Experience of Ege University in supporting the development of the Leather Sector in Turkey;
- The Role of the Turkish Government in supporting the Leather Sector;
- How is the Private Sector organized?
- How are the Turkish Government, Academia and the Private Sector interfacing?
- Lessons for the COMESA Region

The presentation highlighted the following issues:

- The size of the Turkish leather industry in terms of enterprises, employment, turnover and exports was more than 10 fold the size of her livestock wealth, which is an indication that technology and collaboration can make an industry competitive even in the absence of a huge resource base;
- Leather and leather products export in Turkey which was 837 million in 2009 exceeded 1.6 billion USD in 2013;
- In partnership with industries in the leather sector Ege University organizes leather design and production competition on yearly bases and winner's designs are produced and put in to market, this reduces the cost of products designing as this is done by students, in addition it also makes students relevant to the industry;
- The collaboration among the stakeholders, namely Government, Private Sector and Academia has boosted the performance of the industry;
- The high level of collaboration among sector players, through the formation of a range of associations, have helped to build synergies and strength of the leather value chain;
- High innovative strategies linked to tourism has enhanced the export earning of the sector;
- The main role of Ege University's Department of Leather Engineering is to :
 - Train engineers for the leather industry;
 - Make researches and dissemination of information, which are relevant to the industry following the latest science and technologies;
 - Supporting the industry;
 - Improving the cooperation with international partners, as mechanism of generating new cross cultural knowledge
- The Ege University department of leather engineering has well equipped laborites to support R & D and also to undertake quality testing and certification for the leather industry; this activity enhances the Academia relevance to the industry;
- The University is collaborating with many universities across the globe;

- The following are some of the important events, which have been undertaken by the University to support knowledge exchange and information development to support innovation in the leather industry:
 - 2004 – I. National Leather Symposium
 - 2009 – I. International Leather Engineering Congress
 - 2011 – II. International Leather Engineering Congress
 - 2013 – XXXII IULTCS Istanbul Congress
 - 2015- IAFLI, on May 21-22nd.
 - Leather Design and Production Competition 2011
 - Leather Design and Production Competition 2012
 - Leather Design and Production Competition 2013
 - Leather Design and Production Competition 2014

- R & D in the industry is being supported by Government through specific institutions

The Indian Triple Helix Approach in Supporting the Development of the Leather Sector

Three presentations were made by Central Leather Research Institute (CLRI) of India, with the main focus in the following areas:

- The Experience of CLRI in Supporting the Development of the Leather Sector in India;
- The Role of the Indian Government in Supporting the Leather Sector;
- How is the Private Sector organized;
- How is the Indian Government, Academia and the Private Sector interfacing;
- Lessons for the COMESA Region.

The main theme, which emerged from the presentations by the three Experts from India, was that the COMESA countries can learn from the Indian experience and thus avoid the costly mistakes, which were made in India. CLRI has worked with the Industry and Government to resolve the challenges of pollution, quality improvement and competitiveness. In addition, India was ready to support COMESA countries to improve the performance of the industry. An MOU between CLRI and COMESA/LLPI is already in place, and this can be used as a platform to support the Leather Industry across the COMESA region.

Presentation by Prof. Dr Asit Baran Mandal, Director, Central Leather Research Institute

- Highlighted the collaborative activities with Ethiopia that are aimed at improving the competitiveness of the Ethiopian Leather sector, CLRI activities in Ecology Solutions supported the tanning sector and, in Tamil Nadu, saved about 700 tanneries from closure;
- Its New Innovations (Processes) involve Cleaner production, value addition and waste reduction;
- Gave highlights of Technology solutions for solid waste management, waste treatment, removal of organics from water and effective CETP operation and maintenance;
- CLRI: Leading in the Fashion World; Fashion Forecasting for Global Leadership
- New product innovations, range building of shoes, garments, leather goods, R & D : diabetic footwear;
- Value added products from tannery and slaughter house byproducts, leather-cotton blended fabrics;
- Enzymes in leather processing.

Presentation by **Dr. B Chandasekaran**

In introducing his presentation he highlighted the importance of Government commitment in supporting the development of the leather sector and the development of partnership with Academia and Private Sector. The key issues he highlighted are as follows:

- The Leather Sector is important in the Indian economy in terms of employment generation and export earnings;
- Strong production base - Annual production about US \$ 12 Billion;
- Export about US \$ 6 billion (2013), with an annual growth of more than 10% per annum;
- Value-added finished products presently constitute 80% from a mere 7% in 1956-57;
- Nearly 70% production takes place in Small and Medium Enterprises (SMEs)- About 42,000 units registered under SSI;
- About 2.5 million workforce – Rural & semi-urban areas;

- Women constitute 30% of the work force in the organized units;
- Increasing importance to occupational safety and work environment;
- All the units in the country are connected to pollution control devices (Effluent Treatment Plan (ETP) or Central Effluent Treatment Plant (CETP)) and huge investments have been made to comply with pollution control norms;
- Policy Interventions/Support from Government:
 - Under World Trade Organization (WTO) regime, restrictions were imposed on export of semi-processed leathers (60% for raw, wet blue and crust and 15% for EI Leathers);
 - Later Cash incentive schemes replaced with duty drawback/import license for chemicals and consumables;
 - Duty-free import of raw materials in different stages and finished leathers;
 - Industry participated Export Promotion council(CLE);
- The industry is recognized as a strategic sector by the government of India, thus, specific interventions have been supported by Government; for example in June 2005, the Government initiated a US\$ 64 million 'modernizing scheme' called the 'Integrated Leather Development Programme', whereby all leather tanning and product units were eligible for modernization assistance;
- Some of the key roles of CLRI for the development of Indian Leather Sector among other are:
 - It played a key role in the transformation of Industry- From export of semi-processed leathers to finished leathers/through technology transfer and training;
 - Education and Training for providing quality manpower to man the tanning industry-60% of the experts in the industry are alumni of CLRI;
 - Supported the modernization of the tanning industry through process control measures;
 - It conducts annual event called LERIG (Leather Research Industry Get-together) for dissemination of information to the industry;
 - It assisted 700 tanneries in Tamil Nadu which were facing closure due to pollution emission, consequently saving thousands of jobs;

- It co-ordinated Leather Technology Mission Projects for the technology up gradation of industry, demonstration of Cleaner Processing Methods, empowerment of rural tanning/product sector;
- The presentation also covered some of the interventions CLRI was making in Africa and the potential of doing the same in the rest of the COMESA region in partnership with COMESA/LLPI;
- The intervention in Ethiopia has generated the following outcomes:
 - Organizational Restructuring to fine-tune Leather Industries Development Institute's (LIDI) services to the leather sector;
 - Establishment and strengthening of Academic Programs (Through Triple Helix Model) B.Sc., M.Sc., and Ph.D.;
 - Curriculum design and development of learning materials for Vocational Training in Leather, Footwear, Leathergoods & Garments;
 - Establishment of R&D Facility, Environment Technology Department;
 - Strengthening of Chemical & Physical Testing

Presentation by Dr. B. Madhan

The leather industry has been associated with environmental pollution over the years, and in many COMESA countries there is a big risk, given that many tanneries are not equipped with the necessary technologies to deal with effluent treatment in an environmentally sustainable manner.

The main focus of the presentation was on environmental sustainability, and the main highlights of the presentation were as follows:

- Leather Manufacturing, as any other industrial process, generates wastes;
- All the three forms of wastes (viz. solid wastes, wastewater and gaseous emissions) are generated from leather manufacturing;
- Conversion of 1 ton of skins / hides into leather leads to the generation of about 25-40 m³ of wastewater and 0.5 to 0.7 tons of solid wastes;
- Waste generation cannot be averted in all the cases. Only a multi-pronged approach of opting for alternatives, recycling, reuse, treatment and secured disposal could bring about sustainability;

- Africa can learn from Indian experience and opt for fool-proof technological options aiming of sustainability;
- The ideal scheme of manufacturing system for attaining environmental sustainability shall be based upon appropriate options for addressing each waste entity suitably and generate valuable products out of some of the wastes;
- The presentation demonstrated scientifically production method, which can be used in order to reduce the production of waste and to build environmental sustainability;
- Can be an agent for sustained development of Leather Industry in COMESA countries.

ITC Collaboration with Regional Organizations, Governments and the Private Sector

Mr. Robert Elliot Skidmore: Chief Competitiveness Sector International Trade Centre (ITC).

The presentation focused on how ITC could support the linking of SMEs to value chains through sector development and improvement of key support services, thus the following imperatives were highlighted during the presentation:

- The following are interventions, which have been undertaken in partnership with COMESA
 - 2004-2006: Regional Leather Sector Strategy;
 - 2004-2012: Leather-line Africa Platform, Buyer Seller Meeting, and Study Tours and Meet in Africa;
 - 2009- 2014: Ethical Fashion;
 - 2011-2012: Review of Regional Strategy;
 - 2011-2014: Zimbabwe National strategy, VC scoping tours and support with implementation.
- The intervention approach has been participatory, to ensure that issues are identified and solutions are provided by the Stakeholders;’ this approach focuses on the key players namely Government, Private Sector and commercially driven Business Models;
- The presentation also summarized the main objectives of the Regional Leather Strategy and its Objectives;
- ITC is working with COMESA/LLPI to design a project/programe to support the development of the leather value chain;

- The formulation process is supported by a participatory process;
- A PROJECT with 4 pillars:
 - Understanding opportunities & selecting product-markets;
 - Improving leather enterprise competitiveness and finding the right buyers and partners;
 - Improving environment and services to Industry/sector;
 - Promoting investments.
- Expected key results of the project highlighted:
 - Sector development & value chain roadmaps;
 - Linking SMEs with buyers;
 - Improvement of key services to SMEs;
 - Investments for value addition in leather value chain in COMESA.

AUC Perspectives on the Development of the Leather Sector in Africa

Mr. Frank D. Mugenyi – Senior Industry Advisor, African Union Commission, made a presentation which highlighted a number of points that Africa has invested a lot in designing industrialization frameworks; however, the implementation has been very weak. He emphasized that there was a need for a paradigm shift, which would see Africa being transformed from a net exporter of raw materials to the export of finished products. He highlighted the following as the key important action points that should be implemented if Africa was to industrialize:

- Coherent Policies –Industrialization, Trade and Finance Policies –Developed, Coherent and harmonized-
 - Based on Value Chain Approach and Benchmarking;
- Private Sector and Institutional Development and strengthening -
 - Working with partners and key stakeholders;
- Quality Infrastructure – standards, conformity, (Not to drown out our SMIs and SMEs);
- Information and Business Intelligence – Data – Investment Monitoring Platform (IMP)
- Alternative Resource Mobilization – for Industrialization:
 - R&D – Innovation,
 - Incubation,

- Equity Finance,
- Venture Capital.

Presentation of AMSCO: Inside Track into Inclusive Business

Mrs. Fatuma Abdullah, Technical Assistance – Manager, AMSCO made a presentation that gave background information of AMSCO and its Client Portfolio and AMSCO's & COMESA/LLPI collaborative activities. Main issues highlighted were:

- AMSCO establishment history and institutional profile;
- Working through Private Sector to promote inclusive business in Agriculture & Agri-Business, Financial Inclusion, Manufacturing/Extractive/Service Industries, Conflict Affected States/Fragile States;
- AMSCO's and COMESA Collaboration Purpose – (to contribute towards the attainment of the COMESA/LLPI's Medium Term Strategic Plan(MTSP) 2010-15, to boost value addition, intra-trade and employment creation; consequently contribute towards poverty reduction in the region;
- Objectives of the Baseline Study and Expected Outcomes of the Project;
- Findings of the Baseline Study that encompassed the main problems identified during the assessment of the Service Centers in 5 countries (i.e. Kenya, Rwanda, Uganda, Burundi and Zimbabwe), lack of machines and equipments, professional knowledge, financial resources, adequate location and materials and components; very low capability to cooperate with local companies, non-availability of a list of services, no international collaborations and some centers are acting as competitors of the companies they should help to grow;
- Proposed solution that included Reorganization of the Existing Service Centers and the Creation of Incubators with possible new and Common Asset of the Service Centers.

Presentation of the Draft COMESA Regional Leather Value Chain Strategy

Mr. Nicholas Mudungwe, Cluster Expert at COMESA/LLPI made a presentation on the Draft COMESA Regional Leather Value Chain Strategy. He first recalled Chapter 12 of the COMESA Treaty that recognizes the importance of Cooperation at Regional Level in the area of Industrial Development and then gave highlights on the development process of the COMESA Regional Sector Strategy for the Leather Sector. The main issues in his presentation were:

- Active role played by the Private Sector in the crafting of the Strategy (60% of participants in all strategy development meetings were from the private sector);

- More than 200 sector stakeholders drawn from 16 COMESA member States were involved in the development of the Strategy;
- The results of SWOT (Strength, Weakness, Opportunities and Treats) analysis for the COMESA leather value chain, effected during the strategy development process;
- Broad issues impacting negatively across the leather value chain identified by stakeholders that were: Poor animal husbandry practices; Inadequate, unsuitable or absent slaughter facilities; Poor quality on value added products; Poor marketing of leather commodities; Absence of sector specific policies; High cost of finance; Production of poor quality products due to inadequate technology; Lack of technical and managerial skills; Weakness of Training and Technical Institutes; and Weakness of Associations;
- The Vision of the Regional Leather Sector Strategy (“To be the lead contributor to the COMESA region’s economic development and livelihoods in a sustainable manner”);
- The Mission of the Regional leather sector Strategy (“To create an enabling policy and legal environment, strengthen institutions, improve access to finance, promote trade, information sharing, value addition and quality improvement of leather and leather products in the COMESA region”);
- The Strategic Objectives of the Regional leather sector Strategy:
 - Improve access to affordable finance,
 - Create an enabling policy, legal environment and strengthen institutional framework,
 - Facilitate the improvement of overall quality,
 - Improve information and marketing systems.

Mr. Mudungwe’s presentation was followed by thorough discussion and validation of the Strategy. It was also agreed to implement necessary institutional interventions that improve leather sector development and align individual member States Strategies, Operational plans, and Objectives with that of the Region.

The draft strategy was proposed by Engineer Suliman from Sudan and Seconded by Mr David Daka from Zambia. Thus, the document will now be tabled in future Ministerial Meetings in line with the mandate, which was given to COMESA/LLPI during the Summit.

Stories of Change: Discussion and General Comments

What lessons can the COMESA, Governments, Private Sector and Academia learn from the Triple Helix Approach (collaboration between Government, Private Sector and Academia) to improve the performance of the leather Value Chain?

- Madam Diana Ntamu- Director of Entrepreneurship - Makerere University Business School, Uganda;
- Prof Sitwala Mundia – Vice Chancellor - University of Copperstone, Zambia;
- Engineer Suliman – General Manager of a Tannery in Sudan and Member of the Regional Core Team;
- Mr. Sam Miller – General Manager of Imponente and the Chairperson of Zimbabwe Leather Apex Council;
- Mr. Bede Bedetse – General Manager, Afritan Burundi;
- Member States;
- Eng F. Odongo – Ministry of Industry, Trade and Cooperatives, Uganda;
- Ministry of Industry and Trade, Zimbabwe;
- KLDC- Kenya.

Representatives of Public/Private institutions from Burundi, Kenya, Ethiopia, Sudan, Swaziland, Uganda, Zambia and Zimbabwe made brief presentations/discussions that highlighted what lessons can the COMESA, Governments, Private Sector and Academia learn from the Triple Helix Approach and how the work of COMESA/LLPI influenced the dynamics of the leather sector in their respective institutions/countries.

- Mr. Bède Bedetse, AFRITAN owner and manager, Burundi, recognized the input and support from COMESA/LLPI which has motivated him to produce finished leather and also to set up a footwear factory. He indicated that the future is bright as his business has evolved over the year to produce quality wet blue, which is feeding into some of the best world producers who are based in Italy;
- Mr. Paulos Endeshaow, the Ethio-International Footwear Cluster Cooperative Society Chairman, indicated that through the COMESA/LLPI's market linkage assistance his cluster cooperative exported 700,000 USD worth of footwear to the region in the last 6 months. His cluster has a membership of 1200 SMEs and its development has been supported by Government, which provided working space, which saw SMEs being moved from operating in open markets to well constructed buildings serviced with all the necessary utilities. He admitted that the SMEs are still facing some challenges, however he was confident that those challenges will be gradually addressed, as more partners come along to support them. He mentioned that COMESA/LLPI has initiated a process to support them in the development of a strategy for the cluster and he was of the view that this would assist in developing a joint roadmap to deal with problems in a systematic manner;

- Eng. Mohamed Suliman, Regional Core Team Member and Chairperson of the leather sector association from Sudan. He indicated that the entry of COMESA/LLPI in Sudan has assisted in catalyzing the strengthening of collaboration between Government and the Private sector. The Sudanese Government's appreciation of the importance of the leather sector has improved tremendously over a short period and it is now ready to support it. He also thanked COMESA/LLPI for the Shoe Making Training sponsored by the Institute and held in Khartoum as well as for the currently underway Curriculum Development and Strategy Development activities. This, he said, was important in addressing the skills gap, which was currently very wide in Sudan;
- Mrs. Diana Nandagire Ntamu, Director of Makerere University Business School Entrepreneurship Centre, Uganda and Mrs. Byoma, Chairperson of the Ugandan Leather Association and Vice Chairperson of the Regional Core Team, briefed workshop participants on activities conducted in collaboration with COMESA/LLPI in Uganda. The Training of SMEs in Leather Footwear Making, Feasibility Study on Service/Incubation Center and the involvement of the Makerere University Business School staff in the preparation of Leather Sector Manual and Curriculum Development were some of the examples. The Uganda Government has also responded positively by allocating a big space, 600m² building allotted by the Ugandan government to serve as incubation center for SMEs in the leather sector. The two Ugandan presenters recognized that LLPI's proactive involvement in Uganda has assisted significantly in catalyzing the interaction between the Private Sector, Government and Academia. Makerere Business School is now ready to work with the Private Sector and Government to support the leather sector in Uganda;
- Prof. Sitwala Mundia made brief presentation that highlighted Copperstone University's partnership with COMESA/LLPI to support the leather industry in Zambia through spearheading the Clustering of footwear artisans, conducting training in leather footwear making and mentorship and facilitating the formation of the Copperbelt Leather Industry Cluster. Copperstone University also participated in the COMESA/LLPI activities of Leather Sector Manual and Diploma Level Curriculum Development, both anticipated to be adopted as standard regional programmes. Prof. Sitwala finally said that Copperstone University greatly upholds and cherishes the working relationship with COMESA/LLPI.

Show casing of Leather Products from the Regional SMEs

SMEs from Burundi, Ethiopia, Kenya, Malawi, Swaziland, Uganda and Zimbabwe showcased their products during the two day Regional Workshop. This was organized to demonstrate to participants that the SMEs have the capacity to produce goods of respectable quality. See below, some pictures of the footwear and leather products which were showcased during the workshop.



Resolutions/Recommendations

The resolutions/recommendations forwarded by the participants after the two days Meeting are presented herebelow:

- Triple Helix approach should be adopted at Regional and National levels, to support the growth and development of the Sector;
- Clustering of SMEs was key to induce comparative competitiveness and potential recapitalization;
- Government support as a policy maker, venture capitalist and buyer, was fundamental in boosting the growth of the leather sector;
- Establishment of Service/Incubation Centres, with commercial orientation was important in supporting the growth of SMEs;
- International collaboration should be spearheaded by COMESA/LLPI as a mechanism of reducing duplication and for benefiting from economies of scale;
- There is need to create market linkages with the rest of the African continent, and COMESA/LLPI has to continue its efforts in this regard by closely working with African Union Commission;

- Strengthen the Triple Helix approach as a mode of creating momentum to the leather sector development by concretizing on its ;-
 - Stability,
 - Consistency,
 - Sustainability,
 - Resourcefulness,
 - Employability,
 - Accruals,
 - Social security.
- Create harmony in all the National strategies, Regional and LLPI Strategy in understanding the objectives, capabilities, activities and achievements in the leather sector;
- The Current Core Team of the Leather Sector of the COMESA Region is composed of the Private Sector and Government Representatives and lacks Academia. To make it Triple Helix it should involve the Academia.

Closing Remarks

Dr. Mwinyikione Mwinyihija, Executive Director of COMESA/LLPI thanked COMESA Secretariat and RISP III Program for their supports as well as the participants for the collaboration and input that contributed to a successful Workshop.

Dr. Mwinyihija recalled the objectives and expected outputs of the workshop and indicated their successful accomplishment by mentioning important agreed issues and emerging consensus on the way forward.

Finally, Dr. Mwinyihija after reiterating the COMESA/LLPI's deep commitment to the sustainable development of the leather sector in the region, expressed his best wishes for safe journey back to their respective destinations to all participants.

Vote of Thanks

Mrs. Victoria Byoma, representing workshop participants, presented a vote of thanks to COMESA/LLPI and its Executive Director, COMESA/Secretariat and the EU-RISP III Program for organizing and making this Workshop a reality.

Appendix 1: Workshop Program



Leather for Health, Wealth and Luxury

REGIONAL LEATHER CLUSTER CAPACITY BUILDING: THE TRIPLE HELIX APPROACH

Hosted by
COMESA- Leather and Leather Products Institute

WORKSHOP PROGRAM

Venue: Cresta Lodge, Harare
HARARE, ZIMBABWE
18th to 19th June 2014

Objectives of the Regional Triple Helix Meeting of the Leather Cluster

1. Improve Members States' capacity in the design, implementation and financing of SMEs Clusters;

Improve the appreciation of the role of Universities and R and D in the development of SMEs Clusters;
2. Develop a shared regional perspective on developing the leather sector clusters among the key stakeholders;
3. Concert with National Governments, Academia, Regional and International Development Partners on how the leather value chain can be taken to a higher level;
4. Share current compliments and design strategies of replicating and upscaling them, taking into consideration the Government, Academia, Private Sector and Development Partners perspectives;
5. Propel with the Governments, Private Sectors, Academia and Development Partners, the proposed Service Centres and Incubation Centres development model for the development of the Footwear and Leather Goods Clusters.

Expected Outputs/Results

- Improved capacity of Government, Regional Universities and SMEs to enhance the implementation of the Cluster program;

- A coherent regional implementation and fundraising plan supported by National Governments, Academia, Private Sector and Development partners;
- Agreed regional model and structure for implementing Clusters in Member States and the Region;
- Improved awareness of the importance of the leather value chain in contributing to economic development and regional integration of the COMESA region;
- A regional results-oriented strategy for the leather sector developed and attain the Council of Ministers Recommendation (Kinshasa, February 2014)

Time	Activities	Responsibility
WENESDAY, 18TH JUNE 2014		
08:30 – 09:00	Participants' Registration	COMESA Secretariat
09:00 – 09:30	Opening Session <ul style="list-style-type: none"> • Opening Prayer • Welcome Address: 	Master of Ceremony Permanent Secretary :Ministry of Industry and Commerce, the Republic of Zimbabwe
09:30 - 0945	<i>Official Opening</i>	Honourable Mr Bimha (MP) Minister of the Ministry of Industry and Commerce, the Republic of Zimbabwe
09:45 – 10:00	<i>Key Note Address</i>	H.E Mr. Sindiso Ngwenya, the Secretary General of COMESA
10:00 – 10:30	Two Themes Presentation <ul style="list-style-type: none"> • Importance of the Leather Value chain globally and the COMESA Region • How much is the COMESA Region Losing Annually? 	Dr. Mwinyikione Mwinyihija: Executive Director of COMESA/LLPI
10:30 – 11:00	Tea Break	
11:00 – 11:30	Participants Introduction and Affiliations	Master of Ceremony
11:30 - 11:45	<ul style="list-style-type: none"> • Introduction of the Role of SMEs and their Importance to Sustainable Development 	Dr. Mwinyikione Mwinyihija: Executive Director of COMESA/LLPI
11:45 – 12:15	Situational Analysis of SMEs, COMESA/LLPI Past, Current and Future Interventions; Recorded and Projected Impacts	Mr. Nicholas Mudungwe: Cluster Development Expert COMESA/LLPI
12:15 – 13:00	Discussion	Panel: Private Sector <ul style="list-style-type: none"> • Mr. S. Nganga – Chairman Regional SME Committe Chairperson • Ms V. Byoma – Vice Chairperson the COMESA Leather Sector Core Team • Mr. C. Shoko Member of the Zimbabwe Core Team • Mr. Paulos: Chairperson EIFCCOS • Ms. Phillipa: Gone Rural • LIDI, Ethiopia
13:00-14:00	Lunch	
14:00-14:30	Four Themes <ul style="list-style-type: none"> • The Experience of Ege University in Supporting the Development of the Leather Sector in Turkey: The Role of the Turkish Government in Supporting the 	Ege University Turkey

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	<p>Leather Sector;</p> <ul style="list-style-type: none"> • How is the Private Sector organized • How is the Turkish Government, Academia and the Private Sector interfacing • Lessons for the COMESA Region; 	
14:30-15:00	<p>Four Themes</p> <ul style="list-style-type: none"> • The Experience of CLRI in Supporting the Development of the Leather Sector in Indian: The Role of the Indian Government in Supporting the Leather Sector; • How is the Private Sector organized • How is the India Government, Academia and the Private Sector interfacing • Lessons for the COMESA Region; 	<p>Prof A. B. Mandal -Central Leather Reserach Institute, India</p> <p>Dr. B. Chandrasekaran -Central Leather Reserach Institute, India</p> <p>Dr. B. Madhan - -Central Leather Reserach Institute, India</p>
15:30-16:00	Tea Break	
	ITC Collaboration with regional organizations, Gvts and the Private Sector in promoting Competitiveness: Lessons for COMESA Member States, Academia and the Private Sector	Mr. Robert Skindmore: Chief Competitiveness Sector International Trade Centre
16:00 – 16:30	AUC perspectives on the Development of the Leather Sector in Africa	Mr. F.D. Mugengyi – Senior Industry Advisor, Africa Union Commission
16:30	House Keeping Issues, Tea Break and End of Day	
THURSDAY, 19TH JUNE 2014		
08:30 – 09:15	RECAP OF PREVIOUS DAY PROCEEDINGS	Coordinating Team COMESA/LLPI
09:15- 10:30	<p>Discussions: What lessons can the COMESA Governments, Private Sector and Academia learn from the Triple Helix Approach (collaboration between Gvt, Private Sector and Academia) to improve the performance of the leather Value Chain</p>	<ul style="list-style-type: none"> • Makerere University Business School • University of Copperstone • University of Khartoum • Member States • Uganda – Eng F. Odongo • Ministry of Trade – Sudan • Ministry of Industry and Trade Zimbabwe • KLDC- Kenya
10:30 – 11:00	Tea Break	
11:00 – 11:30	Presentation of the Draft COMESA Regional Leather Value Chain Strategy	Prof. Mekonnen and Ato N. Mudungwe – COMESA/LLPI
11:30 -13:00	Discussion and Validation of the Strategy Vision and Objectives	Prof. Mekonnen and Ato N. Mudungwe – COMESA/LLPI
13:00-14:00	Lunch	
14:30-1530	<p>Stories of Change: Discussion</p> <ul style="list-style-type: none"> • How the work of COMESA/LLPI influenced the dynamics of the leather sector in: <ul style="list-style-type: none"> ○ Uganda – Bobie Leather – Robert ○ Burundi – Mr. B. Bedetse ○ Ethiopia ELICO – Gizaw Molla ○ Zimbabwe – Clement Shoko ○ Sudan – Eng. Suliman 	Master of Ceremony
15:30-15:15	Tea Break	
15:15 - 1540	Summary of Issues and Way Forward	Dr. Mwinyikione Mwinyihija: Executive Director of COMESA/LLPI

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15:40-17:00	•Closing remarks	COMESA/LLPI and Ministry
17:00-1715	Vote of Thanks	
17:15	Tea Break and end of Day	

WORKSHOP SECRETARIAT

Coordinators: Prof. Mekonnen and Mr. Nicholas Mudungwe

Administration: Ms. Harriet Malindi

Appendix 2: List of Participants

List of participants for the Regional Leather Cluster Capacity Building: Triple Helix Approach, held at Cresta Lodge, Harare, Zimbabwe from 18 – 19 June 2014

BURUNDI

1. Mr. Bede Bedetse, General Manager, Ministry of Trade and Industry-Afritan, P O Box 1244, Bujumbura, Burundi, Tel: 257 76660060, Fax: 257 22227564, Email: afritanleather@yahoo.fr

ETHIOPIA

2. Mr. Berhanu Negus, Coordinator, Product and Productivity, Leather Industry Development Institute. Addis Ababa, Ethiopia, P O Box 7770, Tel: 251113492507/251911252713, Fax: 251114392259, Email: berhahanunegus@gmail.com, llptilab@gmail.com
3. Mr. Gizaw Molla, Manager, Planning and MIS Department Ethio Leather Industry, PVT.(ELICO), P. O Box 9281, Addis Ababa, Ethiopia. Tel: 0911-636302, Fax: 251 1 4 432365, Email: gizawmolla@gmail.com
4. Mr. Lucio Chifamba, Economist, Industry and Commerce, Box 7708 Causeway, Harare, Tel: 263 793461, Email: lucychif@gmail.com
5. Mr. Frank Dixon Mugenyi, Senior Industry Adviser, AUC, Addis Ababa, Tel: 251923430487, Email: mugenyif@africa-union.org

KENYA

6. Charles Mwangi Ndungu, Research Standards and Policy AG. Director, Kenya Leather Development Council. P O Box 14480-0800 Nairobi, Tel: 254 0733995697, Email: Ddungucharles@hotmail.com
7. Simon Joshua Nganga, Manager, SIMJON Shoes, Kenya Footwear Manufacturers Association, P O Box 7637.00300 Nairobi, Kenya, Tel: 0722506885, sjnganga@hotmail.com

MALAWI

8. Clement Phangaphanga, Deputy Director of Industry, Ministry of Industry and Trade, Box 30366, Lilongwe, Tel: 265 999475453, 01770680, Email: clementphengaphanga@yahoo.co.uk
9. Crispin Amasi, Entrepreneur/interim Chairman, Masilent/LLEPDEC, P O 1593 Blantyre, Box 1593 Blantyre, Tel: 265 111914524/265999200389, Email: masilent94@yahoo.com/llepdec@hotmail.com

SUDAN

10. Hashim Fatahalla Khalid, Secretary General-COMESA Desk, Ministry of Trade – Sudan, [Tel:249912221206](tel:249912221206), hashim2001@hotmail.com

11. Mohamed Suliman Hussein, Business Man (Tannery) Managing Director, LLPI – Core Team Member, Flat no. 4 Bee Development Building –sulitan@yahoo.com, Tel: 249 912305428, Email: sulitan@yahoo.com

SWAZILAND

12. Philippa Thorne, Creative Founding Director, Khokho/Gone Rural, P O Box 446 Malkerns, Swaziland, Tel: 268 76021187, Fax: 268 25504932, Email: phil@gonerural.co.sz
13. Khethiwe N.C. Mhlanga, Director, Commerce Industry and Trade, P O Box 451 Mbabane H100, [Tel:268 24043201/2](tel:268240432012), Fax: 268 24044711 /24043055, Email: kncmhlanga@gmail.com

UGANDA

14. Ms. Victoria Senkubuge Byoma, Chairperson, Flewea CEO Gift and Curios Limited, P O Box 21077 Kampala, [Tel:256 772502363](tel:256772502363), Email: victoriasbyoma@gmail.com
15. Odong Francis Gimoro, Principal Engineer, Ministry of Trade, Industry and Cooperatives, P O Box 7103, Kampala, Tel: 256 414314000, Email: fgodong@yahoo.com
16. Semakula Robert, Managing Director, Bobbie Leather Limited, P O Box 11109, Kampala, [Tel:256 772 364004](tel:256772364004), Email: Roberts@bobbieleather.com, info@bobbieleather.com
17. Diana Nandagire Ntamu, Director, Entrepreneurship Centre, Makerere University Business School, P O Box 1337, Kampala, [Tel:256772370007](tel:256772370007), Email: dntamu@mubs.ac-ug, dianantamu@gmail.com

ZAMBIA

18. David Elias Daka, Livestock Consultant/Core Team , LIAZ, P O Box 32025, Lusaka, Tel: +260 966439227, Email: daviddukakis@gmail.com
19. Prof. Sitwala Mundia, Vice Chancellor, Copperstone University, P O Box 22041, Kitwe, [Tel:+260966945926](tel:+260966945926), Email: sitwalamundia@yahoo.com

INDIA

20. Prof. Dr. Asit Baran Mandal, Director, CSIR-CLRI, Ministry of Science and Technology, Adyar, Chennai, Tel: 9144 24910846/0897, Fax: 9144 24912150/1589, Email: directorclri@gmail.com
21. Dr. B. Chandrasekaran, Chief Scientist, CSIR-Central Leather Research Institute, CLRI, Adyar, Chennai -600020, India, Tel: 9144 24451188, Fax: 914424912150, Email: bchandru@gmail.com
22. Madhan Balaraman, Senior Scientist, Central Leather Research Institute, Adyar, Chennai – 600020, India, Tel: 919840724875, Email :madhan@clri.res.in, bmadhanscience@gmail.com

SWITZERLAND

23. Robert Elliot Skidmore, Chief, Sector Competitiveness, ITC, Palais Des Nations, Geneva, 1211-10 Switzerland, [Tel:41227300222/41793676073](tel:4122730022241793676073), Fax:41227334439, Email: skidmored@intracen.org

TURKEY

24. Assoc. Prof. Mehmet Mete Mutlu, EGE University Department of Leather Engineering, Bornova-Izmir-Turkey, Tel: 30 5358277522, Email: mete.mutlu@ege.edu.tr

SOUTH AFRICA

25. Fatuma Abdullah, Manager: Technical Assistance Programmes, AMSCO, 4 Fricker Road, Illovo, +27 2195000, Email: fatuma.abdullah@amscobv.com

ZIMBABWE

26. Mrs. B. Mutetwa, Acting Permanent Secretary, Ministry of Industry and Commerce, CY7708, Causeway, Harare, [Tel:263 4 791820-9](tel:26347918209), Fax:263 4 731821, Email: bmutetwa1@yahoo.com
27. Mr. Shoko Clement, Director, Tricastol Enterprises, 36 Canada drive, Breaside, Harare, [Tel:263 772470 484](tel:263772470484), Email: shokoclement@gmail.com
28. Stabile Mlilo, Administrator, Leather Institute of Zimbabwe, 20 Coventry Street, Belmont, Bulawayo, Tel: 263 772899003, mlilostar@yahoo.co.uk
29. Mpandaguta Edward, Principal, Mupfure Selfhelp College, Education, Science and Technology .P O Box 347 Checiutu.[Tel:0712872432](tel:0712872432), Email: mpandagutue@gmail.com
30. Clive Chirovia, Director, Samuneti Leathers, 1 Harrow Road, Doon Estate, Msasa, [Tel:263 772 304431](tel:263772304431), Email: samunetileathers@yahoo.com
31. Maxwell Mudzukwa, Senior Economist, Ministry of Industry and Commerce, P.Bag 7708 Causeway, [Tel:263 712528705](tel:263712528705), Email: mmudzukwa@yahoo.com
32. Kachepa Ayan, Economist, Ministry of Industry and Commerce, P Bag CY 7708 Causeway, [Tel:791820-9/0772866316](tel:79182090772866316), Fax: 04 735315, Email: ayankachepa@gmail.com
33. Nhamo E. Zengeni, Deputy Director, Ministry of Industry and Commerce, P. Bag 7708, Causeway, Tel: 04793408, Email: newzengeni@miit.gov.com
34. Billiat Chaderora, Acting Deputy Director, Ministry of Small and Medium Enterprises, Private Bag 077764 Causeway, Harare, [Tel:263773654186](tel:263773654186), bchaderopa@smecd.gov.zw
35. Mr. S. Chiname, Principal Economist, Ministry of Industry and Commerce, CY7708, Causeway, Harare, Zimbabwe, [Tel:263 4 791820-9](tel:26347918209), Fax:2634731821, Email: stephenchiname@gmail.com
36. Kasuso Anyway, Economist, Ministry of Industry and Commerce, P Bag 7708 Causeway, Harare, Tel: 263 737120070, Email: poloabasuso@gmail.com
37. Almar Chikonyora, Business Development Officer, SMECD, P.Bag 7764 Causeway Harare, [Tel:04793795](tel:04793795), Email: almahladrai@gmail.com

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38. Chaoneka Reginald, Principal Economist, Ministry of Industry and Commerce, P. Bag CY7708, Causeway, Harare, [Tel:0773229054](tel:0773229054), Email: rchaoneka@gmail.com
39. Bgwire Anthony, Senior Economist, Ministry of Industry and Commerce, Mkwati Building 12th Floor. Tel: 0777978331, Email: abgwirire@gmail.com
40. Sam Miller, Managing Director, Superior Holding, P O Box 2658 Harare, Barking Road, [Tel:263 4 621240/5](tel:26346212405) or [0772276457](tel:0772276457), Email: sammi@superior.co.zw
41. Thomas Paul Mupingo, Leather Technician, Golden Hands, 3253 Mutiro Crescent Ruwa, [Tel:0773101842](tel:0773101842), Email: goldehands@gmail.com
42. Fanuel Muzarazi, Senior Economist, Ministry of Industry and Commerce, CY 7708, Causeway, Harare, [Tel:263 0772965837](tel:2630772965837), Fax:2634 731621, Macherenje, Master of Ceremonies, [Tel:263772962052](tel:263772962052), Email: pmacherenje@yahoo.com
43. Grace Munhuwambo, Administrator, Ministry of Industry and Commerce, Box 7708 CY, Harare, [Tel:263 793461](tel:263793461), Email: gjewamambo@yahoo.co.uk

COMESA/LLPI

44. Dr. Mwinyikione Mwinyihija, Executive Director, Leather and Leather Products, Website: <http://www.comesa-llpi.org>, Box 2358 Code 1110, Addis Ababa, Tel: +251 11 4396279/251 930077660, Fax: +251 11 4390900, Email: mmwinyi@hotmail.co.uk.
45. Prof. Mekonnen Hailemariam Alemu, Leather Value Chain Expert, , Leather and Leather Products Institute, Website: <http://www.comesa-llpi.org>, Box 2358 Code 1110, Addis Ababa, Tel: +251 11 4396279,+251 911 662669, Fax: +251 11 4390900, Email: mekonnen57@gmail.com
46. Mr. Nicholas Mudungwe, Cluster Development Expert, Leather and Leather Products, Website: <http://www.comesa-llpi.org>, Box 2358 Code 1110, Addis Ababa, Tel: +251 11 4396279/+251 11 4390327, Fax: +251 11 4390900, Email: nikmudungwe@gmail.com.

COMESA Secretariat,

47. Ms. Harriet Nambule Malindi, Administrative Assistant, Tel: +260 965 846329, Email: hnambule@comesa.int, COMESA Centre, Ben Bella Road, P O Box 30051, Lusaka, Zambia, Tel: +260 211 229725, Email: secgen@comesa.int
48. Mercy Mwanza, Finance Officer, email: mmwanza@comesa.int, COMESA Centre, Ben Bella Road, P O Box 30051, Lusaka, Zambia, Tel: +260 211 229725, Email: secgen@comesa.int