

CORPORATE CAPABILITIES AND QUALIFICATIONS

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ABOUT JAA

J.E. Austin Associates, Inc. (JAA) was founded in 1986 for the purpose of assisting businesses, governments, non-profit organizations, educational and financial institutions, and other development organizations around the world to improve productivity, to enhance competitiveness, to strengthen management and strategy implementation, and to facilitate economic development.

JAA's practice areas have centered primarily on strategy and management consulting for the development of emerging and developing economies. The focus of this work is on increasing business competitiveness and growth; increasing and improving public-private dialogue processes; developing mechanisms in the public and private sectors to increase their competitive advantage; boosting trade and investment opportunities; fostering institutional and organizational improvement; intensifying performance of small and micro-sized enterprise; and expanding social development capabilities of the entire economy.

JAA stresses the "downloading" of tools, methodologies and approaches to local partners and ensures that they have the best information, lessons and skills available to identify and implement initiatives most likely to achieve sustainable results. This is because JAA believes that economic growth; competitiveness; and other development challenges can be addressed in highly leveraged ways by involving and empowering local stakeholders to the maximum extent possible.

Since 1986, JAA has completed more than 400 projects in 100 countries. In any given year, JAA professional staff work on projects in more than 30 countries worldwide. JAA's main project experience areas include assignment related to:

- Agribusiness and other sectors and industries,
- Competitiveness initiatives,
- Corporate strategy,
- Institutional and organizational change,
- Management education and work force development,
- Private sector development, and
- Trade and investment.

JAA's clients include many private companies; national, provincial, and state governments; nongovernmental organizations; and international finance and assistance agencies. JAA has carried out assignments funded by the following donor/lender agencies:

- African Development Bank,
- Asian Development Bank,
- Canadian International Development Agency (CIDA),
- Department for International Development (DFID),
- European Commission,
- Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ),
- Inter-American Development Bank (IDB),
- Organization for Economic Cooperation and Development (OECD),
- U.K. Department for International Development (DFID),
- United Nations (UNDP, UNIDO, UNHCR, UNICEF),

- U.S. Agency for International Development (USAID), and
- World Bank Group, including the Foreign Investment Advisory Service (FIAS), International Finance Corporation (IFC) and the Multilateral Investment Guarantee Agency (MIGA).

JAA has worked in the following countries:

AMERICAS	AFRICA	ASIA/OCEANIA	EUROPE
Argentina	Botswana	Armenia*	Albania
Bolivia	Cameroon	Azerbaijan	Austria
Brazil	Congo (DRC)	Bangladesh	Belarus*
Canada	Congo (RC)	Brunei	Bosnia*
Colombia	Egypt	Cambodia	Bulgaria
Costa Rica	Ethiopia	China	Croatia
Dominican Republic	Gabon	Fiji	Cyprus
Ecuador	Ghana	Georgia*	Czech Republic
Guatemala	Guinea	India	France
Haiti	Ivory Coast	Indonesia	Hungary*
Honduras	Kenya	Israel	Ireland
Jamaica	Lesotho	Kazakhstan	Macedonia
Mexico	Madagascar	Kyrgyz Republic	Moldova*
Nicaragua	Malawi	Mongolia	Poland
Paraguay	Mali	Pakistan	Portugal
Peru	Mauritius	Philippines	Romania
Trinidad & Tobago	Morocco	Sri Lanka	Russia
United States	Mozambique	Thailand	Slovakia
Uruguay	Namibia	Tajikistan*	Turkey
Venezuela	Niger	Turkmenistan*	Ukraine
	Nigeria	Uzbekistan	
	Rwanda	Vietnam	
	SADC Region		
	Senegal		
	South Africa		
	Swaziland		
	Tanzania		
	Togo		
	Tunisia		
	Uganda		
	Zambia		
	Zimbabwe		

**Participation only in courses developed by JAA*

JAA MISSION AND VISION

J.E. Austin Associates, Inc. (JAA) assists business and government leaders to implement strategic changes designed to achieve rapid growth that is economically, politically, socially and environmentally sustainable. JAA is a proven leader in adapting the most advanced business tools, management methodologies and analytical techniques to the realities of business and policy environments in less developed countries and transitional economies. JAA's areas of expertise are in competitiveness; strategic planning; private sector development; export growth; agribusiness; investment promotion; financial analysis; institutional strengthening and other areas related to encouraging business-led economic growth.

JAA pioneered the application of competitiveness analysis to developing countries and emerging markets, and the use of cluster-based approaches to achieve striking results. Country-level competitiveness analyses focus on the identification and development of key industry and sub-industry clusters that offer significant opportunities for private investment and for achieving a sustainable competitive advantage. We believe that those seeking to improve the economic growth prospects and competitiveness of emerging economies should seek results, not theory.

CORPORATE CAPABILITIES

J.E. Austin Associates, Inc. (JAA) strengths are centered on assisting businesses within developing, emerging and transition economies to grow sustainably and to improve their strategic and operational performance.

Through private sector growth activities worldwide, JAA has acquired a deep and broad understanding of the policies and institutions that underlie efficient market-focused systems. Such understanding informs our development of coherent and balanced approaches that address the economic, governance, and institutional issues that arise in implementing economic and political reforms. To accomplish project goals, JAA uses tools such as:

- **Private sector input to legal and institutional reform**—Mobilize private sector stakeholders to analyze constraints on growth and profitability and inform the public sector of these constraints.
- **Dialogue mechanisms**—Country benchmarking, private sector "Maps," dialogue sessions, private sector surveys, focus groups, and high-level policy forums based on the OECD model.
- **Comparative policy analysis**—Database tracking and ranking of all countries on 40 key indicators to aid dialogue.
- **Austin Policy Impact Framework**—Identify macroeconomic influences on the private sector and illustrate the practical effects of government policy on private enterprise finance, marketing, management, production, distribution, operations, and organization.
- **Focused surveys and focus group analysis**—Gather statistics on the private sector and data on entrepreneurs' perceptions of institutional and policy bottlenecks, training needs, and business opportunities.
- **Cluster-based services** – Mobilization and facilitation of industry and geographic cluster-based decision-making and implementation as a means to overcoming constraints, achieving strategic objectives, informing public-private dialogue, encouraging investment, and creating awareness of market requirements and opportunities.

These tools are being applied in national and regional competitiveness initiatives, private sector development projects, institutional restructuring programs and others. One of the goals of these initiatives is to facilitate public–private sector dialogue on national competitiveness, vastly increasing the likelihood that policy, institutional, legal, and regulatory reforms will be designed and implemented to strengthen the economic environment for private sector enterprises.

JAA has developed leading capacities in inter-related areas such as:

- Competitiveness and Industry/Sector Specific Projects
- Agribusiness and Agriculture
- Trade and Investment
- Finance
- Private Enterprise and Private Sector Development
- Training and Workforce Development
- Microenterprise Development
- Infrastructure and Infrastructure-related Services
- Institutional/Organizational Improvement and Public-Private dialogue

Through our work in these various areas, JAA has developed a capacity to work with a broad range of clusters, industries and sectors within varying contexts. Listed below is a table illustrating some of the clusters, industries, and sectors with which JAA has worked since 1986:

- Agribusiness and Agroprocessing
- Apparel/Textiles
- Aquaculture Farming
- Banking and Financial Services
- Beverages (Rum, fruit juices wine, etc.)
- Business Development Services
- Canning
- Cashew
- Ceramics
- Cocoa
- Coffee
- Coir (Coconut)
- Construction
- Cotton
- Cut Flowers
- Dairy
- Education
- Electronic Components
- Fish/Seafood
- Fisheries and fish processing
- Forest Products
- Gems and Jewelry
- Grains
- Handicrafts
- Health Services
- High Value Fruit and Vegetables
- Information and Communication Technologies (ICT)
- Leather Products
- Livestock and Meat Production
- Maritime Shipping
- Microfinance
- Oilseeds
- Packaging Products
- Paper and Paperboard
- Poultry
- Pyrethrum
- Rubber
- Rubber Products
- Silk
- Spices (including many specific species)
- Tea
- Tobacco/Cigars
- Tourism
- Toys
- Transport Services
- Wood Products

JAA's professional services can be accessed through a variety of mechanisms including our subcontracts on the following Indefinite Quantity Contracts (IQC):

IQC Name	Prime Contractor
Accelerated Microenterprise Advancement Program (AMAP)—Enabling Environment (EE)	Management Systems International (MSI)
Accelerated Microenterprise Advancement Program (AMAP)—Business Development Services (BDS)	Development Alternatives, Inc. (DAI)
Accelerated Microenterprise Advancement Program (AMAP)—Microfinance	Development Alternatives, Inc. (DAI)
Financial Services	Chemonics International, Inc.
General Business, Trade and Investment (GBTI)	Nathan Associates, Inc.
Economic Policy	Nathan Associates, Inc.
Rural and Agricultural Incomes with a Sustainable Environment (RAISE)	Chemonics International, Inc.

The following is a more complete listing of JAA's experience in the various practice areas of Competitiveness and Industry/Sector Specific Projects; Agribusiness and Agriculture; Trade and Investment; Finance; Private Enterprise and Private Sector Development; Training and Workforce Development; Microenterprise Development; Infrastructure and Infrastructure-related Services; and Institutional/Organizational Improvement and Public-Private dialogue.

Competitiveness and Industry/Sector Specific Projects

J.E. Austin Associates, Inc. (JAA) is a leader in the field of competitiveness and cluster-based approaches to building competitiveness, and has worked in partnership with private enterprise, USAID, the World Bank, DFID and others to develop and implement flagship competitiveness programs worldwide. Competitiveness can be defined as sustained growth in productivity, and is most effectively measured by growth in value addition. Competitiveness is driven and affected by many factors that can be grouped under three major headings: macroeconomic conditions, microeconomic conditions, and the quality and execution of business strategy (Porter, 1990). As such, comprehensive competitiveness programs address two complementary and interrelated issues: the quality of business strategy and the business environment that facilitates strategy selection and implementation, and investment.

Macroeconomic conditions include fiscal, monetary, trade, and other broad and overarching policies that are a necessary but not sufficient cause for growth. *Microeconomic conditions* refer to elements such as tax codes, infrastructure, utilities, regulation, education, public administration, and many other factors influenced by both the private and public sectors that affect the day-to-day ability of businesses to compete. The *quality of business strategy* refers to the choices business leaders make about where and how to compete, which industries to be in, and how to position their companies. It also refers to their effectiveness in implementing their plans, their efficiency in managing their operations and their ability to achieve value added.

The Competitiveness Approach developed by JAA is comprehensive and aims to improve both the quality of business strategy and the environment within which firms compete. JAA's programs are designed to improve all three of the key competitiveness components by working primarily with industry clusters or market segments, but also with business associations, government institutions, and public-private partnerships, as well as other influential institutions such as think tanks, management schools, press groups, reform commissions, and other stakeholders. To date, JAA has worked with more than 50 industry/business clusters including, amongst others, wood products, gems/jewelry, tea, coffee, coir, ceramics, rubber, tourism, information technology (IT), silk, spices, fish, apparel, horticulture, cut flowers, meat products and cashmere.

The JAA methodology helps business to identify its strategic opportunities; to identify the gaps between current strategies and desirable strategies; to develop strategic plans to achieve new opportunities; and to implement those plans. Simply put, the programs are designed to help firms and industries increase their ability to target and serve desirable customers and markets, add value to their products, increase their productivity and better meet the needs of existing and potential customers. Operating predominantly at the cluster, market sector or association levels, JAA's approaches enable businesses in an industry or industry group to find and collaborate on their points of common interest, and to develop productive linkages within the industry while maintaining competition. It enables the industry to expand linkages with related industries and institutions and to create clusters that collaborate to achieve strategic objectives. Programs are designed to enable businesses to continually use innovative ideas and approaches in the development of their individual strategies and achievements.

A key element of the JAA Competitiveness Approach is the development of industry and cluster competitiveness. From its inception, JAA has worked with business and industry to develop and implement effective strategies for growth and restructuring. JAA is committed to helping countries achieve sustainable economic growth in ways that allow broad-based participation of citizens in the benefits of that growth. JAA's approaches to business strategy are appropriate to

interventions at many levels within sectors and within supply, value and market chains, and designed to function at many levels. JAA is also an industry leader in implementing cluster-based approaches to improved strategy.

A “cluster” is the collection of businesses and other organizations that must collaborate to enable a core industry to successfully produce and deliver a product or service. Business strategies at the cluster level are often multi-faceted, systematic plans of action designed to increase the overall viability of the cluster, and thereby the strength of the developing country’s economy. JAA’s approach to corporate/industry/cluster strategy focuses on the needs of the customer and market. JAA serves as a catalyst and facilitator in the process, as well as a source of information and expertise. In addition to improving industry, cluster and sector strategies, JAA assists top management of private enterprises in strategic planning, studying markets, conducting feasibility and competitiveness studies, identifying joint venture partners, analyzing financial scenarios and restructuring their organizations.

The JAA approach also helps the private sector to define and articulate its needs, and where these require government action, to effectively make well-considered and well-presented cases for change. The approach assists and encourages government and the public sector to revise policies, programs, systems and procedures so that they do not impede, but rather facilitate, business competitiveness. The approach helps business to focus on priority strategies and needs that will enable it to become globally competitive. JAA’s experience is that prioritization of business objectives and policy change on the basis of needs identified by industry clusters and business groups, and clearly advocated on the basis of facts and well-considered arguments, leads to positive policy change and a virtuous circle of increasing trust and common vision between public, private and civil stakeholders.

The JAA methodology also includes successful approaches to changing the mindsets of all levels of a country’s civil society with respect to the principles that are important for competitiveness and sustained economic growth. These involve changing the focus of public dialogue and media coverage of economic development so that the issues of competitiveness and economic development are correctly and effectively presented. Actions include training of media partners on the correct terminology and usage of language related to competitiveness and economic development; informing the public through media campaigns on the successes of the project in developing economic prosperity; providing clear and unbiased data and information; providing case histories and best practices; and influencing the dialogue process among all levels of business and government. By implementing this approach through various forums and media vehicles, it informs the public on the concepts of competitiveness, and the correct and effective use of the concepts, language and principles to affect the greatest acceptance and success of the methodology of competitiveness in economic development.

Listed below are examples of ongoing and completed projects:

Sri Lanka Competitiveness Exercise/Initiative USAID

JAA was contracted to carry out a competitiveness exercise in Sri Lanka. Through this assignment, JAA conducted 26 workshops on competitiveness, cluster development and competitive strategies for business and government leaders. JAA worked with leading business associations to focus on techniques of effective dialogue and emphasized the need to work with one voice, ensure bi-partisan support and to prioritize its advocacy efforts. In October of 1998, for the first time in Sri Lankan history, all 5 leading business associations came together and issued a set of 10 key priorities, calling on the Government to work in bi-partisan ways to

address these. Since that time, priorities have been expressed annually with greater levels of analytical sophistication, and have led to direct sessions with the head of state and business leaders. The Ceylon Chamber also established its Economics Intelligence Unit. The Minister of Industrial Development, the Minister of Trade and the Board of Investment requested competitiveness-training sessions for approximately 20 top staff in each of these three ministries. The Minister of Industrial Development adjusted his productivity campaign to include a focus on competitiveness. The Minister of Trade, who was trying to generate support in South Asia for a regional trade agreement, sponsored a regional competitiveness conference.

On the basis of the results from the competitiveness exercise, USAID issued a Request for Proposal (RFP), and JAA (through the Nathan-MSI GBTI consortium) was awarded the contract to implement a longer-term Competitiveness Initiative. JAA facilitated the development and implementation of competitive strategies in 5 industry clusters: rubber, tourism, gems and jewelry, tea and ICT. Given the success of this initial group, the program was expanded to include 3 additional clusters: ceramics, coir and spices.

JAA is also assisting the Government of Sri Lanka in the establishment of National Competitiveness Council. JAA has worked with partner organizations in Sri Lanka on the inclusion of Sri Lanka in the Global Competitiveness Report, published by the World Economic Forum in association with the Harvard Institute for International Development.

Each of the 8 clusters is implementing 3 or more action initiatives, are jointly invested, are achieving notable improvements in bottom-line results, value added and market position. For example, prior to the project's work with the Rubber cluster, Sri Lanka held approximately 20 percent of the world market for specialty all-rubber, non-pneumatic tires. Today Sri Lanka has over 30 percent of the world market for all-rubber, non-pneumatic tires. The tourism cluster has come together to develop and implement an ecolodge to attract high-end adventure and ecotourism patrons. Individual companies have also benefited enormously from the strategic planning and cluster work, adopting strategies and operational improvements for their individual enterprises.

Sri Lanka Competitiveness Initiative—Workforce Development: Design and Development of an Internship Program

USAID

Many clusters working with the Sri Lanka Competitiveness Initiative have identified workforce development as a crucial issue that needs attention. As the first step towards a concerted approach to developing the workforce, it is proposed that a private sector led Competitiveness Internship Program be developed for selected industries, in partnership with the public sector. Under the Sri Lanka Competitiveness Initiative project, JAA is assisting in design and development of an internship program. JAA is reviewing previous workforce development and skills development reports/studies done in Sri Lanka thus far; and is conducting discussion sessions with public and private sector leaders to obtain a better understanding of workforce development issues with emphasis on on-going internship programs. JAA is also identifying barriers and recommendations for ways to overcome them; and identifying mechanisms to increase employability through structured and well-managed internship programs both from employers and individuals through the development of a market-based, demand-led system. This will result in JAA designing an internship program that better meets the needs of industry and skills of the workforce.

Croatian Competitiveness Initiative

USAID

JAA is leading a long-term Competitiveness Initiative in Croatia, which began in April 2001. An earlier introductory exercise in Southeast Europe pinpointed the lack of institutionalized private-public dialogue mechanisms as a constraint. It also developed a Leadership Map of Croatian

private and public leaders and generated commitment to forming a Croatian Competitiveness Council. After the inception of the Competitiveness Initiative project, JAA served as the catalyst for the formation of the Croatian Competitiveness Council (CCC), composed of 15 leading Croatian CEOs, including two leaders from HUP—Croatia’s leading voluntary business association that also represents SMEs. The Council has met monthly since May 2001, defined 6 key constraints to economic growth, and is developing action plans for the implementation of initiatives to address them. This is the first business roundtable of its kind in Croatia. Shortly after its formation, the Deputy Prime Minister signed a formal Memo of Understanding on behalf of the Government of Croatia recognizing the Council and agreeing to engage in a dialogue with it.

JAA also served as a catalyst to engage the heads of Croatia’s 4 leading labor unions and 5 leading universities. This, along with its work with government leaders, culminated in the formation of the National Competitiveness Council representing business, government, labor, and educators. The purpose of this council is to identify leading constraints to sustainable economic growth, to help the Government set priorities, and to monitor implementation. The project is working with several secondary cities on forming regional competitiveness councils to undertake regional initiatives.

JAA has also provided strategic and technical assistance to 3 industry clusters (IT, wood products and tourism). The wood cluster brings together representatives from all parts of the value chain - from forest to final production and retail including the monopoly supplier, Croatia Forests. It also includes representatives from the Ministries of Economy and Agriculture and Forestry, as well as academic institutions. The Wood Cluster, working at the national level as well as with producers in and around the city of Varazdin, drafted its own strategy that was completed in March 2003. Other regions have also taken an interest in the activities and are endeavoring to develop their own clusters along a similar model.

Cambodia, Indonesia, Philippines, Thailand, and Vietnam/ANE Bureau National Competitiveness Building Project; and Southeast Asia Competitiveness Initiative (SEACI)—Thailand, Vietnam and Cambodia USAID

The broad objective of the preliminary competitiveness process in Southeast Asia was to assist in developing and implementing national strategies and design procedures to assist Indonesia, the Philippines, Thailand, Cambodia and Vietnam to effect change by enabling making their private sectors to become more competitive in the global marketplace. The specific objectives were to influence policy and institutional reform, improve business and industry strategy, identify decision-makers among the private-public sector leadership, and develop networks of stakeholders that support various aspects of competitiveness initiatives and reforms. Working extensively with business associations, the project focused on several pilot industry clusters in each country. The program in Thailand included a special focus on the regions around Bangkok and Chiang Mai; similarly, the Filipino program focused on the regions around Davao, Mindanao, Cebu, and parts of Luzon. In Vietnam the objective was to develop and implement national strategies and change processes to help the private sectors become more competitive through support of the U.S.-Vietnam bilateral trade agreement and to strengthen U.S.-Vietnam trade linkages.

Based on the success of an initial Southeast Asia regional exercise, USAID funded a multi-year project in Thailand, Vietnam and Cambodia. The objective of this project is to contribute to the speedy recovery of South East Asian economies, building the capacity of local USAID contractors, counterparts and stakeholders to serve as catalysts of economic growth in the region.

The Thailand activity is currently working with the multimedia, handicrafts, high-value agricultural products, gems, silk, seafood and tourism/ecotourism clusters. In Cambodia, JAA is

collaborating with Enterprise Development Cambodia (EDC) on a regional business planning process centered on contributions from the fish, rice milling, rice noodle manufacture, brick and tile manufacture and other industry associations, and also on the development of a fish processing and export program based on Tonle Sap.

The Vietnam portion of the activity came to a close in December 2003. The Vietnam component of the SEACI Project worked with fruit and ceramics clusters in and around Hanoi and ICT clusters in Hanoi and Ho Chi Minh City. Significant progress was made in coalescing of clusters and stakeholders; developing articulated cluster strategy action plans; and jump-starting the implementation of a number of the strategy action plan initiatives.

Uganda Competitiveness Exercise

USAID

The USAID Africa Bureau funded this initial short-term study and exercise in Uganda, selecting that country because of its commitment to economic reform and private sector development and because of the interest expressed by USAID/Kampala.

In a pilot program for Africa, JAA applied methods of Competitiveness Analysis to industry clusters in Uganda and also engaged leaders of the Government of Uganda. Particular focus was on 4 Uganda industry clusters: cut flowers, fisheries, coffee and tourism. The analysis also included a comprehensive assessment of the extent to which Uganda has a favorable national platform (i.e., policy environment, infrastructure, human resources) for attracting foreign capital and enabling the competitiveness of Ugandan enterprise and industry. The team also examined the existing private-public dialogue mechanisms and recommended ways to strengthen these.

The initiative lasted about 6 months and involved intensive work with industry clusters and the identification of case studies of competitive enterprises that could serve as models to others. The head of the leading business association and the Finance Minister requested immediate follow-on assistance. Towards the end of the study, President Museveni requested a personal briefing at his country home two hours outside of Kampala. Present were 20 top government and private sector leaders. The JAA Team Leader engaged the President in lively conversation regarding the study findings and recommendations. Subsequent to this project, the Government implemented a Medium-term Competitiveness Strategy (MTCS) to guide public sector improvements in support of economic competitiveness.

Romania, Croatia, Macedonia, and Albania; National Competitiveness Building

USAID

The purpose of this project was to introduce competitiveness themes and approaches in Albania, Croatia, Macedonia and Romania through presentations and media coverage, to provide impartial data and information on national competitiveness through national competitiveness assessments, and to consider the competitiveness of several specific industries in each country in greater detail. JAA recommended industry-level actions to improve the competitiveness of the Romanian, Croatian, Macedonian, and Albanian business, and ways to improve the private-public sector dialogue in support of industry clusters that are willing to increase their competitiveness.

JAA also participated in the Southeast Europe Trade Initiative (SEETI) conference, making competitiveness an issue for the SEETI trade integration initiative. JAA provided a plenary address on competitiveness and discussed competitiveness approaches used in Southeast Europe.

As a result of the themes presented in this project, USAID/Croatia and the Croatian government requested that JAA implement a year-long program to help form competitiveness councils and work with industry clusters. USAID/Macedonia is also planning a major competitiveness project.

Honduras, Competitiveness Strategy for the Honduran Textile and Apparel Cluster **Private client**

JAA conducted a competitiveness analysis of the Honduran apparel export industry, which was particularly important in the context of the expiration of the MFA agreement. JAA drew upon centers of excellence in the United States to help improve the competitiveness of the Honduran textile cluster, creating better firm-level strategies, improving market intelligence capabilities, raising export and employment levels, and instituting contingency plans for alternative scenarios after quotas end. Once global competitiveness is achieved, the benefits to Honduras will include higher GDP growth rates and employment, better jobs, improved export revenues, industrialization, expansion of benefits beyond San Pedro Sula, and a modern and diverse economy.

Russia, Ukraine, Kyrgyz Republic—Europe and Eurasia Bureau National Competitiveness Building **USAID**

JAA developed and implemented a national strategy and change process to help the governments and private sectors of Russia, Ukraine, and Kyrgyz Republic to become more competitive in the global marketplace. Specific objectives include: influencing policy and institutional reform; improving business and industry strategy; reaching the highest levels of private and public sector leadership; and developing a regional stakeholder network to support competitiveness initiatives and reforms. JAA collaborated with the Competitiveness Project Leadership Board (CPLB) to identify private and public sector leaders and invite them to business strategy seminars and coordinated with CIPE on a Competitiveness Conference to be held in Budapest, Hungary in March 2002.

Mongolia Country Competitiveness Exercise and Mongolia Competitiveness Initiative **USAID**

In carrying out a comprehensive competitiveness evaluation of Mongolian business and the economy, JAA made more than 25 presentations on business and economic competitiveness and strategy to more than 600 stakeholders in business and government. Subsequent to these presentations, JAA completed competitiveness benchmarking indicators in exports, investment, infrastructure, science and technology, and human resource and workforce development; identified potential industry clusters and held discussions with several clusters; and trained a cadre of Mongolian presenters on “windows of opportunity” for future presentations. Through an organized public relations and media campaign, JAA increased Mongolians’ understanding of competitiveness and its significance and has encouraged public discussion and dialogue on competitiveness.

The work in Mongolia was extended in August 2000 to enable JAA to provide a long-term program to implement a national competitiveness initiative. The Initiative emphasized the improvement of business strategy (initially focused on 3 industries: tourism, meat, cashmere) and the improvement of the environment for business.

The Mongolia Competitiveness Initiative has produced many substantive results. It has helped to establish public-private sector “task forces” in the tourism and meat industries to address very specific constraints. The Mongolia Competitiveness Initiative helped to turn around a 3-year decline in tourism arrivals and shifted the demographic of tour groups from low-end to high-end adventure tourists, which resulted in increases in arrivals, lengthier stays, and increased expenditures per visitor. In the cashmere sector, the project is working on a program to collaborate with U.S. design schools to produce professional marketing materials (logos, brochures, displays, multimedia products, etc.) for Mongolian industries to effectively promote the cashmere collective mark, Mongolia as a tourism destination, and meat products from

Mongolia. Herders have increased their incomes and Mongolia is obtaining higher values and providing high value added for its cashmere. The meat industry has located new markets, introduced higher value-added products and markedly improved its quality and sanitary standards.

Bulgaria Competitiveness Exercise/Program (Bulgaria Policy Reform and Advocacy Strengthening Project)

USAID

JAA implemented a particularly intensive competitiveness program as part of the Policy Reform and Advocacy Strengthening project. JAA helped to build stakeholder coalitions to promote competitiveness for Bulgaria, with particular emphasis on business strategy and improvement of the microeconomic environment for business. The program included competitiveness presentations to over 1000 leaders from businesses, government, and other stakeholders and follow-up with strategic work among 7 industry clusters (IT, apparel, wine, maritime transport, tourism, agribusiness and canning). The team formed cluster working groups, led by Bulgarians who had been trained by JAA to convene and facilitate the industry discussions. This process was supported by a number of competitiveness case studies of industries and companies, prepared by Bulgarian counterparts under JAA supervision. For the clusters that were the most committed to the competitiveness process, JAA assisted the competitiveness thinking by mobilizing industry experts to help the industry stakeholders examine their strategic issues.

The climax of the competitiveness exercise was a national competitiveness conference. In addition to top-level keynote speakers, the conference was particularly focused on the work of the industry cluster groups. Competitiveness action plans were discussed by the industries and presented at the conference. This exercise was notable in stressing the role of local stakeholders in implementing the competitiveness process. It also emphasized upon a decentralized approach to cluster work and public-private dialogue.

Competitiveness is now widely accepted as a guiding theme for business and government in Bulgaria. The industry groups are continuing their collaboration. JAA facilitated a weeklong visit to Ireland (with the assistance of USAID, World Learning and Management Systems International) by public sector and business leaders to examine some of the mechanisms for Ireland's success. While budget limitations restricted intensive, continuous assistance, JAA's team has now been remobilized to assist the ICT cluster to develop its industry strategy, and to improve business collaboration and the strategic focus of the national Economic Growth Council.

Guyana Competitiveness Initiative Feasibility Study and Design United Kingdom Department for International Development (DFID) and Canadian International Development Agency (CIDA)

For DFID and CIDA, JAA evaluated the potential for successful implementation of a competitiveness initiative for Guyana. The four-person team (which included a CIDA consultant) met with representatives of 12 industry groups (fisheries and fish processing, jewelry and gems, agro-processing, tourism, wood products, garment assembly, rice, IT, shipping, handicrafts, beverages (Rum), banking/finance). The group met with business support organizations and government agencies (Ministry of Trade, Tourism and Industry, Bank of Guyana, Guyana National Bureau of Standards (BoS), Guyana Office for Investment (GOInvest), New Guyana Marketing Corporation (New GMC), Private Sector Commission (PSC), Guyana Manufacturers Association (GMA), Trades Union Congress (TUC), CARICOM, Multilateral and Bilateral Organizations, GEO Project). In these meetings, JAA assessed the readiness of industry and government to participate in a national competitiveness initiative. The opportunities for such an initiative seemed to be very promising, and JAA prepared the project design for the National Competitiveness Initiative.

Dominican Republic Regional Competitiveness USAID

In the Dominican Republic, JAA carried out a series of workshops and facilitations that helped to define a regional competitiveness initiative. The Association for Development of Santiago (APEDI), together with other leading business associations of Santiago came together to develop the Competitiveness Strategy for Santiago and its region as an input to Santiago's Strategic Plan. JAA provided inputs for the larger project, led by Chemonics, which developed a National Competitiveness Strategy and presented this to all major political parties. JAA brought together leaders from 6 of Santiago's key industry clusters and applied competitiveness tools so as to develop practical, action-oriented strategies for the tobacco/cigar, apparel/leather, construction, tourism, health and education clusters. This effort has identified ten flagship interventions (cross-cluster) to increase the future prosperity of the region.

Egypt: Workforce Development Strategy USAID

In partnership with PriceWaterhouse Coopers and the Stanford Research Institute, JAA conducted a workforce development exercise in Egypt focusing on agribusiness, tourism, and information technology (IT). Based on the results of a workshop carried out in December 2002 and on USAID's identification of IT as cluster for focus, JAA facilitated a dialogue between private sector tourism executives and education and training providers to forge better links between the private sector and the training providers; and also provided assistance to the strengthening of IT and IT-related services workforce development programs.

Republic of South Africa: Development of Workforce Competitiveness USAID

JAA, as the technical lead in collaboration with Nathan Associates, Inc., developed strategic objectives related to workforce development, private sector development, and democracy and governance in the Republic of South Africa. Building on prior projects in South Africa on education and workforce development, the purpose of this study was two-fold. First, it reviewed international approaches to monitoring and evaluating training systems in a range of industrialized and developing countries with a view to deriving lessons for South Africa. Second, the study provided the South African Department of Labor (DoL) with recommendations about how to conduct impact studies of the National Skills Development Strategy (NSDS) in the medium and long terms. In particular, this aspect of the study focused on the implications of the DoL undertaking social cost-benefit analyses of the NSDS.

Uganda: Support for Private Enterprise Expansion and Development (SPEED)— Prefeasibility Assessment and Roadmap for a National Establishing Competitiveness Council USAID

Through the Uganda SPEED project, JAA assisted the Private Sector Foundation-Uganda (PSFU) and various stakeholders to jump-start a process that could lead to the creation of a National Competitiveness Council.

JAA consulted numerous organization leaders and individuals in the public and private sectors, and led roundtable discussions, to inform the stakeholders of the international experience with Competitiveness Councils, and to discuss the role that a similar structure could play in Uganda. JAA described the likely role and core functions of a Council in Uganda, suggested an operating framework and structure for a Council, provided technical notes on international experience, highlighted key issues that would need to be discussed and agreed, and proposed a roadmap for further considering and implementing a Council.

As part of this assignment, JAA also developed a blueprint for information sharing amongst sectoral business stakeholders, apex business representatives, public-sector decision-makers and the Medium Term Competitiveness Strategy (MTCS) as the basis for prioritizing and guiding actions to improve competitiveness and economic performance. Developed in conjunction with USAID, the World Bank, FIAS, MTCS and other stakeholders with which JAA was working, the blueprint provides a means to focus decisions and implementation regarding improvements to the enabling environment for business and investment.

Regional Center for Southern Africa (RCSA)—Technical Analysis for Proposed Global Competitiveness and Regional Market Integration Strategic Options **USAID**

As part of the process of developing the RCSA's Strategic Plan for FY 2004-2010, a team of consultants provided Results Framework Training and Technical Assistance to the RCSA. As a result of these sessions, several results framework working groups were formed to continue working on the results frameworks.

The objective of this assignment was to conduct a review, synthesis, and analysis of literature related to competitiveness and market integration issues in Southern Africa to inform the further development of the RCSA strategic plan. A Competitiveness and Agriculture/Food Security Results Framework Working Group was developed to continue work on the results frameworks for competitiveness/regional market integration and food security strategic areas.

JAA provided technical assistance for the Competitiveness and Agriculture/Food Security Results Framework Working Group. JAA framed research questions, reviewed prior RCSA documents and state-of-art literature on the subject, provided a synthesis and analysis of the literature, and a set of prioritized recommendations. JAA also led the food security component of the overall assignment.

Asia/Near East (ANE) Sustainable Agriculture and Food Security Conference in Manila **USAID**

Under the RAISE IQC, USAID engaged the Chemonics consortium to provide speakers and facilitation for a conference on Food Security in the Asia/Near East (ANE) region. The purpose of this conference was to update participants' knowledge and skills and to facilitate the exchange of information and lessons learned on sustainable agriculture and food security, with particular emphasis on issues related to the region.

JAA participated in the design and conceptualization of the 3-day conference. JAA was also invited to provide a highlighted presentation on the role that clusters can play in developing the competitiveness of the agricultural sector, and to participate on a panel session to discuss *Strengthening Market Linkages: The ANE Experience*. This panel session focused on presenting experiences on how agribusinesses can link input/raw materials from farmers to consumers or exporters and accelerate competitiveness by reducing transaction costs and increasing outputs. The session also discussed the effects that benefit farmer producers and processors, consumers, exporters, and importers as well as clusters and producer associations.

The JAA presentation, *Succeeding in Highly-competitive Global Economies - A Cluster-based Approach to Improving Competitiveness*, used the J.E. Austin Associates' framework of competitiveness approaches, with specific focus on work done with industry clusters to define and implement better strategies, to consider the question of how countries and their businesses can compete in globally competitive markets.

Agribusiness and Agriculture

Agribusiness is a key element of the economies of many developing countries, often accounting for a significant percent of jobs and a substantial percent of the value of goods and services produced in a country. Countries, and their citizens, often depend upon the broad scope and rich potential of agribusiness for economic growth and progress, encompassing as it does all enterprises involved in the production, processing or distribution of goods deriving from agriculture, forestry, and fisheries.

The agriculture and agribusiness sector faces challenges associated with global trade and competitiveness, imperatives to become more productive in terms of value per labor input, and requirements to enable underutilized workforce to be productive in enterprise.

A nation's agribusiness industry is usually comprised of many organizations and enterprises—all of them responsible in some way for value, market and supply chain elements such as production, marketing, processing, packaging, transportation and wholesale and retail sales. Given the potential of agribusiness industries, it is essential to bring interests together and focus efforts toward addressing common concerns, opportunities, and strategies. Through its projects around the world, J.E. Austin Associates, Inc. (JAA) has applied business-driven principles, market-led approaches and competitiveness tools to agribusiness and the agriculture sector—involving market and demand analysis, development and expansion of agribusiness markets, skills development and dissemination, strategy, linkages to finance, and policy advocacy. JAA has made significant contributions to emerging economies in developing programs that would link low-level agricultural production issues to the potential high-level context of building modern and competitive agribusiness.

JAA's competitiveness and other agribusiness methodologies focus on the identification and development of those key industry and sub-industry clusters offering significant opportunities for private investment and for achieving a sustainable competitive advantage. JAA works with individual agribusiness companies and specific organizations to improve firm and organizational-level strategy and performance. JAA developed the ASSETS Model (Agribusiness Services to Support Economic Transitions) to serve as a component of donor loan packages or potential grants from the Multilateral Investment Fund (MIF) to help speed the transition from traditional and protected agriculture to competitive agribusiness systems. JAA also seeks to provide the information and experience that many new or developing industries lack, in part by organizing seminars, writing case studies, and leading workshops on agriculture sector development strategies, international agency lending programs, and agribusiness management.

JAA's experience in agribusiness and agriculture development projects is closely tied to JAA's competitiveness and private sector development experience in that many cluster with which JAA is engaged through the course of a competitiveness project are agriculture-based industries.

Many of the requirements of agribusiness projects are very subsector specific, and JAA has proven its capability to meet these needs. For example:

JAA Project	Agriculture-Related Industry Clusters/Sectors
Sri Lanka Competitiveness Exercise/Initiative	Coir, Rubber, Rubber Services, Spices, and Tea
Croatia Competitiveness Initiative	Wood Products

Southeast Asia Competitiveness Initiative	Fruit (Vietnam), Fisheries (Cambodia), High Value Added Agriculture (Thailand), Seafood (Thailand), and Silk (Thailand)
Uganda Competitiveness Exercise	Cut Flowers, Fisheries, and Coffee
Uganda SPEED Project	Dairy, Cotton, Coffee, Fish Processing, Fish Farming, Tea, and Maize
Zambia Agribusiness Technical Assistance Project	Oilseeds, Dairy, Tree Crops, and Coffee
Agribusiness Development Assistance in Rwanda Project (ADAR)	Pyrethrum, Anthurium, Roses, and Coffee
Agribusiness Development Assistance in Nigeria	Ginger, Sesame, Hides & Skins, Gum Arabic, Shrimp, and Cashew Nuts
Colombia Alternative Development	Rubber, Cocoa, Vegetable Oils and Meal, Organic and other Specialty Coffee, Pepper, Hearts-of-Palm, Fish, and Bamboo.

JAA holds a subcontract on the USAID RAISE IQC through Chemonics.

Listed below are examples of ongoing and completed projects:

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Rwanda, Agribusiness Development Assistance in Rwanda (ADAR) USAID

JAA was a part of the consortium core team that carried out a number of baseline studies of the agriculture and agribusiness sector in Rwanda and designed a USAID program to support the

growth of the sector. The program design focused on increasing production and marketing, on value added, and on increasing exports. In addition to preparing the draft of the ultimate design, JAA specifically examined policy issues, the transport sector, the packaging industry, and the potential design of an agribusiness support center.

The consortium that carried out this work was then awarded the implementation of the project by competitive tender. The implementation portion of the project is intended to make a measurable impact on Rwanda's agricultural production and exports, and development strategies. The project provides an agribusiness development center (ADC)—a “one-stop-shop” to help agribusinesses to obtain information and technical assistance, to access markets, and to finalize “deals”. The project also provides special initiatives, loan guarantee funds, training, and partnerships with U.S. agribusiness and environmental NGO communities. JAA's participation on this project has focused on providing technical assistance on exportable products such as pyrethrum, anthurium, roses, and coffee.

Agribusiness Development Assistance in Nigeria USAID

JAA helped to design a program for USAID to assist Nigerians to massively increase agricultural and agribusiness exports. The program used a highly inclusive process to identify target product groups, examine their potential for program focus, and develop specific action plans for each product group. At a national summit co-chaired by the Ministers of Agriculture and of Commerce, 6 product groups were selected for particular focus: ginger, sesame, hides & skins, gum Arabic, shrimp and cashew. The program also jump started several initiatives to immediately work with producer/marketers. The analytical and “action” processes carried out with the clusters included competitiveness approaches such as cluster development and value chain analysis.

JAA was then asked, as a matter of high urgency, to provide assistance to Nigerian stakeholders to identify opportunities for the apparel/textiles industries under AGOA, and to develop recommendations and action plans to jump-start investment and exports through AGOA.

Colombia Alternative Development USAID

The Colombia Market and Technology Assessment Project focused on determining which agricultural and forest products the small landholders and indigenous people of Putumayo and Colombia can use to replace coca and poppies—and become competitive in doing so. To provide market and technical information on products identified in grant proposals, JAA compared Colombia's product markets to world markets. Products suggested for the Colombian market study are processed beef, fish, fruits, hearts-of-palm, vegetables, and plants for industrial and medicinal use; and for the world market study, products suggested were rubber, cocoa, vegetable oils and meal, organic and other specialty coffee, pepper, hearts-of-palm, fish, and bamboo. JAA's final report assessed the compatibility of products with processing technologies to determine by how compatible the attributes of substitute products are with processing technology and the operating and capital costs of that technology.

Zambia Agribusiness Technical Assistance Centre Project (ZATAC) USAID

The project is establishing the Zambian Agribusiness Technical Assistance Centre (ZATAC) as a self-sustaining agribusiness support organization. The project and organization's mission is to increase rural incomes through growth of rural non-farm enterprises, linking production to markets. JAA, as a long-term member of the core team, carried out the baseline survey and established the monitoring system, conducted several commodity-specific and sectoral studies

(e.g. oilseeds, dairy, tree crops, coffee), developed the business skills component of the project, and provided other short-term technical assistance to various programs. The project has particular focus on identification of market demand and business opportunities, commodity system analysis, regional and overseas supply, market and investment issues, transport-related issues, and institutional issues. ZATAC has been successful in bringing the small farm holder perspective to the attention of national leaders through its contributions to the National Irrigation Policy Review and Strategy workshop in 2002.

ZATAC is now implementing the final phases of the project, which will focus on the passing of activities to an independent, sustainable Zambian-led organization called ZATAC Ltd. The primary work of ZATAC, Ltd will be to increase the income and improve the quality of life of rural Zambians through alliances fostered between agribusinesses and rural enterprises that buy from and sell to small producers.

Africa and Latin America: Agricultural and Agribusiness Surveys

World Bank

JAA designed and implemented surveys of private firms to gather baseline descriptive statistics on the formal and informal private sectors and data on entrepreneurs' perceptions of institutional and policy bottlenecks, training needs, and business opportunities. JAA conducted regional surveys in *Cameroon, Kenya, Ghana, Lesotho, Madagascar, Swaziland, Rwanda, the Dominican Republic, Costa Rica, and Panama*. These surveys cover many firms in agriculture, agro-processing, manufacturing, commerce, and financial services sectors. Hundreds of surveys were conducted to develop private sector assistance strategies and to evaluate and monitor foreign donor programs.

Future of Multilateral Lending to the Agribusiness Sector

InterAmerican Development Bank (IDB)

JAA designed and implemented a conference on the future lending strategy for the agribusiness and rural development sectors. JAA conducted seminars on promoting agricultural competitiveness, public-private partnerships, and rural savings. The World Trade Organization (WTO) supported small farmers in meeting credit needs and price and income factors. The support led to preparation of the agricultural sector of WTO. The financial mechanisms that were created to enhance agribusiness include inventory finance, bonded warehouses, liens, secured transactions, and commodity exchanges. JAA also created additional mechanisms such as commodity commercialization, and agribusiness systems approach, and agriculture-related infrastructure to foster agribusiness growth worldwide.

Mozambique: Cashew Industry Assessment

Grupo Entrepuesto

Grupo Entrepuesto, the largest private-sector company in Mozambique and a holding company for agribusinesses in Portugal, Spain, and Mozambique, contracted with JAA to conduct an agribusiness systems assessment of the cashew industry of Mozambique. JAA advised Grupo Entrepuesto on techniques to improve competitiveness, export pricing, and cost control strategies for a newly liberalized national environment.

InterAmerican Development Bank (IDB) Agribusiness Seminar & Workshop

InterAmerican Development Bank (IDB)

JAA reviewed the IDB agricultural sector strategy, recommended "think pieces" for future IDB lending programs in this sector, and helped organize the Agribusiness Conference in Israel. At the conference, JAA participated in discussions of the compatibility of agribusiness and sustainable agriculture, the relevance of agribusiness to small farmers and social concerns, market-driven approaches, balanced agriculture and rural development, and the role of

institutions. JAA recommended a “broad systems” approach to link agricultural production to building of competitive agribusiness systems.

**Panama: Inter-American Institute for Cooperation in Agriculture (IICA)
InterAmerican Development Bank (IDB)**

JAA collaborated with members and potential members in designing the Inter-American Institute for Cooperation in Agriculture (IICA), an agribusiness association, with funding from the Multilateral Investment Fund of the IDB. JAA conducted more than 20 agribusiness surveys to analyze the need for services and to establish the type of services in demand. The project launched the IICA as a provider of technical and managerial services to agribusiness in Panama.

**Honduras Agricultural Policy Reform
USAID**

JAA coordinated the implementation of the Honduran Agricultural Sector Adjustment program, which through a US\$110 million sector loan, helped modernize the country’s agricultural sector. This far-reaching program dealt with price liberalization, land and tree tenure, rural finance, and public sector management. JAA provided expertise at the outset of the project to set priorities and guide project implementation. JAA also provided two cluster competitiveness and regional development experts to analyze the prospects for secondary cities to attract light industry. Finally, the JAA CEO made a presentation to a Honduran parliamentary (congressional) delegation.

**Trinidad & Tobago: Developing Competitive Agribusiness
InterAmerican Development Bank (IDB)**

JAA has developed the ASSETS Model (Agribusiness Services to Support Economic Transitions) to help speed the transition from traditional and protected agriculture to competitive agribusiness systems. The model can be used to enable traditional producers to break into non-traditional markets with new products. The model was developed in the course of a series of sectoral strategy and structural adjustment assignments for the InterAmerican Development Bank in Trinidad & Tobago. The model can serve as a component of loan packages or potential grants from the Multilateral Investment Fund (MIF).

JAA also assisted with the preparation of an action plan and revaluation of sector policy for the Government of Trinidad and Tobago. JAA then finalized Action Plans for the program components in the following areas: trade and price policy; land and water use, state owned enterprise reform, public sector administration, and social impact mitigation.

**Trinidad and Tobago: Preparation of the Agriculture Sector Reform Program
InterAmerican Development Bank (IDB)**

Assisted the InterAmerican Development Bank in preparing the structural adjustment loan—that component which dealt with assisting private sector associations to help members become competitive. JAA also assisted with final preparation of Terms of Reference for Implementation of Technical Cooperation Program in Trinidad and Tobago.

**Guatemala: Study of the Value Added Survey for Selected Product Groups in the
Guatemalan and Bolivian Non-Traditional Export (NTE)**

USAID and Gremial de Exportadores No Productos No Tradicionales (GREMIAL)

JAA collaborated with Bolivia’s Minister of Planning of Bolivia to develop an NTE strategy for the Bolivian agricultural and agro-industrial sector. JAA conducted an analytical survey to estimate the value added for selected NTE products. The study used three data sources: a firm-specific survey of nontraditional exporters in Guatemala, cost and operating structure information for

selected product groups gathered by local industry specialists, and product price information drawn from US-based research. Data were compiled in dBase IV to provide information on a company or product group, to facilitate tracking businesses' performance, and to ensure easy updating of baseline responses. Our database methodology integrated 20 project groups encompassing agribusiness manufacturing and handicrafts.

Investment Opportunities in Venezuelan Agribusiness World Bank—Foreign Investment Advisory Service (FIAS)

JAA assisted the National Council for Investment Promotion (CONAPRI) in identifying attractive segments in the Venezuelan agribusiness sector. JAA gathered data on 24 agribusiness segments. The selection was narrowed to six sectors—poultry, tuna, tilapia, forestry plantations, and paper and paperboard. The Venezuelan market is the largest, wealthiest, and most sophisticated in the Latin American region. Most businesses in Venezuela also enjoy competitive advantages and are therefore structurally attractive for investment.

Dominican Republic: Agroindustry Management and Marketing ISA

JAA conducted many seminars for businesspeople and students in agro-industry management and marketing, leading the agricultural management program at the primary agricultural university in the Dominican Republic. JAA institutionalized the management school of ISA, training faculty, supervising case studies, implementing curricula, and developing policy initiatives. JAA's institutional training included three modules of a course in agro-industrial project management and courses in agro-industrial systems analysis, marketing, and strategy formulation and implementation. Analysis and reform work included conceiving, organizing, and executing briefings for political leaders. JAA assisted ISA in winning bids for self-financing outcomes.

Ghana: Agribusiness Marketing USAID

To help stimulate investment in processing technologies while modernizing agribusiness systems in Ghana, JAA examined how to add value through food packaging and processing of staples for domestic consumption while expanding shelf life, improving the qualities valued by domestic consumers, and reducing post-harvest loss. JAA helped identify and contract potential investors, including them in the survey and interview design, and suggested the kinds of critical information that the food technologists should help supply. JAA also examined the client segment that was most likely to be served by such investments.

Haiti: Private Sector Assessment and Strategy Development USAID

JAA assisted USAID in the design of a private sector assistance strategy and provided recommendations for assisting private enterprise growth in Haiti. Activities included analysis of constraints and opportunities for private enterprise development; competitiveness analysis of specific industry and sub-industry sectors (light manufacturing/assembly, handicrafts, tourism, finance, agro-industry, construction); evaluation of policy, finance and regulatory frameworks; assessment of public-private dialogue and joint planning; and analysis of the prospects for free trade zone development and foreign investment promotion, and linkages between secondary cities and rural and small urban areas. The analysis included extensive review of domestic and international transport infrastructure and transport services, financial issues pertaining to transport, and private sector investment in transport infrastructure and privatized services.

**Panama: InterAmerican Institute for Cooperation in Agriculture (IICA)
InterAmerican Development Bank (IDB)**

JAA worked closely with both members and potential members of an association of agribusinesses to design a project, which has subsequently been approved for funding by the Multilateral Investment Fund of the IDB. The project launched the association as a provider of technical and managerial services to agribusinesses in Panama. The project was designed to enable the association to become self-reliant by the end of the project period.

As part of the design process, JAA designed and conducted a survey of 22 agribusinesses in order to analyze the need for services and to establish the types of services being demanded. The survey data was invaluable in the design of the project, enabling JAA to provide more precise indicators of the level and type of technical assistance services, which were going to be required. It also provided a strong rationale for the project.

**Nicaragua: Microenterprise Lending/ Technical Assistance
InterAmerican Development Bank (IDB)**

JAA conducted a mid-term institutional evaluation of the Instituto Programa Nacional de Apoyo a la Microempresa (PAMIC) Project, which is funded by the IDB and the Government of the Netherlands. PAMIC focuses its work on ten credit unions, eight NGOs, five agricultural cooperatives, and two financial intermediaries. Two credit unions were examined in detail using the standard classification. JAA trained PAMIC staff in methodology and data collection adjustments needed with NGOs so that managers will have ready access to information at PAMIC and for use in future project evaluations.

**Venezuelan Palm Oil Study and Mavesa, S.A., Reorganization Plan
Private Clients**

At the request of a leading Venezuelan agribusiness company investing in palm oil, JAA commissioned an independent study of the effects of palm oil on human health from Foster Bio-Medical Laboratories at a leading U.S. university.

JAA also assisted Mavesa Venezuela Palm Farm, a large consumer products company in Venezuela, in a corporate strategy and re-organization effort. JAA helped Mavesa find international companies interested in acquiring part of its assets.

**Dominican Republic: Tourism-Agriculture Summit
USAID and Dominican Republic Agribusiness Council (JAD) and ASONAHORES
(Tourism Association)**

JAA conceptualized and implemented the first summit meeting between leaders from the tourism and agricultural sectors of the Dominican Republic economy, with the goal of fostering closer planning between the two sectors and generating more local agricultural demand. The specific food demand of the tourism sector was quantified, projections of future demand were made, and the need of the sector for more reliable supply was aired.

**South Sea Islands: South Sea Coconuts Market Study
Appropriate Technology International (ATI) and South Sea Island Stakeholders**

JAA carried out a study analyzing the possibilities for adding value to raw coconuts, the major export product for many South Sea Islands. The potential was found to be rather limited even after interviewing major international companies that use value-added products such as oils and cosmetics.

Madagascar: Commercial Agricultural Promotion (CAP) Project Design USAID

JAA participated in the design of the Commercial Agricultural Promotion (CAP) Project. The ultimate goal of the project was to increase private investment and employment in commercial agriculture by expanding cash based trade in two high potential zones.

People's Republic of China: Case Study and Agribusiness Systems Training World Bank

JAA helped train Chinese leaders from the Agricultural Bank of China, Ministry of Agriculture and the Northeast Forestry University in the case study method and agribusiness systems approach. The workshop represented the first phase of a long-range program that called for these leaders to return to China to train trainers from the five main national agricultural institutions in agricultural policy, project analysis and management. The project included a focus on creating local capability.

Colombia Poultry Study United States of America Poultry and Egg Export Council (USPEEC)

JAA obtained market information on the Colombian poultry market, made observations on relevant government policy, and assessed the feasibility for increasing US poultry and egg export in Colombia. JAA also provided market penetration strategy recommendations.

Colombia, Ecuador and US: Southern Rainbow Private Client

JAA advised this private agribusiness firm on how to improve financial results and expand market share, providing analysis of corporate strategy, operations, markets and strategic management. Advised on integration of Latin American production with logistics and marketing in the USA.

Analysis of the Role of Multinationals in Foreign Direct Investment World Bank—Multilateral Investment Guarantee Agency (MIGA)

For a summit of investment promotion agency heads, JAA provided a review and analysis of the role of multinationals in foreign direct investment related to the agricultural and agro-enterprise sector and provided a strategy for attracting investment in this sector. Investment promotion agencies from 18 countries participated in the summit. JAA analyzed this from the point of view of the corporate strategies giving a window on the motivations behind their investment decisions. JAA included 25 corporations in this exercise.

Rwanda: Economic Recovery Credit World Bank

JAA provided the services of a Privatization and Private Sector Development Specialist to The World Bank, as the sole external member of a 4-person World Bank team carrying out a preappraisal for a new economic recovery credit. The specialist evaluated and made recommendations regarding ongoing programs for privatization of state-owned industry, and reorganization and development of the environment for private enterprise. Particular focus also included restructuring of the Chamber of Commerce and Industry, development of sectoral and other business associations, creation of the Rwandan Investment Agency, a comprehensive legislative program, the impact of tariff and other changes on business, restructuring (privatization, market liberalization) of the tea and coffee industries, and liberalization and enterprise development in the agricultural sector.

Mali: Investors' Roadmap Study
World Bank—Foreign Investment Advisory Service (FIAS) and International Finance Corporation (IFC)

JAA provided an expert to FIAS as the sole external specialist for this study. Detailed and examined procedures for establishing an enterprise, for investment, and for obtaining and developing land, identified constraints, presented recommendations for reform. The study concerned industry and commercial investment in general, and also included sectoral focus on agriculture and tourism.

Trade and Investment

Through our trade and investment projects worldwide, J.E. Austin Associates, Inc. (JAA) has helped companies, business associations, government agencies, and ministries develop promotion strategies; generated interest among international leaders seeking to promote trade and investment growth in emerging economies; and developed proprietary methodologies for assessing investments and for linking opportunities to investors.

JAA's work on trade and investment is highly linked with its competitiveness, institutional change and sectoral activities. Much of JAA's competitiveness work is directed towards increasing trade effectiveness and results, and encouraging productive foreign and domestic investment. Our work in facilitating effective public-private dialogue and decision-making leads directly to improvements in the trade and investment environment of many countries. JAA has successfully assisted client countries to restructure investment promotion agencies, introduced best practices benchmarking procedures and carried out administrative barriers assessments. JAA has assisted business associations and clusters to reduce barriers to trade in inputs and exports, to access new markets, and to achieve dramatic increases in international sales.

Listed below are examples of ongoing and completed projects:

Zambia Trade and Investment Project (ZAMTIE) USAID

JAA is subcontractor to Nathan Associates for the the USAID project known as the Zambian Trade and Investment Enhancement Activity (ZAMTIE). The project is assisting USAID to carry out part of its Country Strategic Plan aimed at bringing about an improved trade and investment environment. The project has 3 main components: (1) reducing barriers to trade and investment, (2) capacity building in the public and private sectors to facilitate economic growth and reduce poverty, and (3) fostering linkages to optimize rural income-generating investment and trade opportunities between and among producers, suppliers, processors, traders, service providers, and consumers within and outside of Zambia. The project is also active in helping Zambia to realize opportunities to attract and establish foreign investment in Zambia.

JAA is providing services focused on business service organizations, institutional improvements, sectoral strategies and improved business initiative. Much of this work is in the context of the implementation of national policies focused on increasing private investment, decentralizing services and governance, and economic diversification. The project's sectoral emphasis included agriculture and agribusiness, tourism and industry.

As part of this project, for the tourism sector, JAA helped the private sector apex body, the Tourism Council of Zambia (TCZ), and its membership, to develop an organizational and service delivery strategy, and implementation plan.

Most recently, JAA carried out strategic/management audits of four regional business service organizations: Eastern Province Chamber of Commerce and Industry (EPCCI), Kabwe Chamber of Commerce (Central Province), Kabwe District Business Association and Livingstone Tourism Association. Using a highly participative process that emphasized economic growth opportunities and service provision, JAA helped these four associations to identify their strategic and management priorities, and develop initial action plans for implementation and project assistance.

For Eastern Province, JAA assisted the Province's business stakeholders to develop a regional business and investment growth plan, with particular focus on sectoral opportunities, export promotion and improvements in the business environment. Following from the EPCCI strategic/management audit, JAA led a team to assisted business stakeholders in the Eastern Province to define an action-oriented plan. The Plan identifies and describes more than 25

investment opportunities that can be actively promoted by the Province, recommends a plan of action to improve the investment environment, and recommends actions to improve public-private collaboration. The planning process involved discussions with businesses and stakeholders in 6 Districts, numerous group meetings and roundtables, a preliminary workshop that resulted in the Province's first clear commitment to joint public-private action to increase investment, a draft report, review and discussion, and finalization. With JAA's facilitation, the Province's stakeholders agreed on a structure (led by EPCCI) and plan for implementing the recommendations of the study, and for achieving marked increases in the quantity and quality of business investment in the Province.

**Uganda, World Bank First and Second Private Sector Competitiveness Project, 2002-2003
World Bank—Foreign Investment Advisory Service (FIAS); Uganda Ministry of Finance,
Planning, and Economic Development (MoFPED); Private Sector Foundation Uganda
(PSFU)**

JAA carried out a series of assignments under the World Bank First and Second Private Sector Competitiveness Projects, including:

- Study of Administrative Barriers in Uganda Update;
- World Bank—Foreign Investment Advisory Service (FIAS); and
- Assistance in Improving Investment-Related Services

For the Foreign Investment Advisory Service (FIAS) of the World Bank in Uganda, JAA provided assistance to assess investment procedures. JAA's services included assisting the GoU to draft a Presidential Statement on investment policy, providing the sector-specific expertise to update the 1997 Administrative Barriers Study and to demonstrate the impact of administrative barriers on businesses' ability to implementing competitive strategies (using the coffee, fish processing and AGOA-related apparel industries as examples), and defining follow-on actions. JAA also prepared a technical note on AGOA-related procedures.

JAA's work helped FIAS to consider and test new analytical approaches that link administrative barriers to competitiveness priorities, and used the Coffee, Fish Processing and AGOA-related Apparel industries as examples.

The work was closely linked to a PSFU (Private Sector Foundation) activity, funded by the World Bank Competitiveness Project, to consider an "Investors' Bill of Rights" and its linkage to Client Charters, and to conceptualize a process to benchmark Ugandan performance on key investment-related services. This work was also performed by JAA.

JAA also provided assistance to the World Bank and GoU for the preappraisal of the Private Sector Export Competitiveness Project (2nd Private Sector Competitiveness Project). JAA provided guidance on competitiveness issues and approaches, on institutional arrangements, and on mechanisms for enabling private sector input into prioritizing improvements in the business environment.

**Turkey: Administrative Barriers to Trade and Investment
World Bank—Foreign Investment Advisory Service (FIAS) and Treasury of Turkey**

JAA assisted FIAS to carry out an Administrative Barriers Study for Turkey by focusing on administrative barriers to investment in taxation and site development as. As part of an international team, a JAA staff member led interviews and discussions with public and private parties; collected and compiled relevant information in cooperation with the local consultants; identified major issues and exploring solutions; and collected inputs from all parties as required later for preparing the report. At the end of the mission, led the team's efforts for preliminary assessments and recommendations regarding procedural problems, and prepared the necessary inputs regarding for the wrap-up meeting. After the mission, JAA personnel prepared written inputs to the final FIAS report including a detailed description of the approval procedures as required in the areas under JAA's concern, and an elaborated analysis of the problems

identified. JAA also provided a comparison of local Turkish practices with international best practices in various fields and recommended how the government of Turkey could improve the regulatory and administrative environment for business. Preliminary findings were delivered in a brief presentation to the staff of the Turkish Treasury.

Nicaragua Development Strategy for Light-Manufacturing and Textiles/Apparel Sectors Unidad de Coordinación del Programa de Reforma y Modernización del Sector Público (UCRESEP—Edificio de la Vice-Presidencia de la República)

JAA carried out an analysis of the light-manufacturing sector in Nicaragua as input to their development strategy for attracting foreign direct investment. JAA's activities on the project were structured into three phases as follows:

Phase I: Sector Analysis—JAA provided a detailed description of each of the selected sectors to allow for a better understanding of the sector. These analyses include a description of the general factors that influence general and sector-specific investment flows and the principal factors that businesses, in each sector, use in determining where to make foreign investments.

Phase II: Competitive Sector Analysis—In this phase, JAA provided a study of Nicaragua's competitiveness in relation with other countries of the region and other regions of the world that have had success in attracting Foreign Direct Investment (FDI) in the sectors selected in Phase I, such as India, Eastern Europe (Romania, Bulgaria, Russia) and Asia (Thailand, Laos, China, Bangladesh). This analysis included information on positive and negative tendencies affecting business behavior as well as FDI flows that affect Nicaragua's competitiveness. This study also included information on the ability of medium-sized local enterprise in Nicaragua to integrate into the value-added chain.

Phase III: Sector-Specific Strategies—Based on the previous analysis in Phase I and II, those sub-sectors with the highest potential was chosen and a report was drafted that includes specific policy recommendations that would improve the business climate and the short- and long-term factors of production/distribution in each sector.

Investment Promotion Agency Case Studies (Tunisia, El Salvador, Uganda, Czech Republic)

World Bank—Foreign Investment Advisory Service (FIAS)/Multilateral Investment Guarantee Agency (MIGA)

FIAS and MIGA contracted JAA to carry out a study of investment promotion agencies (IPAs) in Tunisia, Uganda, El Salvador and the Czech Republic. These studies were a follow on to a survey completed by FIAS and MIGA of IPAs worldwide. The purpose of the case studies was to contribute to the general stock of knowledge on IPAs; to help enrich and support existing and planned programs for investment promotion; and to serve as a guide to designing effective training programs for IPAs. The studies included information on the context in which each IPA is operating, on the organizational structure of each IPA, on lessons learned through the promotion strategies implemented by each as well as conclusions on the success and obstacles faced by each. Overall, the studies assisted the World Bank Group in testing the robustness of the key findings of the previous survey; provided a deeper understanding of the elements of effective IPAs; and identified lessons learned by IPAs in Tunisia, Uganda, El Salvador and the Czech Republic.

Mali: Investors' Roadmap Study

World Bank—Foreign Investment Advisory Service (FIAS) and International Finance Corporation (IFC)

JAA provided an expert to FIAS as the sole external specialist for this study. Detailed and examined procedures for establishing an enterprise, for investment, and for obtaining and

developing land, identified constraints, presented recommendations for reform. The study concerned industry and commercial investment in general, and also included sectoral focus on agriculture and tourism.

Assistance to Inversiones Consolidadas de Honduras, S.A. de C.V (The INCONHSA Group)

Inversiones Consolidadas de Honduras, S.A. de C.V (The INCONHSA Group)

The INCONHSA Group, based in Honduras, is one of the largest Central American business groups. JAA carried out a series of assignments, providing advice and assistance initially to improve The INCONHSA's internal organizational and management structures. JAA provided technical assistance and guidance to improve productivity and devolve responsibility to motivated teams; to focus on people and customers; to evaluate business opportunities; and to developing focused business plans. JAA the assisted INCONHSA to developed international marketing plans, and to consider a regional investment strategy, including linkages with other regional investors.

Agricultural Development Assistance in Rwanda (ADAR)—Transport Sector Assessment and Agricultural Analysis and Design (AAD)

USAID

As an element of the program of Agricultural Analysis and Design (AAD) for Rwanda, carried out as preparation for the ADAR project, JAA carried out a transport sector profile, with emphasis on the impact of the transport sector on agribusiness and its prospects.

JAA was a core participant in the AAD activity. AAD provided information and suggested intervention strategies, approaches and activities suitable for achieving the USAID strategic objective (SO) of creating and enhancing internal production/marketing chains that promote broad-based economic growth.

The cross-cutting Transport Sector assessment identified and examined the transport-related issues and opportunities for Rwanda agriculture in general; identified and examined in particular the related transport issues and opportunities for selected commodity chains; and provided specific recommendations for project interventions in the area of transport.

The assessment examined and provided recommendations concerning various modes of transport (principally road and air), transport corridors, industry structure, infrastructure and related service constraints, transport costs and pricing, cold chain issues, productivity issues, legal and regulatory issues, and in particular, the role and played by transport providers as elements of key industry clusters. The assessment examined a number of product chains, including tea and coffee, Rwanda's primary foreign exchange earners, and high and low value perishables.

Non-Fiscal Incentives to Investment within the East Africa Community (EAC)

World Bank—Foreign Investment Advisory Service (FIAS)

The EAC has, as part of its current 5-year work program, three programs for "harmonizing" trade, tax and investment. FIAS/WB is working with the IMF on the investment "harmonization" issues, with the IMF looking at fiscal incentives (chiefly corporate tax breaks and holidays, and tax/customs administration systems) while FIAS/WB will look at non-fiscal incentives to capital and labor.

JAA is supporting this initiative by providing the services of a specialist in workforce and labor issues. JAA looked at the incentives (and disincentives) given by Kenya, Uganda and Tanzania to labor. JAA is providing a comparative analysis of the incentives and disincentives available to investors, including a comparison with international best practices, identification of areas where "harmonization" is necessary or desirable between the three countries, and providing recommendations for a "harmonization" program with a roadmap for converting

specific recommendations into practical steps that can be pursued at a regional and/or national level.

**Feasibility Study for Construction of a Gem-Cutting Factory in a Free Zone
Ministry of Mines & Energy, Madagascar/International Finance Corporation (World Bank)**

Madagascar has a variety of mineral resources of precious and semi-precious gemstones but its exports consist mainly of rough gemstones at a very low value due to a lack of a gem cutting and shaping capacity. In an effort to reform the gems industry in Madagascar, the Ministry of Mines & Energy hired JAA to advise the government and to guide the preparation of a feasibility study for the construction of a gem-cutting factory in a free zone setting, in collaboration with local consultants contracted by the Ministry.

Over a 9-month period, JAA assisted the team of local consultants with the selection of potential sites for the establishment of a factory, and established the parameters of the feasibility study during the first visit to Madagascar. JAA's team comprised essentially a Senior Gems Specialist, a Free Zone Specialist and a Gems Cluster Competitiveness Expert who provided technical assistance to both the client and the team of local consultants. JAA's team provided a one-day presentation of their findings relating to the Malagasy context in comparison to best practices in the world in places such as Sri Lanka and Thailand. The audience of the presentation included government officials, donor organizations (USAID, World Bank, etc.), the private sector and other stakeholders.

JAA's team examined both the administrative bottlenecks and the legal framework that regulates the gems industry in Madagascar, and provided the client and the World Bank with an overall roadmap for the development of the gems sector that was presented to the President of Madagascar. JAA's team directed and evaluated the feasibility study conducted by the team of local consultants, and then provided overall and final recommendations that were presented to the client for the development of the gems sector in Madagascar.

**Road Concession Program for Sao Paulo State
USTDA**

With Apogee Research and a Brazilian partner, JAA assisted Sao Paulo State to attract foreign investment in 2500 kms of long-term highway concessions. JAA and its partners provided an independent review of the issues of concern to potential investors and operators, such as institutional and legal frameworks, tender procedures, review of feasibility studies, and risk analysis.

**Venezuela/United States: Joint Venture Negotiation
Private Client**

JAA organized a joint venture for a major Latin American agribusiness and consumer products company in need of access to US biotechnology capabilities to improve production capability in Latin America. JAA analyzed the US biotechnology leaders, identified the group with the best capability, and assisted in negotiating the joint venture on equitable terms. JAA personnel have since assisted by serving on the Board of Directors of the joint venture and assisting in the development of business plans.

**Venezuela Investment Promotion
Venezuela Investment Promotion Agency**

JAA prepared investor profiles for fifteen agroindustries for which the Venezuelan investment promotion council was attempting to attract investment. JAA assisted other governments by similar means, identifying the most promising sectors for subsequently attracting investment.

Congo and Cote d'Ivoire
USAID/Corporate Council for Africa

JAA prepared comprehensive Critical Issues Guides for US investors in these countries. The Guides were prepared for trade missions organized by the Corporate Council for Africa.

United States: Agricultural Export Training
Educational Development Center

JAA assisted the international division of the Educational Development Center of Newton, Massachusetts in developing a project on agricultural export training.

Dominican Republic: Training Needs Assessment.
USAID

JAA provided assistance on a training needs assessment of the free trade zones in the Dominican Republic. JAA assisted in the design of the survey questionnaire and participated in the interviews to determine the training needs of companies in the apparel, footwear and other sectors.

United States: Cocoa Industry Project Support
Columbus Investment Fund

JAA provided support in gathering and analyzing information on the cocoa industry for the Columbus Investment Fund.

Privatization—Davao Region, Philippines
USAID

JAA conducted a comprehensive survey of existing resources available in the Davao region, including natural resources, human resources, capital resources and intangibles. JAA facilitated strategic planning sessions with community leaders from both the public and private sectors and developed sector specific investment incentive packages incorporating both national and local elements. Additionally, JAA designed and produced world-class promotional materials highlighting data relevant to identified target sectors. JAA also created a region and sector-specific database and helped establish an investment promotion office.

Russia: ICM Textiles
European Union and ICM

JAA provided training for chief executives from 30 leading textile companies in Russia, under funding from the European Union and in conjunction with ICM - Paris. The executives were from recently privatized firms. JAA prepared and presented 2 five day seminars on "The Product Development Cycle and Marketing Management" in Moscow. Topics discussed included competitiveness, export strategies, cost control, maintenance of quality, etc. A particular focus was aligning production to the private development life cycle in the fashion industry. JAA developed case studies tailored to the current situation of the Russian textile and clothing companies.

Market Research in Central and South America, the Caribbean, and Africa
Zeigler Brothers

JAA conducted market research in Central and South America, the Caribbean, Africa, as well as other regions of the world to provide Zeigler Bros. with marketing information, which enabled it to expand sales of its products and services into developing countries of the world.

Venezuela: Investment Opportunities in Venezuelan Agribusiness World Bank—Foreign Investment Advisory Service (FIAS)

JAA assisted the National Council for Investment Promotion (CONAPRI) in identifying attractive segments in the Venezuelan agribusiness sector. JAA gathered data on 24 agribusiness segments. The selection was narrowed to six sectors—poultry, tuna, tilapia, forestry plantations, and paper and paperboard. The Venezuelan market is the largest, wealthiest, and most sophisticated in the Latin American region. Most businesses in Venezuela also enjoy competitive advantages and are therefore structurally attractive for investment..

Business and Economic Conditions Assessment for Investors in Guinea Labat-Anderson, Inc. (LAI)

JAA assisted LAI in preparing briefing materials on business/economic conditions in Guinea. JAA participated in planning efforts, including meetings with designated officials in AFR/ONI, the Overseas Private Investment Corporation (OPIC), LAI staff, and others; JAA prepared substantial portions of the country report on Guinea, including Sections on the Role of the State in the Economy, the Investment Climate, and Regulation of Foreign Investment; reviewed and edited chapters on the Political, Social, and Economic Background, the Economic Performance and Outlook, Sectoral Analysis of the Economy, Regulation of Foreign Investment, Infrastructure, Foreign Trade and Balance of Payments, External Debt and Aid, Financial Sector, Inflation and Price Controls, Public Finance, and Taxes and Their Application.

Corporate Training and Strategic Management Assistance G.E. Aircraft Engines/SIGMA

JAA consulted in corporate training for strategic management in developing countries, interpretation of national strategies, and understanding industry structure and competitive dynamics. The training also included business - government relations and finance issues, such as coping with inflation, foreign exchange exposures and capital scarcity.

Trade and Investment Projects in Russia, South Africa and Zimbabwe Overseas Private Investment Corporation (OPIC)

JAA staff provided assistance in planning and implementing investment missions through the Overseas Private Investment Corporation (OPIC) to encourage trade and investment between the United States and Russia, South Africa and Zimbabwe.

South Africa: Gauteng Province Regional Investment Promotion The British Council

JAA provided technical assistance for the establishment of a regional investment promotion agency in Gauteng Province.

Analysis of the Role of Multinationals in Foreign Direct Investment World Bank—Multinational Investment Guarantee Agency (MIGA)

For a summit of investment promotion agency heads, JAA provided a review and analysis of the role of multinationals in foreign direct investment related to the agricultural and agroenterprise sector and provided a strategy for attracting investment in this sector. Investment promotion agencies from 18 countries participated in the summit. JAA analyzed this from the point of view of the corporate strategies giving a window on the motivations behind their investment decisions. JAA included 25 corporations in this exercise

Rwanda: Economic Recovery Credit

World Bank

JAA provided the services of a Privatization and Private Sector Development Specialist to The World Bank, as the sole external member of a 4-person World Bank team carrying out a preappraisal for a new economic recovery credit. The specialist evaluated and made recommendations regarding ongoing programs for privatization of state-owned industry, and reorganization and development of the environment for private enterprise. Particular focus also included restructuring of the Chamber of Commerce and Industry, development of sectoral and other business associations, creation of the Rwandan Investment Agency, a comprehensive legislative program, the impact of tariff and other changes on business, restructuring (privatization, market liberalization) of the tea and coffee industries, and liberalization and enterprise development in the agricultural sector.

InterAmerican Region: Generating Agricultural Strategy - Organization of Agribusiness Conference and Seminar on Agribusiness Transition - IDB Annual Meeting

InterAmerican Development Bank (IDB)

JAA reviewed IDB agricultural sector strategy and provided recommendations for IDB lending programs for the future in this sector. JAA assisted the IDB in organizing the Agribusiness Conference as part of the organization's annual meeting, held in Israel. JAA also prepared "think pieces" for role of the private sector in agricultural development projects.

Previously, JAA designed and delivered a seminar on "The Agribusiness Transition: from Traditional Farmer to Agro Entrepreneur" in conjunction with the IDB Annual Assembly. The seminar featured a vision for the future, 8 case studies of recent success in Latin America, and workshops to provide recommendations to the IDB.

Mozambique: Cashew Industry Assessment

Grupo Entrepuesto

Grupo Entrepuesto—the largest private-sector company in Mozambique and a holding company for agribusinesses in Portugal, Spain, and Mozambique—contracted with JAA to conduct an agribusiness systems assessment of the cashew industry of Mozambique. JAA advised Grupo Entrepuesto on techniques to improve competitiveness, export pricing, and cost control strategies for a newly liberalized national environment.

Madagascar: Commercial Agricultural Promotion (CAP) Project Design

USAID

JAA participated in the design of the Commercial Agricultural Promotion (CAP) Project. The ultimate goal of the project was to increase private investment and employment in commercial agriculture by expanding cash based trade in two high potential zones.

Finance

J.E. Austin Associates, Inc. (JAA) strengths include development of independent credit reference services, financial sector diagnostics, microfinance training, agricultural credit, strategic planning, and competitiveness tools and diagnostics applied to financial sector industries. JAA identifies opportunities for sustained growth, suggesting interventions in policy, institutions, and technical areas. JAA also facilitates stakeholder dialogue on reform and strategic planning in financial sector development; delivers finance, lending, and investment seminars and conferences that lead to strategy implementation and exercises; provides training for USAID program design staff working in the development and implementation of microenterprise assistance programs; and surveys microenterprise finance in various regions. JAA has also completed projects related to the development of the banking and banking services sectors as well as the development of national stock exchanges. JAA also successfully links financial services with industry groups as productive, interested members of competitive clusters.

JAA holds subcontracts on the USAID Financial Services IQC through Chemonics International and the AMAP Microfinance IQC, through DAI.

Listed below are examples of ongoing and completed projects:

Establishment of a Credit Reference Service in Uganda European Union/Support to Feasible Financial Institutions and Capacity-Building Efforts (SUFFICE) Programme

With the objective of refining the strategy and activities proposed for the establishment of a Credit Reference Service (CRS) for the microfinance industry in Uganda, JAA conducted a market analysis and review of the legal and institutional framework; analyzed identified constraints for the establishment of a CRS and recommended feasible solutions; and conducted an appraisal of the two competing project proposals that requested donor support.

Latin America: Case Studies of Selected Credit Bureaus in Latin America Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ)

International organizations are supporting the use of institutional information services as a way of reducing operational costs of micro finance organizations, and reducing financial risks and barriers to entry for other credit suppliers, all of which should translate into an increase in the credit supply and other financial services for the micro enterprise sector in a given country. JAA identified lessons, crucial conditions for effectiveness, and challenges to be overcome for a proper insertion of the microenterprise sector into the credit reporting system from the experiences of El Salvador, Perú and Uruguay; with the objective of guiding the emergence of information systems, improving the existing ones, and promoting the creation of others where they have not yet emerged.

Mexico: Agricultural Lending of Fideicomisos Instituidos en Relacion con la Agricultura (FIRA)

Fideicomisos Instituidos en Relación con la Agricultura (FIRA)-Banco de México

This study assessed the strategy and the working environment of Fideicomisos Instituidos en Relacion con la Agricultura (FIRA) in order to develop a new strategy for the lending program. This work built on JAA's institutional strategy developed for FIRA in 1991. JAA surveyed 85 firms and organizations in 12 Mexican states, and gathered performance data on the agriculture and financial sectors. JAA worked closely with FIRA leaders to analyze other financial intermediaries in the market, identify FIRA's products and alternative marketing channels, and pinpoint FIRA's advantages when compared with model financial intermediaries in other

countries. JAA then developed a new strategy and vision statement, which guides the organization today.

Recently, JAA prepared and delivered a seminar on world trends in agribusiness for FIRA's senior management. The seminar focused on four areas: technology, markets, support policies, and financial services. After the seminar, JAA facilitated a workshop with FIRA's senior management to discuss opportunities for Mexico's rural sector and the impact of current trends on FIRA's strategy and recommendations for improvements.

Uganda Capital Markets Authority, Establishment of a Stock Exchange USAID

Under an extensive program of technical assistance to the Uganda Capital Markets Authority, JAA assisted in the development of a stock market in Uganda and the creation of a handbook detailing procedures for its establishment and operation. In connection with this work, JAA staff participated in the Regionalization of Southern African Markets Symposium in South Africa and the Workshop of African Stock markets in Egypt.

Financial Sector Reforms InterAmerican Development Bank (IDB)

For the Inter-American Development Bank, J.E. Austin Associates' consultants analyzed the experience with amplifying the Risk Center of the Bank Superintendency to include information on defaults and arrears on loans of all sizes. This, in conjunction with the strengthening of several private credit bureaus, helped to lower the risk of lending to small borrowers. It has contributed to the competition of private banks in lending to this sector by making information better and more transparent.

Dominican Republic: Stock Exchange Seminar ISA

JAA provided short-term technical assistance to ISA for a seminar on emerging markets and the potential for the newly created Santo Domingo Stock Exchange.

United Nations Industrial Development Organization Financial Sector Workshop in South Africa

United Nations Industrial Development Organization (UNIDO)

JAA prepared a workshop to discuss results of recent financial sector study findings and recommendations for a South Africa in transition.

Mexico: Strategic Reorientation Private Financial Corporation Client

JAA assisted in the strategic reorientation of a financial lending group with a US\$18 billion portfolio. JAA's recommendations were geared to advise the group during a period of opening to international markets and policy changes by its national government.

Ecuador: Financial Reporting Private Client

JAA assisted a major multinational company in developing a financial reporting system for transfer pricing which would be transparent and in compliance with the laws and regulations of both the United States and the host country.

**Botswana: Institutional and Financial Analysis of the Roads Sector
Government of Botswana (GoB)**

JAA helped conduct a comprehensive analysis of institutional and financial structures of the Botswana road sector. Areas of focus included making road service responsive to the needs of Botswana businesses and other stakeholders, tying the road sector to requirements for national competitiveness, encouraging decentralized private–public decision-making, and maximizing private provision of services.

**Zimbabwe: Zimbabwe Progress Fund Project
USAID and Harvey & Company**

JAA developed an implementation plan for the Zimbabwe Progress Fund's first year of operations. JAA also identified the first transaction for the Zimbabwe Progress Fund and facilitated its eventual closing, and explored the most appropriate ways that ZPF could cooperate with the Southern African Enterprise Development Fund.

Private Enterprise and Private Sector Development

In designing, conducting, and interpreting private sector assessments, J.E. Austin Associates, Inc. (JAA) has recognized the critical link between achieving private sector development and sustainable increases in income and wealth, and also in supporting the growth of stable democracies. In designing practical programs after these assessments, JAA has gained recognition as an industry leader in fostering sustainable business growth.

JAA's Private Sector Development (PSD) approaches include sound analysis of economies' institutional environment for business, combining competitiveness analyses with quantitative and qualitative data gathering. In this approach, JAA relies on traditional economic data, statistical sampling, and surveys; but also on goal-oriented discussion and information exchange among private and public sector focus groups and business associations. JAA has also used surveys of private firms to gather descriptive statistics on the formal and informal private sectors and to understand entrepreneurs' perceptions of institutional and policy bottlenecks, training needs, and business opportunities.

In support of private sector development, JAA has designed and implemented programs to facilitate regional assessments and strategies, conducted many comprehensive seminars to stimulate and support national involvement in private sector development, and facilitated dialogue between government officials and private sector representatives.

JAA's PSD implementation approaches include proven and innovative activities directed to all levels of business. These activities include:

- Business Development Services (BDS) - JAA works with private providers, associations, NGOs and other organizations that directly serve the business sector, helping them to develop more effective and market/demand based modes of service provision, to provide more comprehensive management training programs, and to enhance their ability to act as a mechanism for dialogue within and on behalf of the business sector/industry.
- Small and Medium Enterprises (SMEs) - JAA encourages the removal of market, information and administrative constraints on SMEs as an important step toward priming the economic environment for expansion. However, JAA recognizes that removing constraints is not enough to spur growth; SMEs require access to a range of skills and financial resources to grow quickly and sustainably.

JAA's PSD activities are very closely tied to the JAA competitiveness approach. Many of the same tools and practices used in competitiveness projects are adjusted to PSD project contexts in terms of strategy development, economic analyses, diagnostic studies, benchmarking, business development services, small and medium sized enterprise development, training, etc.

JAA holds subcontracts on the USAID GBTI and Economic Policy IQCs with Nathan Associates, on the USAID AMAP Business Development Services IQC through DAI, and on the USAID AMAP Enabling Environment IQC with MSI.

Listed below are examples of ongoing and completed projects:

Economic Recovery, Reform and Sustained Growth in Iraq USAID

Using the JAA Competitiveness and Manual for Action in the Private Sector (MAPS) Approaches tailored to the unique context of Iraq, JAA has been selected to lead the private

sector development/competitiveness component of the USAID-funded Economic Recovery, Reform and Sustained Growth in Iraq project, through a subcontract with BearingPoint. JAA will carry out MAPS assessment and implement a modified Competitiveness Initiative. These actions will build an information base for policy development and project monitoring; establish an Iraqi competitiveness council; identify and engage 4 to 5 industry clusters for targeting technical assistance; and build public understanding and support for a sustainable competitiveness program in Iraq.

JAA will build an information base for policy and program development and monitoring by implementing baseline studies, benchmarking the commercial environment in Iraq vis-à-vis other Middle Eastern countries, training Iraqi staff to carry on information gathering and foster constant and relevant information flows between the private sector and public policy makers. In establishing a competitiveness council, JAA will provide an inclusive mechanism to promote public-private dialogue and present a mechanism for prioritizing the key challenges facing the business environment and the development of small and medium sized enterprises (SME) in Iraq.

JAA will identify 4 to 5 clusters to assist in competitiveness growth, as part of facilitated regional/national competitiveness initiatives. The activities of the initiatives will include developing high impact industry strategies, providing technical assistance in the implementation of these strategies, fostering market linkages, upgrading technological innovations and facilitating joint investments, foreign direct investment (FDI) and SME development. Throughout the course of this assignment, JAA will be working to compile recent and relevant economic and financial information for each cluster engaged in the project; monitoring changes in these indicators, conducting regular workshops for industry groups and business leaders, and providing opportunities for the media to be involved in the process of engaging the public in the development of a competitive Iraq.

The expected results of this project are the development of regional or national level industry specific strategies, implementation of strategic initiatives developed by the clusters, provision of targeted technical assistance for key industry strategies, development of SMEs in Iraq, development of an inclusive competitiveness council including public, private and academic leaders, and increasing foreign investment in Iraq. All of these factors will contribute to the development of a competitive Iraq.

Uganda: Support Private Enterprise Expansion and Development (SPEED) Project USAID

JAA is leading the Business Development Services component of the SPEED Project, with focus on SME growth and the development of business support organizations. To a large degree, these services are particularly directed towards businesses in the cotton, coffee, dairy, fish processing, and packaging sectors. JAA conducted needs assessments of several other business sectors (e.g. hides & skins, fish farming, apparel) and of several business associations. The program has successfully developed and implemented several innovative, self-supporting systems for delivering business development services, including service-focused associations, and promotion of effective, private business service organizations.

For the fish-processing sector, JAA provided assistance in developing a web portal for marketing (<http://www.lakevictoriafish.com>). This facility is designed to assist Uganda's fish exporters to better access international markets. JAA also worked closely with the Uganda Fish Processors and Exporters Association on strategy issues, to assist specifically in enabling its members to achieve ISO compliance, and to develop linkages between the fishing industry and the packaging industry.

JAA assisted the Government of Uganda (GoU) to plan the merger of the Uganda Export Promotion Board, the Uganda Investment Authority and the Uganda Tourist Board. The work

was carried out under the Medium Term Competitiveness Strategy (MTCS), and is intended to create a new organization focused on providing priority, effective services to business.

JAA is also working extensively with the Private Sector Foundation-Uganda (PSFU), an apex business association entirely in the private domain. JAA has assisted PSFU to develop and begin to implement its strategic plan, and to offer effective services to its membership. JAA is also assisting the PSFU to jump-start a process leading to the creation of a national competitiveness council (or similar organization).

Namibia: Review of the Small and Medium Enterprise Competitiveness Enhancement Project (SMECEP) USAID

The purpose of this assignment was to provide a comprehensive review of the USAID-funded Small and Medium Enterprise Competitiveness Enhancement Program (SMECEP) in Namibia, in order to assess the performance of the contractor against the Statement of Work to date, report on progress made with accomplishment of results specified in the contract, and to highlight the impact of the SMECEP program on beneficiary Small and Medium Enterprises (SMEs) and Business Service Organizations (BSOs). JAA identified best practices and lessons learned from the implementation of the project; developed materials for reporting purposes; conducted a review of the changes in SMEs and business service organizations (BSOs) since receiving assistance; and made recommendations to USAID and the Ministry of Trade and Investment (MTI) regarding Phase II of the project.

The JAA team evaluated critical questions on the outputs and results achieved; the impact of SMECEP programs on assisted SMEs; the level of organizational change in assisted BSOs; the impact of the grants program; the level of client satisfaction with SMECEP programs; the effectiveness of SMECEP coordination with other Strategic Objective implementing partners; and the impact of external factors such as USAID management and oversight and the roles of MTI and the Ministry of Higher Education, Training and Employment Creation (MHETEC) in the performance of the project.

Uganda, Togo, South Africa, Ghana, Southern Africa Regional, Rwanda, Zimbabwe, Lesotho, Senegal, Ivory Coast, Tanzania, Niger, Swaziland, Kenya, Guinea, Sri Lanka, Dominican Republic, and Costa Rica: Manual for Action in the Private Sector (MAPS) USAID

Under the Private Enterprise Development Support (PEDS) project, JAA created the Manual for Action in the Private Sector (MAPS) methodology. MAPS exercises have been carried out in over 15 countries. A full MAPS exercise involves the collection of data utilizing surveys of firms, government and non-governmental organizations. The Surveys typically involve sampling and extensive interviewing, data processing and interpretation of the results. MAPS exercises result in a comprehensive strategy for developing the USAID program in the private sector of the host country. The MAPS approach clearly exposes the major constraints to rapid, sustained and equitable economic growth; and identifies the sectors with the most potential for sustained growth and suggests policy, institutional and technical areas for USAID intervention. It provides benchmark development indicators that are then used to measure progress.

Through rigorous application of the MAPS methodology, JAA facilitated dialogue and consensus building regarding critical SMME and other private sector bottlenecks. This, in turn, led to clearly elaborated strategic objectives, realistic interventions, and quantified targets and benchmark for improved private sector performance.

Guyana: Economic Growth Strategic Objective Planning and Design

USAID

JAA assisted USAID/Guyana to prepare its long-term Strategic Plan for Guyana's Economic Growth Program (2004-2008). The Strategic Plan is focused on trade capacity building, with emphasis on enabling Guyana business to dramatically improve its ability to produce and export competitiveness products, with increasing value added. This in turn requires improvements in Guyana's ability to improve business' skills, awareness of global market requirements and abilities to respond to the market's needs; provide a sound service/enabling environment; attract productive investment; improve environmental stewardship; and benefit from regional and international trade agreements.

The design of the Strategic Plan was based on very extensive interviews and consultations with businesses, Government of Guyana (GoG) agencies, international development partners and others; experience of business-focused programs in Guyana in recent years; a recent review of the analytical update of the economic/trade situation and other inputs.

The project team provided a draft long-term Strategic Objective Plan that includes: a) results to be achieved; b) the logic of the causal relationships; c) assumptions to be monitored; d) illustrative approaches and activities; e) potential program synergies; f) performance management plan and, g) two SO budgetary scenarios.

Africa Private Sector Support Project (PSSP)

USAID

Through a multi-year task order contract, JAA provided leadership on issues related to private sector development in Africa, supported the development and implementation of USAID country strategies, and developed and tested new tools and approaches to apply to programs supporting business-led economic growth. JAA carried out more than twenty assignments under this Project, as subcontractor to Harvey and Company.

JAA services supported the development and expansion of Africa's private sector included assignments focused on policy, training, legal and regulatory reform, and institutional development. Amongst other assignments, JAA provided advisory services to the Senegal National Assembly to strengthen the economic reform process and private sector development; furnished technical assistance to the Uganda Capital Markets Authority for the start-up of the Uganda Stock Exchange; analyzed constraints to private sector growth throughout sub-Saharan Africa; conducted feasibility studies to establish multi-branch community banks in selected sub-Saharan countries; prepared business guides for foreign investors in Cote d'Ivoire and Congo; and supported the development and implementation of the Zimbabwe Progress Fund to support private entrepreneurs. Across Africa, JAA developed and tested analytical tools (Growth with Equity Matrix, Comparative Policy Analysis, Competitiveness Analysis) for private sector analysis and program development and provided analytical and design support to venture capital programs.

Haiti FORUM 2000 Project

USAID

JAA provided support to Centre pour la Libre Entreprise et la Démocratie (CLED), an association of businesspeople focused on improving the economic environment, to assist Haitians to address issues related to economic growth and developing the policy agenda to improve the investment climate. JAA assisted CLED to organize and conduct 6 major economic conferences, prepare several position papers and related seminars on major economic and political issues, and organize and conduct 2 seminars for the Haitian media.

JAA also worked with CLED to organize and carry out a National Competitiveness Conference. The 2-day conference covered many issues related to competitiveness and

included focus on two industry sectors (agribusiness and tourism). The keynote speakers included former Presidents Fernandez of the Dominican Republic and Figueres of Costa Rica (currently managing Director of the World Economic Forum).

This project brought issues of competitiveness to the forefront of economic development discussions relating to Haiti and led to a white paper coordinated by CLED on economic development issues in Haiti.

Assistance to Inversiones Consolidadas de Honduras, S.A. de C.V (The INCONHSA Group)

Inversiones Consolidadas de Honduras, S.A. de C.V (The INCONHSA Group)

The INCONHSA Group, based in Honduras, is one of the largest Central American business groups. JAA carried out a series of assignments, providing advice and assistance initially to improve The INCONHSA's internal organizational and management structures. JAA provided technical assistance and guidance to improve productivity and devolve responsibility to motivated teams; to focus on people and customers; to evaluate business opportunities; and to developing focused business plans. JAA the assisted INCONHSA to developed international marketing plans, and to consider a regional investment strategy, including linkages with other regional investors.

South Africa: Private Enterprise Development Support (PEDS) III USAID and Overseas Private Investment Corporation (OPIC)

In the SADC Region, JAA helped USAID's Regional Center for Southern Africa (RCSA) develop a private sector strategy. In Uganda, we helped develop a stock exchange and in Southern Africa we served as liaison with OPIC to encourage trade and investment. JAA also analyzed private sector development in sub-Saharan Africa; prepared business case studies and training through evaluation of private enterprises in Cote d'Ivoire, Ghana, Uganda, and Zimbabwe; and provided development support to the business sectors of Zimbabwe and Mozambique.

Dominican Republic: Economic Policies and Practices Project USAID

JAA led a team in conducting a mid-term evaluation of the USAID-funded Economic Policies and Practices Project in the Dominican Republic. The project provided funding for private foundations to carry out studies of various aspects of the economy with a view to recommending and advocating policy reforms to government. The JAA team followed the USAID Project Evaluation Guidelines and used the Project Logical Framework to measure progress against targets and to test project assumptions.

Ghana: Enterprise Support Services for Africa (ESSA) World Bank—International Finance Corporation (IFC) and the Canadian International Development Agency (CIDA)

The project provided management training and consulting services to small and medium businesses on a fee basis. JAA prepared the final design for the ESSA pilot project with funding from the International Finance Corporation (IFC). The pilot project implementation will be financed by the Canadian International Development Agency (CIDA), and will be implemented in Ghana. The project is designed to provide management training and consulting services to small and medium businesses on a fee basis. If the pilot project is successful the IFC and CIDA have plans to expand the program in Africa.

Haiti: Private Sector Assessment and Strategy Development USAID

JAA assisted USAID to prepare its private sector assistance strategy and provided recommendations for assisting private enterprise growth in Haiti. Activities included analysis of constraints and opportunities for private enterprise development; competitiveness analysis of specific industry and sub-industry sectors (light manufacturing/assembly, handicrafts, tourism, finance, agro-industry, construction); evaluation of policy, finance and regulatory frameworks; assessment of public-private dialogue and joint planning; and analysis of the prospects for free trade zone development and foreign investment promotion; and linkages between secondary cities and rural and small urban areas. The analysis included extensive review of domestic and international transport infrastructure and transport services, financial issues pertaining to transport, and private sector investment in transport infrastructure and privatized services.

United National Development Programme (UNDP) Private Sector Guidebook United Nations Development Programme (UNDP)

JAA developed the UNDP Private Sector Guide, which was put into the hands of over 50 Resident Representatives and Private Sector Development Officers in Africa at the UNDP annual meeting. Objectives of the Guide were to assist Country Offices in establishing dialogue and working relations with the local and international private sector, to mobilize financial resources from the private sector for development programs, and to provide a checklist on how to strengthen alliances with the private sector. To these ends, the Private sector Guide laid out a 6-step process for UNDP country programs that provided an outline of specific interventions to guide private enterprise development efforts: 1) define current national strategy and assess its effectiveness; 2) “map” the local private sector; 3) diagnose the most critical constraints to private sector growth; 4) promote dialogue with the business community through focus groups and other methods; 5) create the action agenda in cooperation with local government, donors and other stakeholders; and 6) implement the action agenda. The Private Sector Guide served as a reference tool to help Resident Representatives follow this process and achieve private sector development goals.

Workshop for Private Enterprise Development USAID and United Nations Development Programme (UNDP)

JAA assisted UNDP and USAID to prepare and conduct a 4-day workshop, held in Abidjan, bringing together 60 UNDP and USAID Private Sector Development Officers, as well as persons from the World Bank, AMSCO, APDF, West African Enterprise Network, African Business Roundtable and other organizations. A focal point of the workshop was the application of the Private Sector Guide and commitment to pilot implementation in several countries. JAA also prepared 2 case studies on UNDP Private Enterprise Programs, and 6 case studies on African enterprises (in 4 countries) which were clients of the African Project Development Facility (APDF) and African management Services Company (AMSCO). The cases examined issues of business strategy and operations. JAA also prepared a review of state-of-the-art research and thinking about the role of private enterprise in economic growth in Africa. JAA led 4 sessions of the workshop.

Design and Implementation Programs to Foster Economic Growth through Private Enterprise

United Nations Development Programme (UNDP)

Following the development and acceptance of a process, developed by JAA and the UNDP, for UNDP support to private sector growth in Africa, JAA carried out a year-long program of pilot implementation and testing, and then dissemination of the approaches and techniques. Worked with UNDP Country Offices, business leaders and specialists from Governments to design and

implement pilot private sector programs in Zimbabwe, Nigeria, Mali, Malawi, Kenya, Ghana, Cameroon and Botswana. An Africa-wide workshop will be held in 1998 to examine the pilot programs and to widen the application of the private sector development process.

Trinidad & Tobago: Developing Competitive Agribusiness InterAmerican Development Bank (IDB)

JAA developed the ASSETS Model (Agribusiness Services to Support Economic Transitions) to help speed the transition from traditional and protected agriculture to competitive agribusiness systems. The model can be used to enable traditional producers to break into non-traditional markets with new products. The model was developed in the course of a series of sectoral strategy and structural adjustment assignments for the InterAmerican Development Bank in Trinidad & Tobago. The model can serve as a component of loan packages or potential grants from the Multilateral Investment Fund (MIF).

JAA also assisted with the preparation of an action plan and revaluation of sector policy for the Government of Trinidad and Tobago. JAA then finalized Action Plans for the program components in the following areas: trade and price policy; land and water use, state owned enterprise reform, public sector administration, and social impact mitigation.

Trinidad and Tobago: Preparation of the Agriculture Sector Reform Program InterAmerican Development Bank (IDB)

Assisted the InterAmerican Development Bank in preparing the structural adjustment loan—that component which dealt with assisting private sector associations to help members become competitive. JAA also assisted with final preparation of Terms of Reference for Implementation of Technical Cooperation Program in Trinidad and Tobago.

Assessment of Regional Private Sector Development and Regional Business Linkages— South African Region USAID

Using the Manual for Action in the Private Sector (MAPS) methodology, JAA assisted the USAID Regional Center for Southern Africa (RCSA) in developing strategic approaches to private sector growth, competitiveness and integration as an early step in designing new private sector activities for the region. This was a major effort involving 10 southern African and 5 international consultants covering 11 countries of the region. The study identified the leading constraints to private sector growth, examined which of those could be addressed through a regional strategy, and recommended various donor interventions.

Manual for Action in the Private Sector (MAPS)—Republic of South Africa USAID

JAA also used the MAPS methodology to help USAID South Africa develop its strategy for private enterprise development in ways to include and empower the black majority population. JAA also developed benchmark data and black employment business ownership and assist ownership.

Business Plan Evaluation Workshops/OECD Training in Eastern Europe and the former Soviet Union (NIS and CIS countries)

Organization for Economic Cooperation and Development (OECD)

JAA developed and conducted eight OECD training seminars in Eastern Europe and the former Soviet Union. Five focused on the evaluation of bids for enterprises to be privatized (with some discussion of post-privatization issues), two concentrated on SME development, and one addressed development of local credit sources for privatization transactions.

South Africa: Private Sector Development

USAID

JAA provided assistance to USAID/South Africa's private sector development program prior to the election of Nelson Mandela, to prepare a post-election assistance strategy.

South Africa: Empowering Black South Africa in a Post-Apartheid Era

USAID

JAA conducted an overview of Black South Africa's Financial Sector and assisted the USAID Mission in promoting private enterprise. In the course of this, JAA conducted a study evaluating all the critical components affecting the flow of capital to black-owned businesses in the country. Additionally, JAA assisted in the identification of key players to form a network of stakeholders in the Black South African Financial Sector and provided guidance on the implementation of an on-going dialogue with key stakeholders.

Zimbabwe: Zimbabwe Progress Fund Project

USAID and Harvey & Company

JAA developed an implementation plan for the Zimbabwe Progress Fund's first year of operations. JAA also identified the first transaction for the Zimbabwe Progress Fund and facilitated its eventual closing, and explored the most appropriate ways that ZPF could cooperate with the Southern African Enterprise Development Fund.

Dominican Republic, Agroindustry Management and Marketing

ISA

JAA conducted many seminars for businesspeople and students in agro-industry management and marketing, leading the agricultural management program at the primary agricultural university in the Dominican Republic. JAA institutionalized the management school of ISA, training faculty, supervising case studies, implementing curricula, and developing policy initiatives. Our institutional training included three modules of a course in agro-industrial project management and courses in agro-industrial systems analysis, marketing, and strategy formulation and implementation. Our policy analysis and reform work included conceiving, organizing, and executing briefings for political leaders. JAA assisted ISA in winning bids for self-financing outcomes.

Rwanda: Economic Recovery Credit

World Bank

JAA provided the services of a Privatization and Private Sector Development Specialist to The World Bank, as the sole external member of a 4-person World Bank team carrying out a preappraisal for a new economic recovery credit. The specialist evaluated and made recommendations regarding ongoing programs for privatization of state-owned industry, and reorganization and development of the environment for private enterprise. Particular focus also included restructuring of the Chamber of Commerce and Industry, development of sectoral and other business associations, creation of the Rwandan Investment Agency, a comprehensive legislative program, the impact of tariff and other changes on business, restructuring (privatization, market liberalization) of the tea and coffee industries, and liberalization and enterprise development in the agricultural sector.

Argentina: Corruption Abatement Policies

Argentine Senate

Under a contract with the Argentine Senate, and in collaboration with the Harvard University Kennedy School of Government, JAA designed and implemented a series of workshops for top politicians and policy makers on the topic of corruption abatement policies. In the course of

designing these workshops, JAA developed case studies of experiences in other countries facing numerous types of corruption. Ultimately, these workshops were aimed at developing skills in the analysis of sources of corruption and mechanisms for addressing these.

**Argentina: Public Administration Improvement
Instituto Nacional de Administracion Publica (INAP)**

JAA assisted the Instituto Nacional de Administracion Publica (INAP) faculty and staff in developing their research and training capabilities as part of a countrywide program to improve the efficiency of the Argentine civil service. Among other activities, JAA trained INAP faculty in the development and use of the case study methodology for management education.

**Egypt: Workforce Development Strategy
USAID**

In partnership with PriceWaterhouse Coopers and the Stanford Research Institute, JAA conducted a workforce development exercise in Egypt focusing on agribusiness, tourism, and information technology (IT). Based on the results of a workshop carried out in December 2002 and on USAID's identification of IT as cluster for focus, JAA facilitated a dialogue between private sector tourism executives and education and training providers to forge better links between the private sector and the training providers; and also provided assistance to the strengthening of IT and IT-related services workforce development programs.

**Republic of South Africa: Development of Workforce Competitiveness
USAID**

JAA, as the technical lead in collaboration with Nathan Associates, Inc., developed strategic objectives related to workforce development, private sector development, and democracy and governance in the Republic of South Africa. Building on prior projects in South Africa on education and workforce development, the purpose of this study was two-fold. First, it reviewed international approaches to monitoring and evaluating training systems in a range of industrialized and developing countries with a view to deriving lessons for South Africa. Second, the study provided the South African Department of Labor (DoL) with recommendations about how to conduct impact studies of the National Skills Development Strategy (NSDS) in the medium and long terms. In particular, this aspect of the study focused on the implications of the DoL undertaking social cost-benefit analyses of the NSDS.

Training and Workforce Development

Training and skills transfer are integral to virtually all of J.E. Austin Associates, Inc. (JAA) work. JAA has trained the staff of private companies, state-owned companies, business associations, and NGOs, as well as the staff of governments and major multilateral and bilateral institutions. JAA has conducted specialized executive training seminars for private associations and firms, and has also served as an advisor to several associations seeking to strengthen management and organizational skills.

Throughout the world, JAA has assisted business schools and management programs of developing countries by developing curricula, training teachers, and preparing and supervising case study development.

Some of the main areas of focus for JAA's training activities include business strategy; privatization; international executive training; case study and management education; public administration; agribusiness management; infrastructure and related services management; finance and banking; and small, medium and microenterprise.

JAA provides training in major corporate functions: governance, strategy, marketing, production, finance, control, human resources and informatics. JAA has developed specialized courses for training the staff of major multilateral and bilateral institutions, such as the World Bank, International Finance Corporation, UNDP, IDB and USAID. JAA uses highly interactive and participatory training approaches including multimedia, case studies and dynamic moderators. JAA can also capture training events in digital form for CD-ROM and web-based distribution using "just-in-time learning" technologies.

Listed below are examples of ongoing and completed projects:

Non-Fiscal Incentives to Investment within the East Africa Community (EAC)

World Bank—Foreign Investment Advisory Service (FIAS)

The EAC has, as part of its current 5-year work program, three programs for "harmonizing" trade, tax and investment. FIAS/WB is working with the IMF on the investment "harmonization" issues, with the IMF looking at fiscal incentives (chiefly corporate tax breaks and holidays, and tax/customs administration systems) and FIAS/WB looking at non-fiscal incentives to capital and labor.

JAA is supported this initiative by providing the services of a specialist in workforce and labor issues. JAA looked at the labor-related incentives (and disincentives) provided by Kenya, Uganda and Tanzania. JAA carried out a comparative analysis of the incentives and disincentives available to investors as they relate to workforce and labor issues, and as they impact such issues. The analysis included comparison with international best practices, identification of areas where "harmonization" is necessary or desirable between the three countries. JAA provided recommendations for a "harmonization" program, with a roadmap for converting specific recommendations into practical steps that can be pursued at a regional and/or national level.

Sri Lanka Competitiveness Initiative—Workforce Development: Design and Development of an Internship Program

USAID

Many clusters working with the Sri Lanka Competitiveness Initiative have identified workforce development as a crucial issue that needs attention. As the first step towards a concerted

approach to developing the workforce, it is proposed that a private sector led Competitiveness Internship Program be developed for selected industries, in partnership with the public sector. Under the Sri Lanka Competitiveness Initiative project, JAA is assisting in design and development of an internship program. JAA is reviewing previous workforce development and skills development reports/studies done in Sri Lanka thus far; and is conducting discussion sessions with public and private sector leaders to obtain a better understanding of workforce development issues with emphasis on on-ongoing internship programs. JAA is also identifying barriers and recommendations for ways to overcome them; and identifying mechanisms to increase employability through structured and well-managed internship programs both from employers and individuals through the development of a market-based, demand-led system. This will result in JAA designing an internship program that better meets the needs of industry and skills of the workforce.

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Cambodia: Assisting the Faculty of Business of the University of Phnom Penh

USAID

To strengthen the Faculty of Business of the University of Phnom Penh, Cambodia, JAA helped organize a private and public sector board of advisers, reviewed curriculum, developed a strategic plan, and worked with the faculty and dean on issues such as financial self-sufficiency, strategic vision, and curriculum. JAA analyzed the economic structure of Cambodia, the recent and projected trends for foreign investment, and labor force projections, and assessed the implications of these for the business training programs and demand for graduates of the Faculty of Business. A key element of the planning was involvement of the private sector and use of a market-driven approach, based on the needs of private business.

Uruguay: Case Study Training

Federacion Uruguayo de Centros Regionales de Experimentacion Agricola

JAA provided a course on the case study method for 25 agribusiness consultants serving a nationwide network of leading farmers in Uruguay. The JAA seminar included instruction on the

use of the case study method and the process of preparing a case study. JAA reviewed the current and future use of case studies in client programs.

**Senegal: Training and Advisory Services to the National Assembly
USAID**

JAA provided advisory services to the Senegal National Assembly on the economic reform process. The focus of the services was the strengthening of public/private sector policy reform through training of National assembly members. A workshop was implemented focusing on policy, legislative and regulatory reform to improve the business environment. Development of a productive public-private dialogue was also a main component of the assignment.

**Management Development Institute in Bangladesh
BEXIMCO Group**

JAA assisted in the establishment of a business education program within a major Bangladeshi conglomerate. JAA identified and fielded short-term consultants, and identified long-term consultants; developed daily plans for a ten-course, university-level business curriculum; identified useful instructional materials and qualified faculty candidates; established criteria and procedures for participant selection and post-program evaluation; conducted management lectures; assisted in the formation and training of a case study writing team; and advised on general administrative procedures.

**Russia: Corporate Governance
Private Client**

JAA designed and implemented a course on corporate governance and shareholder relations for joint stock company managers in Russia.

**Poland and Czech Republic: Development of Privatization Case Studies
USAID**

JAA collaborated with the International Privatization Group at Price Waterhouse under a USAID-funded project to train local trainers in the research, development and teaching of case studies on this topic. The case studies are being used to train local government officials in Poland and the Czech Republic on the formulation and implementation of privatization transactions. JAA has also developed a program to teach state-owned enterprise managers and privatization officials in basic business skills.

**Instruction at Arthur D. Little Management Education Institute (MEI)
Arthur D. Little (ADL)**

JAA staff prepared and taught seminars in strategic planning, management in developing countries, and other specialized courses in this accredited Master's level management program for foreign nationals. Services provided included: case studies and other training materials preparation in strategic management, human resource management, and budgeting/resource management for a personnel training course for the Asian Development Bank, a management training course, and the teaching of two training modules as part of MEI staff. Module 1 covered negotiating the sale of Russian state-owned enterprises. Module 2 covered privatization in Eastern Europe.

**International Finance Corporation and World Bank Staff Training Worldwide
World Bank—International Finance Corporation (IFC)**

JAA has been involved in a long-term process of consolidating experiences in institutional analysis from the World Bank in order to develop training materials in this area for Bank officers.

JAA also prepared four case studies and conducted training sessions in project analysis and management for IFC and World Bank staff.

Peru, Pakistan: Management Institute Strengthening Private Clients

JAA consultants trained faculty at the Escuela de Administración de Negocios para Graduados (ESAN), a leading Peruvian institutes of management, in the use and preparation of case studies as a tool for the development of management skills. JAA also provided similar training for faculty at the Lahore Business School in Pakistan.

Argentina: Regional Consortium of Agricultural Experimentation (AACREA) Training Regional Consortium of Agricultural Experimentation (AACREA)

JAA provided training to professionals of AACREA, an Argentine agribusiness association, in the case method and the agribusiness system approach.

Argentina: Corruption Abatement Policies Argentine Senate

Under a contract with the Argentine Senate, and in collaboration with the Harvard University Kennedy School of Government, JAA designed and implemented a series of workshops for top politicians and policy makers on the topic of corruption abatement policies. In the course of designing these workshops, the firm developed case studies of experiences in other countries facing numerous types of corruption. Ultimately, these workshops are aimed at developing skills in the analysis of sources of corruption and mechanisms for addressing these.

Argentina: Public Administration Improvement. Instituto Nacional de Administracion Publica (INAP)

JAA assisted the Instituto Nacional de Administracion Publica (INAP) faculty and staff in developing their research and training capabilities as part of a countrywide program to improve the efficiency of the Argentine civil service. Among other activities, JAA is training INAP faculty in the development and use of the case study methodology for management education.

Dominican Republic: Agroindustry Management and Marketing ISA

JAA conducted many seminars for businesspeople and students in agro-industry management and marketing, leading the agricultural management program at the primary agricultural university in the Dominican Republic. JAA institutionalized the management school of ISA, training faculty, supervising case studies, implementing curricula, and developing policy initiatives. JAA's institutional training included three modules of a course in agro-industrial project management and courses in agro-industrial systems analysis, marketing, and strategy formulation and implementation. Analysis and reform work included conceiving, organizing, and executing briefings for political leaders. JAA assisted ISA in winning bids for self-financing outcomes.

Latin America & the Caribbean: Micro-Finance Training InterAmerican Development Bank (IDB)

JAA conducted a survey of "best practices" and "lessons learned" in micro-enterprise finance for the InterAmerican Development Bank (IDB), prepared a final report, and advised the IDB on future strategies to promote micro-finance institutions in the Latin America & Caribbean region. JAA will prepare and deliver IDB-sponsored training seminars on micro-finance in several countries of the region, including Ecuador, Jamaica and Mexico. In addition, JAA prepared a case study on FinanSol in El Salvador, a micro-enterprise lending institution that receives

support from the IDB. The case study will be used to train IDB program managers in evaluating the viability, effectiveness and sustainability of micro-finance institutions.

**Russia: ICM Textiles
European Union and ICM**

JAA provided training for chief executives from 30 leading textile companies in Russia, under funding from the European Union and in conjunction with ICM - Paris. The executives were from recently privatized firms. JAA prepared and presented two five day seminars on "The Product Development Cycle and Marketing Management" in Moscow. Topics discussed included competitiveness, export strategies, cost control, maintenance of quality, etc. A particular focus was aligning production to the private development life cycle in the fashion industry. JAA developed case studies tailored to the current situation of the Russian textile and clothing companies.

**United States/Dominican Republic: Joint Agricultural Consultative Committee
(JACC) Training**

Joint Agricultural Consultative Committee (JACC)

JAA brought 12 members of the Board of Directors and the Executive Director of a leading Dominican agribusiness association to the United States for a training visit, including meetings with U.S. associations involved in the Cooperators Program, members of Congressional committees, and the White House Agricultural Advisor.

**Asian Institute of Management (AIM) Training
Asian Institute of Management (AIM)**

Dr. Austin provided training on for the Asian Institute of Management (AIM), a business school that serves East Asia. The school was started with technical assistance from the Harvard Business School.

**People's Republic of China: Case Study and Agribusiness Systems Training
World Bank**

JAA helped train Chinese leaders from the Agricultural Bank of China, Ministry of Agriculture and the Northeast Forestry University in the case study method and agribusiness systems approach. The workshop represented the first phase of a long-range program that called for these leaders to return to China to train trainers from the five main national agricultural institutions in agricultural policy, project analysis and management. The project included a focus on creating local capability.

**Institutional Study of the Botswana Road Training Centre
Government of Botswana (GoB)**

JAA carried out a study of the role and capacities of the Road Training Centre (RTC) in Botswana, and the feasibility of future institutional alternatives and business strategies. Examined alternatives for partial and complete privatization, transfer to other educational institutions, etc. in the context of projected industry demand for training services. Examined the RTC's markets and services to be offered. Recommended organizational, financial, facilities and human resources requirements. Developed a strategic plan and business plan for the RTC.

Microenterprise Development

Microenterprise is an integral component of a healthy and growing economy, and an important sector for employment and for poverty reduction. Moreover, the significant rates at which microenterprises can grow make them an ideal launching point for various business initiatives. J.E. Austin Associates, Inc. (JAA) has made microenterprise a key element of its capacities with respect to enterprise and private sector development.

Lack of knowledge, skills, market access and financial resources often hold microenterprises back from fulfilling their potential. JAA has a superb track record of helping microenterprise and support organization to provide access to resources and remove barriers. JAA's unique capabilities with respect to credit reference services include components specifically focused on microenterprise.

JAA holds subcontracts on three AMAP Microenterprise IQCs – Business Development Services and Microfinance through DAI and Enabling Environment through MSI.

Listed below are examples of ongoing and completed projects:

Establishment of a Credit Reference Service in Uganda European Union/Support to Feasible Financial Institutions and Capacity-Building Efforts (SUFFICE) Programme

With the objective of refining the strategy and activities proposed for the establishment of a Credit Reference Service (CRS) for the microfinance industry in Uganda, JAA conducted a market analysis and review of the legal and institutional framework; analyzed identified constraints for the establishment of a CRS and recommended feasible solutions; and conducted an appraisal of the two competing project proposals that requested donor support.

Bank Secrecy Laws and Credit Bureau Formation USAID

Bank secrecy laws have the purpose of protecting the information of financial services clients. They are designed to reassure consumers that information gained through financial transactions will not be used for other purposes. At the same time, these laws benefit large, established financial institutions that enjoy an information advantage over potential rivals. This AMAP project aims to foster modernization in bank secrecy laws as a means to enabling the environment for credit information services, thereby reducing the risks of lending and opening opportunities for microenterprises to access credit. This study will be limited to the review of three countries' (Ecuador, Perú and Croatia) experiences in reforming bank secrecy laws to promote the flow of credit information.

A team of JAA consultants will focus on 4 primary objectives in completing case studies on Ecuador, Perú and Croatia. These objectives are: increasing awareness and understanding on the importance of bank secrecy law reform and credit information flow; describing bank secrecy regulation reforms in selected countries with background information on how the regulations were developed, who was involved in the effort to develop them, what political support(s) were necessary for passage of the laws and lessons learned from the process that would have obtained a better result; developing guidelines for donors and practitioners to engage effectively in the process of modernizing bank secrecy laws; and outlining successful strategies for consensus building and policy reform.

Developing Private Credit Bureaus to Serve a Microfinance Institution's (MFI) Client Base USAID

Credit bureaus can greatly assist in increasing the breadth and depth of MFI outreach by removing or decreasing some of the risks inherent in lending, improving management practices, and reducing barriers to entry to other credit suppliers. The challenge faced by international donors has been developing a model for private credit bureaus that can service MFIs, be financially viable, and serve a wide number of other creditors as well. The purpose of this project under the AMAP IQC is to examine three credit reporting systems that have allowed the emergence of credit bureaus serving MFIs, focusing on characteristics for successful inclusion of MFIs into credit bureau systems; to document lessons learned in these experiences; to develop guidelines and approaches to support the development of private credit bureaus by donor intervention to serve MFI client bases; and to generate a consensus among donors and practitioners on a best practice approach to supporting/developing private, financially-viable credit bureaus.

The JAA consultant team will examine and analyze in detail at least one initiative fitting one of the three broad models: a universal credit bureau serving MFIs; such as the credit bureaus in the Dominican Republic; a MFI-specialized credit bureau, such as the ones functioning in South Africa and in El Salvador; and a universal credit bureau serving MFIs through subsidized credit repots, such as the USAID sponsored INFOCORP-COPEME program in Peru. The team will analyze each experience in light of previously acquired knowledge on the topic, international "best practice" in developing these institutions, and comparing the experiences to each other. Additionally, the team will make an attempt to measure the relative success of serving MFIs of each initiative by researching quantitative and qualitative indicators that can facilitate the comparison among the models and cases.

Nicaragua: Microenterprise Lending/ Technical Assistance InterAmerican Development Bank (IDB)

JAA conducted a mid-term institutional evaluation of the Instituto Programa Nacional de Apoyo a la Microempresa (PAMIC) Project, which is funded by the IDB and the Government of the Netherlands. PAMIC focuses its work on 10 credit unions, 8 NGOs, 5 agricultural cooperatives, and 2 financial intermediaries. Two credit unions were examined in detail using the standard classification. JAA trained PAMIC staff in methodology and data collection adjustments needed with NGOs so that managers will have ready access to information at PAMIC and for use in future project evaluations.

Microenterprise Training Workshops InterAmerican Development Bank

JAA provided a staff member to conduct Micro-finance Workshops in four Latin American and Caribbean (LAC) countries. JAA presented techniques, lessons learned and best practices for the sector, facilitated case studies of microfinance projects, moderated workshop group presentations. The purpose of these workshops was to help increase participants' awareness of microfinance financial and institutional issues.

Latin America & the Caribbean: Micro-Finance Training, Inter-American Development Bank

InterAmerican Development Bank (IDB)

JAA conducted a survey of "best practices" and "lessons learned" in micro-enterprise finance for the Inter-American Development Bank (IDB), prepared a final report, and advised the IDB on future strategies to promote micro-finance institutions in the Latin America & Caribbean region. JAA will prepare and deliver IDB-sponsored training seminars on micro-finance in several countries of the region, including Ecuador, Jamaica and Mexico. In addition, JAA prepared a

case study on FinanSol in El Salvador, a micro-enterprise lending institution that receives support from the IDB. The case study will be used to train IDB program managers in evaluating the viability, effectiveness and sustainability of micro-finance institutions.

**Dominican Republic: FondoMicro Evaluation
USAID**

JAA evaluated the FondoMicro Project (US\$ 7.25 million) in the Dominican Republic for USAID. JAA conducted a mid-term evaluation of a second-tier lending institution (FondoMicro) created by USAID to on-lend donor and commercial bank funds to NGOs operating microenterprise-lending programs. FondoMicro provides both financing and technical assistance through 6 NGO lenders to some 20,000 micro-enterprises in the Dominican Republic.

The specific tasks of this contract were to ascertain progress to date in meeting project objectives, evaluate the management effectiveness of FondoMicro, identify problem areas and constraints and recommend solutions. Key areas of analysis included planned versus actual target achieved to date, project effectiveness and relevance, benefit/cost of project, the sustainability after project termination, project impact on women and the strategic future of FondoMicro. This effort involved the design and implementation of a survey of 6 NGO FondoMicro clients and 6 NGO non-clients. The team also utilized the Project Logical Framework to assess progress toward targets and to test the assumptions.

**Annual Small Enterprise Management Workshops
USAID and Nathan Associates, Inc.**

JAA provided annual workshops for trainers and case writers in small-enterprise management under the USAID-funded ARIES Project. The JAA Chairman, Dr. Austin and CEO, Kevin Murphy trained microfinance professionals in workshops taking place at the Harvard University Kennedy School of Government. Professionals were trained in the case study method as applied to microfinance. Later, JAA provided editing and revision to case studies written under the project.

**Kenya, Tanzania and Uganda: Pride Africa
Pride Africa**

JAA provided technical assistance to Pride Africa's headquarters office in Nairobi, Kenya on the preparation of full feasibility studies for the establishment of multi-branch community banks in Tanzania and Uganda.

**Manual for Action in the Private Sector (MAPS)—Microenterprise Assessments
USAID**

JAA has conducted micro enterprise assessments as part of the Manual for Action in the Private Sector (MAPS) process and independently. MAPS represents one of JAA's key contributions to the field of economic development as it relates to the promotion of investment and the enabling environment for private enterprise. Developed by JAA at the request of the United States Agency for International Development, the results of these studies have been used to reorient foreign aid strategies and to develop new private sector assistance strategies for AID Missions. They have yielded comparative private sector development indicators which also facilitate evaluation and monitoring of foreign donor aid programs. Strategic audit, private sector constraints analysis, scientific surveys of 300-500 private firms, focus groups, policy analysis, strategy development and program/project design represent the specific capabilities of MAPS.

Infrastructure and Infrastructure-related Services

Infrastructure and related services play critical role in the economic success and social well being of an economy, and can be determinants of the ability of a business to select and implement sound strategies. The consequences of an undeveloped or mismanaged infrastructure within a country can be devastating—lack of national competitiveness, reduced inward investment, reduced economic growth and a deterioration in the quality of life for its citizens. J.E. Austin Associates, Inc. (JAA) works both at improving competitiveness *through* better infrastructure and infrastructure-based services, as well as *with* infrastructure and infrastructure-based services based upon their own competitiveness. JAA has been particularly responsible for improvements in the areas of transport and information/communications, including related workforce/skill development/education. JAA's cluster-based and public-private dialogue methodologies provide the private sector with the means to prioritize needed improvements, and to communicate these to public-sector decision makers and service providers.

Listed below are examples of ongoing and completed projects:

Southern Africa: Regional Highway Management Systems Study, SADC Region USAID

To assist USAID's Regional Center for Southern Africa, JAA carried out a study of issues and approaches to highway management in the southern Africa region. The study concentrated on institutional, legal, and financial structures; management systems; heavy vehicles weight management systems; mechanisms for cost recovery; and private sector involvement in highway management. Fieldwork was carried out in Botswana, Malawi, Mozambique, South Africa, Tanzania, Zambia, and Zimbabwe. Recommendations were made for strategic support to be provided by USAID, including several options for BOT and other public-private projects.

South Africa—Vision 2020 Program, Department of Transport, Republic of South Africa Government of South Africa/Federal Highway Administration

Through Apogee Research, JAA staff assisted the South African Department of Transport to develop a multi-year program for defining long-term strategy and implementation programs for the transport sector. Areas of priority included land freight and urban, rural and inter-urban passenger transport. Modal emphasis included road transport, rail, and intermodal interface with aviation and maritime transport. Other areas of emphasis included infrastructure management, institutional change, safety and regulation, privatization and public-private partnering, finance and cost recovery, technology and skills development, regional infrastructure and protocols.

Egypt: Strategy Development for Egyptian Information and Communication Technology Industry USAID

JAA conducted a strategy development exercise for USAID on its activities in the information and communication technology (ICT) sector. The study report, which examined the status of the Egyptian ICT industry, recommended actions to improve the competitiveness of Egypt in the global ICT market.

Botswana: Institutional and Financial Analysis of the Roads Sector Government of Botswana (GoB)

JAA helped conduct a comprehensive analysis of institutional and financial structures of the Botswana road sector. Areas of focus included making road service responsive to the needs of

Botswana businesses and other stakeholders, tying the road sector to requirements for national competitiveness, encouraging decentralized private–public decision-making, and maximizing private provision of services.

Road Concession Program for Sao Paulo State USTDA

With Apogee Research and a Brazilian partner, JAA assisted Sao Paulo State to attract foreign investment in 2500 kms of long-term highway concessions. JAA and its partners provided an independent review of the issues of concern to potential investors and operators, such as institutional and legal frameworks, tender procedures, review of feasibility studies, and risk analysis.

Bulgaria Competitiveness Exercise/Program (Bulgaria Policy Reform and Advocacy Strengthening Project)—Assistance to the Maritime Transport Cluster USAID

JAA implemented a particularly intensive competitiveness program as part of the Policy Reform and Advocacy Strengthening project. JAA helped to build stakeholder coalitions to promote competitiveness for Bulgaria, with particular emphasis on business strategy and improvement of the microeconomic environment for business.

As part of this project, JAA assisted provided strategic, cluster-building assistance to businesses centered on the port infrastructure and related services in Varna, on the Black Sea. JAA helped the industry participants to examine their market and strategies, to exchange information and opinion, and to formulate actions and collaborative initiatives to improve their sustainable competitiveness. To assist in this process, JAA prepared a case study of a top industry performer in Varna, and a PowerPoint presentation on the strategy of an innovative barge operator in Rousse.

The industry demonstrated sustainable interest and initiative in the process. JAA worked with Nathan Associates to provide the services of a world-class strategist and expert in ports, shipping and related industry, to assist stakeholders in a strategic assessment and planning exercise. JAA/Nathan assisted the industry stakeholders to consider current strategies, strategic opportunities, and strategic gaps by providing access to information and perspective about industry trends and structures, client requirements, markets and quality issues. The focus of interaction for the assignment was facilitative, interactive, and informative in assisting the industry to review its competitive positioning. Nathan/JAA prepared a report on industry/stakeholder groups met; main points of discussion; current strategies; main strategic issues and concerns facing the industry; and strategic options and opportunities.

Sri Lanka Competitiveness Exercise/Initiative—Feasibility of Establishing a Cruise Industry Hub USAID

JAA is leading a highly successful and influential Competitiveness Initiative in Sri Lanka. Through this Initiative, JAA facilitated the development and implementation of competitive strategies in 8 industry clusters: rubber, tourism, gems and jewelry, tea, ICT, ceramics, coir and spices. The program also fosters effective public-private dialogue; focused improvements in infrastructure, services and regulation; targeted investment promotion; and increased workforce competitiveness.

For the tourism cluster, JAA provided technical assistance to consider the requirements and potential, in terms of specialized infrastructure, technology, services, etc., for Sri Lanka to establish itself as cruise hub location in Southeast Asia for small luxury ships. In the course of this assignment, JAA consultants performed a market analysis of and prospects for the South Asian cruise market and a benchmarking study of the key services and facilities of regional

South Asian ports versus Sri Lanka. JAA consultants also identified potential investment sources and IT applications, and developed pilot action plans necessary for Sri Lanka to market its potential as a cruise hub. This assignment also included the recommendation of a foreign direct investment (FDI) attraction plan.

As follow-up to this assignment, JAA provided technical assistance to help the cluster prepare a pre-feasibility report on the pilot project, to be used to raise financing and support for the pilot project.

ICT & Electronics Division Trade and Investment South Africa—ICT Trade and Investment Strategy USAID

The ICT & Electronics Division of Trade and Investment South Africa (TISA) was, inter alia, tasked with developing a trade and investment strategy for the information, telecommunications & electronics sector in South Africa. Given the rapidly evolving nature of this sector internationally, the Division required state-of-the-art consultancy inputs to develop this strategy in line with international best practice.

JAA provided a specialist consultant to assist TISA to formulate a Scope of Work to provide TISA with a trade and investment strategy on information, telecommunications & electronics, and to develop a proposal for building capacity in TISA to effectively promote investment and exports in this sector. The consultant reviewed material on ICT sector in South Africa; held meetings with and interview TISA staff with the objective of understanding the current activities carried out by TISA and TISA's potential role within the strategic framework of South Africa's development of the ICT sector; held meetings with the private sector companies and organizations to understand the current issues that the South African ICT sector is facing; and met with public sector agencies that are crucial to the further development.

Agribusiness Development Assistance in Nigeria – Apparel and Textile Industry Strategy USAID

JAA was a core firm in the design of a program for USAID to assist Nigerians to massively increase agricultural and agribusiness exports. The program's analytical and "action" process will include competitiveness approaches such as cluster development and value chain analysis. The design also included focus on AGOA-benefited industries, and in particular on the opportunities for apparel and textiles.

JAA led a team that examined the opportunities for Nigeria to develop its apparel and textile industries. JAA carried out an assessment of Nigeria's apparel and textile industry to determine its current status, constraints and potential opportunities under the AGOA legislation. The findings led to several presentations with Nigerian apparel and textile industry representatives and government officials, and the submission of two reports presenting other eligible sub-Saharan countries' activities under the AGOA legislation; identification of opportunities for the Nigeria textile and apparel industry and potential job creation for the Nigerian economy; and a detailed step-by step action plan enabling Nigeria to position itself in order participate and to benefit from AGOA. JAA provided clear strategies and perspective on international market requirements and best practices as the basis for the strategies and action plans. JAA also provided advice and technical assistance on the key actions needed to achieve AGOA certification and to jump-start key investment. Linkages were examined with the cotton sector.

Institutional/Organizational Improvement and Public-Private Dialogue

J.E. Austin Associates, Inc. (JAA) has achieved notable successes in helping public and private clients to restructure, focus and improve the performance of key institutions. These assignments have included sector-wide restructuring (e.g. Botswana's transport sector); creation of sound institutions for public-private dialogue and competitiveness (e.g. competitiveness councils), apex business organizations, think-tanks; improvement and establishment of member driven business associations, restructuring of individual businesses, and restructuring of individual service agencies. JAA also has quite extensive experience in the restructuring and improvement of educational and academic institutions, linking them to market based needs.

An important element of institutional development, competitiveness and private sector development projects is the attention paid to the development of public-private dialogue. Whether creating a mechanism to jump-start dialogue or strengthening existing mechanisms of dialogue; the development of a system by which the private sector and public sector can discuss issues related to the economic and social development of a country and plan for future development is a key element of many projects.

JAA's involvement in the development of the Manual for Action in the Private Sector (MAPS) projects, the precursor to many competitiveness related projects, included an important element of dialogue development through the diagnostic studies of the economic and business context within various countries. These diagnostics provided the necessary information for the private sector to engage the public sector on action plans to remove obstacles of economic development.

In recent JAA competitiveness and related projects, the mechanism, which has been especially effective, has been the development of competitiveness councils, as a means to fostering public-private dialogue and action. JAA has or is working on the development and implementation of national competitiveness councils in Croatia, Sri Lanka, Thailand, and Uganda.

An alternative to developing a new mechanism for dialogue promotion is to strengthen existing forums for engaging the private and public sectors. In Bulgaria, JAA is involved in the strengthening of the Economic Growth Council, to improve business collaboration as a means to fostering a more cohesive private sector to engage with the public sector.

Listed below are examples of ongoing and completed projects:

Restructuring of the Uganda Investment Authority (UIA) and Preparation of a 2-Year Work Plan

Government of Austria and World Bank

JAA provided an analysis of the Uganda Investment Authority's (UIA) performance, mission, strategy, staffing, organization, financial situation and stakeholders and assisted UIA to finalize its institutional objectives, its strategic plan and develop a 2-year work plan. JAA provided the UIA with assistance in defining the necessary institutional restructuring requirements, to manage organizational changes and human resources issues.

Increasing the Effectiveness of the Albanian Business Advisory Council (BAC)

World Bank

JAA assisted Albanian stakeholders and the World Bank Southeast Europe Enterprise Development (SEED) Program to assess the Albanian BAC, and to provide an action plan for improvement.

A priority of the Government of Albania (GoA), the project is designed to increase the efficiency of the BAC, addressing and strengthening public-private dialogue. The BAC was established through a Council of Ministers decision in early 2000, as a forum within which to discuss and advocate for important issues relating to Business Development Services; Customs and Fiscal Policies; Investment Promotion Policies and other matters related to investment and business. The BAC is composed of 17 members representing key Ministries and the Business Community.

Prior to the JAA intervention, the BAC faced numerous challenges. The voice of the business community was still weak, and the BAC had several operational problems. BAC meetings were held without an annual agenda, but on an “emergency” basis, without sufficient time for preparation and/or consultations with respective experts. Meetings were not well structured, and often did not adequately adhere to the agenda. There was very little reporting, and little feedback to members on subjects discussed, decisions taken and follow-up. De facto, BAC activities were limited only to advocacy regarding government laws and decisions. BAC restructuring will ensure and facilitate continuous and increasingly strategic dialogue between government and business community; will clarify the mission and key objectives of the BAC; and improve responsibilities and operational linkages among stakeholders – all to better address Albania’s needs for economic growth and a sound, enabling business environment.

JAA conducted a detailed assessment of the BAC, discussed its issues with stakeholders and convened a roundtable to discuss proposals for improvement. JAA then provided very practical steps to improve both the operations and the strategic focus of the BAC. These have been incorporated into SEED’s program implementation plan.

Uganda Support for Private Enterprise Expansion and Development Project (SPEED) — Assistance to the Ministry of Finance; Planning and Economic Development (MoFPED); the Uganda Export Promotion Board (UEPB); the Uganda Investment Authority (UIA); and the Uganda Tourism Board (UTB)

USAID

Under the Uganda SPEED Project, JAA assisted the Government of Uganda (GoU) to plan the merger of the Uganda Export Promotion Board (UEPB), Uganda Investment Authority (UIA) and Uganda Tourist Board (UTB). The work was carried out as part of the Medium Term Competitiveness Strategy (MTCS).

A merger of the UIA, UEPB and UTB had long been discussed. President Museveni, in September 2001, mandated the merger, conceived to improve results and achieve operating efficiencies related to the promotion of investment, exports and tourism. The Ministry of Finance and Economic Planning (MoFPED) requested JAA to provide assistance to design the organization and work plan for the new entity, and the steps to be taken to implement the change. A team of 3 consultants undertook this challenging assignment.

Because of the sensitivity of the merger, the need to try to minimize disruptions and uncertainties, and the need to effectuate a smooth transition, a very transparent and step-wise process was conceived and implemented. SPEED was not asked to comment on or reconsider the President’s decision, but only to provide the optimum blueprint for implementation. The process was a valuable and innovative one, which has informed subsequent sectoral, investment and competitiveness thinking and implementation and subsequent government budget allocations. In the course of the assignment, the team prepared several technical notes, which continue to provide national guidance on matters concerning business-led economic growth.

Bulgaria Competitiveness Exercise/Program (Bulgaria Policy Reform and Advocacy Strengthening Project)

USAID

JAA implemented a particularly intensive competitiveness program as part of the Policy Reform and Advocacy Strengthening project. JAA helped to build stakeholder coalitions to promote competitiveness for Bulgaria, with particular emphasis on business strategy and improvement of the microeconomic environment for business. The program included competitiveness presentations to over 1000 leaders from businesses, government, and other stakeholders and follow-up with strategic work among 7 industry clusters (IT, apparel, wine, maritime transport, tourism, agribusiness and canning). The team formed cluster working groups, led by Bulgarians who had been trained by JAA to convene and facilitate the industry discussions. This process was supported by a number of competitiveness case studies of industries and companies, prepared by Bulgarian counterparts under JAA supervision. For the clusters that were the most committed to the competitiveness process, JAA assisted the competitiveness thinking by mobilizing industry experts to help the industry stakeholders examine their strategic issues.

The climax of the competitiveness exercise was a national competitiveness conference. In addition to top-level keynote speakers, the conference was particularly focused on the work of the industry cluster groups. Competitiveness action plans were discussed by the industries and presented at the conference. This exercise was notable in stressing the role of local stakeholders in implementing the competitiveness process. It also emphasized upon a decentralized approach to cluster work and public-private dialogue.

Competitiveness is now widely accepted as a guiding theme for business and government in Bulgaria. The industry groups are continuing their collaboration. JAA facilitated a weeklong visit to Ireland (with the assistance of USAID, World Learning and Management Systems International) by public sector and business leaders to examine some of the mechanisms for Ireland's success. While budget limitations restricted intensive, continuous assistance, JAA's team has now been remobilized to assist the ICT cluster to develop its industry strategy, and to improve business collaboration and the strategic focus of the national Economic Growth Council.

Croatian Competitiveness Initiative

USAID

JAA is leading a long-term Competitiveness Initiative in Croatia, which began in April 2001. An earlier introductory exercise in Southeast Europe pinpointed the lack of institutionalized private-public dialogue mechanisms as a constraint. It also developed a Leadership Map of Croatian private and public leaders and generated commitment to forming a Croatian Competitiveness Council. After the inception of the Competitiveness Initiative project, JAA served as the catalyst for the formation of the Croatian Competitiveness Council (CCC), composed of 15 leading Croatian CEOs, including two leaders from HUP—Croatia's leading voluntary business association that also represents SMEs. The Council has met monthly since May 2001, defined 6 key constraints to economic growth, and is developing action plans for the implementation of initiatives to address them. This is the first business roundtable of its kind in Croatia. Shortly after its formation, the Deputy Prime Minister signed a formal Memo of Understanding on behalf of the Government of Croatia recognizing the Council and agreeing to engage in a dialogue with it.

JAA also served as a catalyst to engage the heads of Croatia's 4 leading labor unions and 5 leading universities. This, along with its work with government leaders, culminated in the formation of the National Competitiveness Council representing business, government, labor, and educators. The purpose of this council is to identify leading constraints to sustainable economic growth, to help the Government set priorities, and to monitor implementation. The

project is working with several secondary cities on forming regional competitiveness councils to undertake regional initiatives.

JAA has also provided strategic and technical assistance to 3 industry clusters (IT, wood products and tourism). The wood cluster brings together representatives from all parts of the value chain - from forest to final production and retail including the monopoly supplier, Croatia Forests. It also includes representatives from the Ministries of Economy and Agriculture and Forestry, as well as academic institutions. The Wood Cluster, working at the national level as well as with producers in and around the city of Varazdin, drafted its own strategy that was completed in March 2003. Other regions have also taken an interest in the activities and are endeavoring to develop their own clusters along a similar model.

Sri Lanka Competitiveness Exercise/Initiative USAID

JAA was contracted to carry out a competitiveness exercise in Sri Lanka. Through this assignment, JAA conducted 26 workshops on competitiveness, cluster development and competitive strategies for business and government leaders. JAA worked with leading business associations to focus on techniques of effective dialogue and emphasized the need to work with one voice, ensure bi-partisan support and to prioritize its advocacy efforts. In October of 1998, for the first time in Sri Lankan history, all 5 leading business associations came together and issued a set of 10 key priorities, calling on the Government to work in bi-partisan ways to address these. Since that time, priorities have been expressed annually with greater levels of analytical sophistication, and have led to direct sessions with the head of state and business leaders. The Ceylon Chamber also established its Economics Intelligence Unit. The Minister of Industrial Development, the Minister of Trade and the Board of Investment requested competitiveness-training sessions for approximately 20 top staff in each of these three ministries. The Minister of Industrial Development adjusted his productivity campaign to include a focus on competitiveness. The Minister of Trade, who was trying to generate support in South Asia for a regional trade agreement, sponsored a regional competitiveness conference.

On the basis of the results from the competitiveness exercise, USAID issued an RFP, and JAA (through the Nathan-MSI GBTI consortium) was awarded the contract to implement a longer-term Competitiveness Initiative. JAA facilitated the development and implementation of competitive strategies in 5 industry clusters: rubber, tourism, gems and jewelry, tea and ICT. Given the success of this initial group, the program was expanded to include 3 additional clusters: ceramics, coir and spices.

JAA is also assisting the Government of Sri Lanka in the establishment of National Competitiveness Council. JAA has worked with partner organizations in Sri Lanka on the inclusion of Sri Lanka in the Global Competitiveness Report, published by the World Economic Forum in association with the Harvard Institute for International Development.

Each of the 8 clusters is implementing 3 or more action initiatives, are jointly invested, are achieving notable improvements in bottom-line results, value added and market position. For example, prior to the project's work with the Rubber cluster, Sri Lanka held approximately 20 percent of the world market for specialty all-rubber, non-pneumatic tires. Today Sri Lanka has over 30 percent of the world market for all-rubber, non-pneumatic tires. The tourism cluster has come together to develop and implement an ecolodge to attract high-end adventure and ecotourism patrons. Individual companies have also benefited enormously from the strategic planning and cluster work, adopting strategies and operational improvements for their individual enterprises.

Assistance to the Centre d'Appui aux Pétites et Moyennes Entreprises au Rwanda (CAPMER)

United Nations International Development Organization (UNIDO)

The Centre d'Appui aux Pétites et Moyennes Entreprises au Rwanda (CAPMER), a professional services organization with mandate to assist the growth and development of small and medium enterprise, was established in 2000. It is responsible to the Ministry of Commerce (MINICOM), and has been funded to-date through the UNIDO Programme Intégré de Développement Industriel du Rwanda. It seeks to establish itself as a credible resource offering quality consulting, training and information services to SMEs. UNIDO and CAPMER asked JAA to study and provide recommendations on how to restructure CAPMER as an independent organization with voting members that would include private entities, the government, and international agencies. UNIDO planned to continue support to CAPMER in the short term, and the World Bank Competitiveness and Enterprise Development Project had dedicated a component to assisting CAPMER's activities. The restructuring of CAPMER was a condition for this component of the World Bank loan.

JAA provided assistance to UNIDO in conducting this study. JAA assisted in obtaining agreement with the World Bank as to the requirements for effectiveness of the CAPMER component of the project; and helped CAPMER to prepare the needed inputs for the component effectiveness, to define its Business Plan and to identify its requirements under the World Bank Project component. JAA also provided recommendations on next steps in CAPMER finalizing and implementing their business plan under the World Bank Competitiveness and Enterprise Development Project

Food Security Study

CARE, Inc. (Cooperative for Assistance and Relief Everywhere, Inc.)

CARE's use of food aid has significantly influenced how CARE carries out programs and how it is structured. In addition, programming food aid has given CARE its visibility with host governments and communities, and has contributed enormously to the growth of the organization. Given the array of issues around food aid and how to use it, CARE undertook a comprehensive Policy Review on the use of food resources in its programs. This Review led to recommendations for an organization-wide, updated policy.

As part of this process, CARE developed five major policy papers. JAA was engaged by CARE to prepare 3 of the 5 the assessments: external trends and policies, stakeholder analyses, and food and its impact on CARE as an organization.

These analyses considered broad issues such as the use of food aid for emergency, general relief and safety net programs with direct distribution as the mechanism of choice; the appropriate degree of emphasis on monetization, as converting food aid into a cash resource provides greater program flexibility to address food insecurity in the long term; the socio-economic and political environments in which CARE operates; and effects of trade liberalization, economies in transition, new political leadership and philosophy in developing countries and declining donor foreign aid budgets.

JAA examined the impact of food resources on the CARE organization. The JAA team reviewed impacts on the organization's financial and administrative and management (logistics, inventory and monitoring systems, internal audit, legal considerations, human resources, donor relations) choices.

JAA also analyzed major social, political and economic changes, trends and directions at global and regional levels and identified those that may have major effects on addressing food security. JAA examined the interests of different stakeholders who provided or received food resources, i.e. regions or countries experiencing long-term, chronic food deficits, short term cyclical deficits and those regions and countries normally food self-sufficient or would be net exporters of food. In the context of the identified changes, trends and directions, JAA examined

the role, threats and opportunities for the use of food resources for alleviation of poverty. JAA studied the role of food as a resource in short-term natural disasters and complex political emergencies providing information on successes, lessons, threats and opportunities encountered in these situations.

JAA provided recommendations related to trends in globalization (including implications from technology and information, transnational business trends, international capital flows and trade trends, etc.); global ecology (including Implications from climate change, and trends pertaining to soil degradation, deforestation, from biodiversity and energy); food and agriculture (including Implications from food production, consumption and trade trends, and biotechnology issues); governance; and poverty.

Organizational and Technical Assistance to Opportunity International Opportunity International

JAA worked with Opportunity International on the development of appropriate organizational mechanisms, guidelines, incentives and approaches for improving the effectiveness of their 60 implementing partners and 7 support partners worldwide. JAA provided effective solutions to the Board and the Director's concerns regarding improving results, organizational effectiveness, and technical assistance. JAA presented Opportunity International with best practices in corporate and social enterprise organization and management, and helped Opportunity International to create a strategy and action plan for organizational change. JAA was also responsible for facilitating the internal dialogue and decision-making process, which contributed to consensus and effective implementation of the strategy and action plan.

Assistance to Inversiones Consolidadas de Honduras, S.A. de C.V (The INCONHSA Group)

Inversiones Consolidadas de Honduras, S.A. de C.V (The INCONHSA Group)

The INCONHSA Group, based in Honduras, is one of the largest Central American business groups. JAA carried out a series of assignments, providing advice and assistance initially to improve The INCONHSA's internal organizational and management structures. JAA provided technical assistance and guidance to improve productivity and devolve responsibility to motivated teams; to focus on people and customers; to evaluate business opportunities; and to developing focused business plans. JAA the assisted INCONHSA to developed international marketing plans, and to consider a regional investment strategy, including linkages with other regional investors.

LIBRARY/RESOURCES

Through the implementation of various projects, JAA has developed a number of tools, resources and key reports related to the JAA approach to economic development. Listed below are some of these resources.

Websites

Bulgaria Competitiveness Exercise	www.competitiveness.bg
Mongolia Competitiveness Initiative	www.tcimongolia.org
Southeast Asia Competitiveness Exercise	www.seasia-strategy.com
Sri Lanka Competitiveness Initiative	www.competitiveness.lk
Thailand Competitiveness Initiative (SEACI)	www.kiasia.org/comp
Vietnam Competitiveness (SEACI)	www.vnci.org

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