

BACKGROUND BRIEF NO. 22

HARNESSING SERVICES TRADE FOR DEVELOPMENT:

A BACKGROUND AND GUIDE ON SERVICE COALITIONS IN AFRICA AND THE CARIBBEAN

MARCH 2012

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This Background Brief was prepared by Michelle Hustler and David Primack, with inputs from Doreen Conrad and Diane Girard. It has also benefited from the input of various ILEAP staff and Advisors, including Sékou Falil Doumbouya, Lynette Gitonga, Nick Charalambides and Dan Lui. The views expressed herein are those of the authors and should not be attributed to any other persons or institutions. Comments should be directed to the ILEAP Secretariat (ileap@ileap-jeicp.org).

This publication has benefited from funding to ILEAP's Trade in Services work programme. ILEAP gratefully acknowledges support from the International Development Research Centre (IDRC, Canada); the Canadian International Development Agency (CIDA); and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

This publication should be cited as:

Hustler, M. and D. Primack. 2012. Harnessing Services Trade for Development: A Background and Guide on Service Coalitions in Africa and the Caribbean. Toronto: ILEAP (Background Brief No. 22)

This publication is also available in French via ILEAP's website.

TABLE OF CONTENTS

PART 1 – SERVICES MATTER.....	5
Introduction.....	5
Why Services Are Important.....	5
Trade in Services	6
Challenges.....	6
PART 2 – SERVICE COALITIONS AND EXPERIENCES IN DEVELOPED COUNTRIES.....	8
The Service Coalition Concept.....	8
Coalitions and Their Impact on Stakeholders	11
PART 3 – SERVICE COALITIONS IN DEVELOPING COUNTRIES: EXPERIENCES FROM THE CARIBBEAN & SUB-SAHARAN AFRICA.....	12
Coalitions in Developing Countries.....	12
The Caribbean Experience with Services Coalitions.....	13
Implementation Challenges and General Lessons from the Caribbean	16
Coalition Building in Sub-Saharan Africa.....	17
PART 4 – ESTABLISHING COALITIONS.....	20
Key Steps to Forming Coalitions	20
Other ‘Nuts and Bolts’ for Establishing a CSI	22
The Issue of Sustainability	23
Coalition-Government Relations	24
The National-Regional Interface	25
PART 5 – CONCLUSION.....	26
REFERENCES.....	28
APPENDIX A – Services as % of GDP in African and CARICOM Countries.....	29
ANNEX I – THE COALITION OF SERVICE INDUSTRIES MOVEMENT	30

LIST OF BOXES AND TABLES

Box 1 – List of active service coalitions and related organizations
 Box 2 – Phase 1 of the Barbados Coalition of Services Industries
 Box 3 – Recent Update on CSIs in the Caribbean
 Box 4 – ILEAP’s support for coalition building in SSA

Table 1 – Approach and Features of Select Services Coalitions
 Table 2 – Potential Impact of Establishing Services Coalitions on Various Stakeholders
 Table 3 - BCSI Priorities and Core Activities (By Unit)
 Figure 1 – Phases in the CARICOM Approach

ACRONYMS

AISU – Association Incubation and Support Unit (BCSI)

BCSI – Barbados Coalition of Service Industries

BMO – Business Membership Organisation

BSO – Business Support Organisation

CARICOM – Caribbean Community

CARIFORUM – The Caribbean Forum
(CARICOM + Dominican Republic)

CSI – Coalition of Service Industries (see also USCSI)

CSME – The CARICOM Single Market and Economy

EABC – East African Business Council

EAC – East African Community

EACSI – East African Coalition of Service Industries

EPA – Economic Partnership Agreement

ESF – European Services Forum

FTA – Free Trade Agreement

FTAA – Free Trade Area of the Americas

GSC – Global Services Coalition

GSN – Global Services Network

HKCSI – Hong Kong Coalition of Service Industries

ILEAP – International Lawyers and Economists Against Poverty

ILO – International Labour Office

ITC – International Trade Centre

MSMEs – Micro, Small and Medium Enterprises

NAPSEC – (Malaysia) National Professional
Services Export Council

PSDC – (Malaysia) Professional Services
Development Corporation

PSFU – Private Sector Foundation Uganda

REC – Regional Economic Community

SECEP – Service Exporters Certificate of
Excellence Programme (BCSI)

SLCSI – Saint Lucia Coalition of Services Industries

TTCSI – Trinidad and Tobago Coalition of Service Industries

UEPB – Uganda Export Promotion Board

UNCTAD – United Nations Conference
on Trade and Development

USCSI – United States Coalition of Service
Industries (also referred to as CSI)

USEA – Ugandan Services Exporters' Association

PART 1 – SERVICES MATTER

“Services constitute two-thirds of the world economy and are the fastest growing component of world trade. They are core drivers of economic growth, employment and development in every part of the world.”

– Excerpt: Global Services Coalition Media Release, Oct. 2009

INTRODUCTION

While there are many factors to consider in the development of an internationally competitive services sector, this paper highlights one of the key, far reaching factors for the private sector – the establishment of a national (and/or regional) coalition of service industries.

A service coalition is an organization of stakeholders related to the services sector who may have diverse interests, but who share common industry-wide objectives – the development of the service industry. The objectives of the stakeholders are more efficiently accomplished through a coalition engagement.

The benefits of establishing a well-functioning service coalition are far ranging and include the organization of the services sector; awareness building of services stakeholders; representation to the government on issues affecting the service industry including trade negotiation processes and policy and regulatory reforms; enhancing the competitiveness of services sectors and private sector businesses and promoting and facilitating services exports, amongst others.

This Background Brief aims to contribute to the on-going discussion about service coalitions, examining in greater detail the potential role and value-added they can provide. It offers a useful distinction between coalitions in the developed versus developing world, drawing in particular on experiences in the Caribbean, as well as some nascent efforts in sub-Saharan Africa (SSA). After setting this context and background, the paper shifts to offer some specific guidance to those interested in establishing a successful coalition. In drawing insights from the Caribbean and SSA developing country experiences, the paper undoubtedly omits lessons from elsewhere in the developing world (notably in Asia and Latin America) – a gap to be filled by future research. The paper concludes with a brief summary, highlighting where possible some critical factors for success.

WHY SERVICES ARE IMPORTANT

The services sector plays an integral role in the functioning of any modern economy and affects growth and development through various channels. From the important social role health and education services play in affecting the quality of life and skills of the labour force, to the essential basic infrastructure provided by telecommunication, financial and energy services, to the invaluable role transportation services play in supporting the traditional manufacturing and agricultural sectors, and as well the value professional services impart in enhancing the competitiveness of any business. Simply put, the services sector is the cornerstone of all economic activity.

Recent statistics show that the services sector accounted for almost 71% of global GDP in 2010 and is expanding faster than either the agriculture or manufacturing sectors.¹ According to the ILO, employment in services surpassed that of agriculture in 2001 and the gap between the two has grown ever since.² Yet while the services sector of developing country economies continues to grow in line with these trends, trade in services from these countries comprises only a very small portion of total international trade and is concentrated largely in tourism and related sectors (see Appendix A – Services as a % of GDP in African and CARICOM Countries).

Through the expansion of global markets from increased openness across all sectors, coupled with the context of the modern digital economy, the importance of the services sector has become even more profound. Effectively all services have become potentially tradable through the internet and supply and demand has become global. Further, the internet is an international ‘levelling’ tool. It enables even small firms in developing countries the opportunity to both establish credibility and market their services internationally. It also allows for the overcoming of physical barriers such as being a remote island or landlocked country. The foundation for actively developing the services sector and supporting services exports has been laid.

¹ World Development Indicators 2011.

² ILO Global Employment Trends 2011.

TRADE IN SERVICES

Trading in services offers significant opportunities both in terms of increased exports and imports, aimed together at enhancing competitiveness, stimulating economic development and ultimately, improving welfare and reducing poverty. At the same time, capitalising on these opportunities presents a myriad of challenges.

On the import side, the potential competition-driven benefits of expanding the range of services available to consumers, decreasing costs and increasing quality, including through the attraction of FDI, is an oft-cited benefit from greater services imports (and thus liberalisation). Indeed when materialising, not only can such impacts assist the development of the services sector in question, the relative efficiency gains can have essential spillover effects throughout the economy. On the other hand however, this can also raise concerns about the possibility that domestic service suppliers will be unable to withstand greater foreign competition, that domestic monopolies may eventually become foreign monopolies, and that jobs and other service inputs may be too easily sourced abroad.

What is all-too-often left out of the broader equation is the export side of trade in services, which has the potential to serve as an essential vehicle for economic diversification and structural transformation. Apart from the obvious benefit of generating needed jobs, income and foreign exchange, there are many other benefits to developing an internationally competitive services export sector. For one, a successful services company does not necessarily require large start-up capital, numerous employees or large financial investments to export successfully. Therefore the potential for micro services companies to develop and trade successfully is quite feasible – a particularly important consideration in developing countries, where firms tend to be smaller and more capital scarce. As such, the potential for positive impacts on poverty alleviation are high. This possibility can lead to the establishment of new businesses, the development of specialty services, employment opportunities and potentially reduce the ‘brain drain’ that is often associated with developing country service professionals. Understanding however that these opportunities exist no matter the ‘location’ of the business is essential for such possibilities to come to fruition.

Furthermore, readily available local, high quality services will not only add value to businesses across all sectors, it can potentially reduce the need of having to import these services from elsewhere, and correspondingly lower import expenses. The availability of local high quality services can also be an attraction in securing foreign direct investment, as this may reduce investors’

needs to import the necessary services to maintain international competitiveness.

Lastly, services are often more ‘green’ – in that they have a comparatively smaller ecological footprint than either the agricultural or manufacturing sector (though IT-based services have raised increasing concern surrounding energy consumption).

CHALLENGES

Despite the vast potential of the services sector, the challenges for harnessing them are numerous – exacerbated by the endemic scarcity of available and/or quality services data.³ The following points illustrate some key challenges, in particular as they relate to areas where service coalitions may be able to assist.

Fragmented – Firstly, there is no single ‘services sector’. The services sector is a collection of roughly 160 sub-sectors and is wide and typically fragmented. Consequently, this poses a serious challenge with respect to dialogue with the private sector. In absence of a service sector focal point, or strong sectoral focal points, there are difficulties collecting and disseminating information, which often results in sub-optimal representation of views in services-related decisions.

Governments face struggles in collecting positions as they relate to development strategies for the services sector as a whole or for specific sub-sectors, including with regards to the introduction of new incentives, policies or regulatory changes. Trade negotiators face a similar impediment in collecting private sector positions regarding services and in keeping the sector informed of the progress of trade negotiations (or ideally enabling them to help shape the agenda). The private sector is challenged equally in obtaining relevant information as well as communicating with the rest of the services sector with respect to the establishment of cross-sectoral clusters or other multi-sub sector strategies. This fragmentation, and correspondingly the deficit in the consultative process, adversely affects the framework of services trade.

Poorly Understood – In general, trade in services, including the requisite policy framework, as well as the opportunities presented, are not well understood. As noted at the outset, data on the services sector – and in particular on imports and exports of services – is often hard to come by, creating scepticism about the potential benefits. Furthermore the constraints to increasing cross-border trade in services can also be difficult to establish – this lack of clarity is compounded by the technical complexity of service negotiations where ‘the devil is in the detail’, for example when comparing the close linkages that often exist between different ‘modes’ of cross-border supply such as investment and the movement of personnel.

Primarily MSMEs – The services sector (in developing countries in particular) tends to be comprised of micro and small businesses who do not have a wide range of resources available to them and may often not have the general business skills needed to export successfully (as aside from the technical knowledge related to the sector itself). A key constraint (see also below) relates to their inability to access financing.

Competitiveness – Service providers typically need to both enhance the standard of their offerings and develop new skills in order to be able to export successfully. These skills need to be developed in-house to reduce the costs of outsourcing. Training in the general skills required to export as well as advanced sector-specific training tends not to be readily available nationally in many developing countries (i.e. ISO 9000 certification).

Market Intelligence – The services sector is very fluid and can change quickly. This makes timely market intelligence difficult to obtain, without which firms are pressed to have the requisite information to make sound business decisions.

Establishing Credibility – Due to the intangible nature of services, service providers, particularly from developing countries face serious challenges in establishing credibility in the international marketplace.

Weak Associations – Service sector trade associations in developing countries tend to be weak and not actively engaged in lobbying activities, export facilitation or international partnering initiatives. This is particularly the case for sectors outside the more prominent areas (e.g. banking, insurance, telecoms, etc.). As noted in a recent World Bank publication on exporting services in developing countries, the presence of effective industry associations (sectoral and cross-cutting) can play a significant role in accessing international services markets.⁴

Financing – Accessing financing for services enterprises is a challenge due again to the intangibility of services and therefore the lack of traditional collateral that might underpin a business loan (e.g. the bank manager can neither visually assess the service offerings, nor use the service offerings as a form of collateral against which to collect payment). This is perhaps one of the greatest single impediments to unlocking the potential of services to promote development – notably amongst MSMEs.

Government Support - Government tends to focus its support on the traditional manufacturing or agricultural sectors. This is due to a variety of reasons, including a widespread lack of understanding with respect to the services sector, uncertainty with respect to harnessing the potential of the services sector (supported again by the lack of data) and emotional, historic and

political ties to the manufacturing and agricultural sectors and key players in these sectors. The failure to appreciate and act on the potential of the services could be significantly mitigated with focused lobbying from the services sector and/or a service coalition.

As is quickly evident from above, and to be further demonstrated throughout the paper, the establishment of a national (and possibly regional) body with responsibility to promote the services sector is fundamental to any country that truly wishes to develop its services sector – which is and should be the ultimate objective. Such a ‘coalition of service industries’ (or CSI) can potentially assist in solving and/or mitigating many of the above challenges – provided it is both well-functioning and well-supported (i.e. has a strong financial/resource base and is actively cooperating with relevant stakeholders).

⁴See Goswami et al. 2011

PART 2 –SERVICE COALITIONS AND EXPERIENCES IN DEVELOPED COUNTRIES

THE SERVICE COALITION CONCEPT

A service coalition is an organization of stakeholders related to the services sector who may have diverse sub-sectoral interests, but who share common industry-wide objectives – namely the development of the service industry. The objectives of the stakeholders are seen to be more efficiently accomplished through a coalition engagement.

The coalition movement began in the 1980's with the establishment of the US Coalition of Service Industries (USCSI). Since then new coalitions have been established in countries throughout the world (see Box 1 for a list of active service coalitions and related organisation; Annex I provides some additional background information on the CSI movement and key leading CSIs).

Like USCSI, most developed country service coalitions focus on lobbying and raising the profile of the service sector. These efforts traditionally revolve around the market access needs of their membership – i.e. promoting services liberalization. For example, these coalitions are actively involved in negotiation processes, providing position papers from their membership or interfacing with the negotiators directly. Their interventions are usually focused on the liberalization necessary, or other types of market access changes required to increase the market share of their members.⁵

The coalitions in developed countries also seek to raise the profile of the services sector by providing statistics and other evidence regarding to the importance of this sector. They typically encourage governments to focus attention on this sector as it relates to necessary policy changes, incentives, or other initiatives that the government might put in place that their members believe would enhance the competitiveness of the sector. Such pronouncements are common when global leaders meet on major economic issues (e.g. G8, G20, WEF, etc).

In terms of the historical experience of service coalitions, it is important however to note that over time differences have emerged since the original USCSI 'template' in terms of the goals, strategies and structure of coalitions in different countries. Based on more detailed information provided in Annex I, Table 1 below presents a brief summary, which highlights key features of services organisations in the United States, Europe, Hong Kong and Malaysia as well as those established to lobby at the global level.

One key conclusion from the analysis of different services coalitions worth noting at the outset is that while some organisations (such as USCI and the European Services Forum) continue to focus on lobbying activities to open up global services markets, a slightly different model has emerged in countries like Hong Kong and Malaysia, which focus also on developing the services sector to be able to export and make use of the market access opportunities available globally. As we delve into in more detail in the next section, these types of coalitions can serve to augment and/or complement public sector institutional roles.

COALITIONS AND THEIR IMPACT ON STAKEHOLDERS

Although different service coalitions inevitably vary in terms of the scope of their activities, Table 2 offers some insights on the broad potential impacts of a coalition on various groups of stakeholders. In broad terms therefore it is possible to define the potential role of service coalitions in terms of their ability to help raise the profile of trade in services throughout society, enhance the quality of services-related policies and negotiating positions, and ultimately increase services exports. Particularly in developing countries, one essential element of success is building capacity amongst services associations and individual entrepreneurs to achieve these various aims. As such the next section details some insights from the Caribbean that demonstrate how service coalitions in developing countries are engaged in serving many of the traditional duties outlined above, as well as playing a more prominent role in specific activities to help develop their nascent services sectors.

BOX 1 – LIST OF ACTIVE SERVICE COALITIONS AND RELATED ORGANIZATIONS

Antigua and Barbuda Coalition of Service Industries www.abcsi.org	Australian Services Roundtable www.servicesaustralia.org.au
Barbados Coalition of Service Industries www.bcsi.org.bb	Belize Coalition of Service Providers www.c-nsc.org/network/belize
Brazilian Association of Information Technology and Communication Companies www.brasscom.org.br	Business New Zealand www.businessnz.org.nz
Canadian Services Coalition www.canadianservicescoalition.com	Caribbean Network of Service Coalitions (CNSC) www.c-nsc.org
Coalition of Service Industries Malaysia www.micci.com	Dominica Coalition of Service Industries www.dominicacoalition.org
European Services Forum (ESF) www.esf.be	Federated Services of the State of San Paulo (Brazil) www.fesesp.org.br
Global Services Network (GSN) www.globalservicesnetwork.com	Grenada Coalition of Services Providers www.c-nsc.org/network/grenada
Hong Kong Coalition of Service Industries www.hkcsi.org.hk	Jamaican Coalition of Service Industries www.jamaicacsi.org
Japan Services Network www.keidanren.or.jp	Mexican Services Coalition
National Association of Software and Service Companies (NASSCOM, India) www.nasscom.in	National Federation of Service Industries (Norway) www.nhoservice.no
Saint Lucia Coalition of Service Industries www.slcsi.org	Services Exporting Committee of the Santiago Chamber of Commerce www.chilexportaservicios.cl/ces
Singapore Coalition of Service Industries www.sbf.org.sg	St. Vincent and the Grenadines Coalition of Service Industries www.svgcsi.org
Taiwan Coalition of Service Industries www.roccoc.org.tw	TheCityUK (formerly International Financial Services London) www.thecityuk.com
Trinidad and Tobago Coalition of Service Industries www.ttcsi.org	Uganda Services Exporters Association (USEA) / Coalition of Service Industries www.ugandaexportsonline.com/service_exports.htm
Union Argentina de Entidades de Servicios	US Coalition of Service Industries (CSI) www.uscsi.org

TABLE 1 – APPROACH AND FEATURES OF SELECT SERVICE COALITIONS (DRAWN FROM ANNEX I)

Coalition	Key Features of the Coalition – Objectives, Strategies, Structures and Members
US Coalition of Services Industries (USCSI)	Established in 1982, USCSI is primarily a lobbying organisation seeking to raise the profile of the services sector in the US and internationally. Members include high-profile international companies from a wide range of sectors, and key professional bodies as 'affiliate members'. It comprises a high-level Chairman's Circle plus working groups and committees covering specific sectors (e.g. financial services, telecoms, etc.) or markets (China, India). USCSI also champions the GSC and GSN (see below).
European Services Forum (ESF)	Established in 1999, ESF seeks to actively promote the liberalisation of international trade in services, with a particular focus on trade negotiations at all levels. Membership includes leading EU services companies and professional associations. It comprises a Leaders Group, Policy Committee and minimal secretariat.
Hong Kong Coalition of Services Industries (HKCSI)	Established in 1990, HKCSI aims to promote the continuing development and competitiveness of Hong Kong services industries. One feature of HKCSI is its location within the Chamber of Commerce, while membership is made up mostly of services associations within it. As such it has a strong internal role , acting as a focal point for liaison with government, raising awareness and promoting a 'service friendly environment', and strengthening cooperation on common goals of members.
Malaysia Professional Services Development Corporation (PSDC) and National Professional Services Export Council (NAPSEC)	Responding to a private sector memorandum on the future of its services sector, Malaysia created two national public sector bodies in 2001 with the aim of developing the services sector . PSDC is focused largely on services related to construction (e.g. engineering, architects, surveying, legal and accounting) and is an internal capacity-building organisation : it offers training (e.g. on ISO certification, project management, financial management, and on relevant trade and mutual recognition agreements) and also provides procurement notices, facilitates funding and grants, and undertakes trade missions. By contrast NAPSEC covers a wider range of businesses, advising on "matters pertaining to the export of professional services": public and private sector members meet quarterly to review services export development strategies (including incentives and funding initiatives), and identify export opportunities and market access issues.
Global Services Network (GSN)	Established in 1998, GSN is an open, informal network "committed to increased trade and investment and a rules-based multilateral trading system". While GSN is described as an interactive online community the role of members is largely passive (USCSI produces a newsletter received by members). Alongside objectives that include acting as a forum for identifying and removing barriers to services trade, strategising on individual sectors and knowledge-sharing, GSN also aims " to strengthen services organisations around the world " – it thus might become a source of proactive support for the growing number of CSIs.
Global Services Coalition (GSC)	GSC is an informal, umbrella body of services coalitions and similar services organisations that perform lobbying and advocacy at the global level . This is typically done through issuing joint statements (such as joint letters sent to G20 Leaders in 2009 and 2010 on protectionism and the stagnation of the WTO Doha Round) or missions to Geneva to meet negotiators. GSC is administered by USCSI with support from ESF; other notable members are listed in Annex I.

TABLE 2 – POTENTIAL IMPACT OF ESTABLISHING SERVICES COALITIONS ON VARIOUS STAKEHOLDERS

Stakeholder	Potential Impact	Impact Channel
Government	A more 'pro-services' government culture	Proactive lobbying to raise the profile of the national services sector, encouraging investment to enhance competitiveness, foreign exchange and contribution to growth / development
	Improved knowledge and responsiveness	Collection of information and views from the private sector (e.g. data) and dissemination to the private sector
	Better and more legitimised services policies	Acting as an efficient interlocutor who can serve as a credible voice for the sector and help officials dialogue better with its members for mutual benefit (e.g. economic reforms, FTAs)
Negotiators	More informed negotiating positions	Acting as a focal point and platform via which information on private sector positions and developmental needs on trade negotiations are readily obtainable
	Improved trust	Facilitating transparent consultation that leads to private sector views properly reflected in national positions
	Improved implementation	Assist in the simplification of technical trade information to ensure a better understanding at private sector level
Individual Services Associations	Increased lobbying power	Overarching ability to lobby on behalf of service associations with government or at an international level
	Better quality member service associations	Assistance to help establish new associations and strengthen existing ones with administrative and developmental support and by promoting high standards and best practice
	Promoting export-oriented services	Encouraging and training service associations to provide export-focused services to their own members
	More coordinated services strategies	Facilitating progress in areas where coordination is needed amongst different national sector associations
	Networking	Increased contact between national coalition members, and facilitation of international contacts (e.g. on regional level)
Individual Private Sector Operators	Better awareness and representation on policy issues	Accessible, non-technical information (e.g. web platforms) on trade in services issues that can impact, either positively or negatively, on overall private sector competitiveness
	Access to improved information on opportunities	Provision of market information and export promotion activities; national and international networking opportunities and help in forming strategic alliances
	Capacity-building activities	Training and support to enhance the competitiveness of the private sector
	Reputational benefits	Through association with a coalition, or initiatives such as awards programmes
Public	Improved awareness	Raising the profile of the services sector and related policy issues to build support and ensure that the value and contribution of the sector is well understood

PART 3 – SERVICE COALITIONS IN DEVELOPING COUNTRIES: EXPERIENCES FROM THE CARIBBEAN & SUB-SAHARAN AFRICA

“Notwithstanding the fact that the services sector of the Community is the largest in terms of employment, share of total output, and trade, it is characterised by fragmentation of effort and lack of a common focus to increase international competitiveness. Further, it often appears that the interests of the stakeholders are too diverse to foster its overall development. Therefore, it is indispensable that the service sector stakeholders be organised.” – His Excellency Edwin Carrington, Secretary General of CARICOM at the 2009 launch of the Belize Coalition of Service Providers

This section considers the coalition phenomenon from a developing country perspective, drawing primarily on some of the early and more recent experiences with coalition formation in the Caribbean. In doing so, the approach is intended to be illustrative rather than exhaustive future research aims to consider experiences elsewhere in the developing world. The section also provides a glimpse into some current coalition efforts in sub-Saharan Africa.

COALITIONS IN DEVELOPING COUNTRIES

As the coalition movement has continued to grow, newer coalitions have been established primarily in developing countries where i) the services sector is still relatively young, ii) attention is often highly concentrated (e.g. tourism) and iii) stakeholders otherwise lack broad economic influence (the latter despite the sector's often dominant economic role). In these instances, even if only to become effective lobbyists, these coalitions have had to take on a significantly larger role that incorporates activities such as:

- awareness building towards understanding general concepts of trade in services and issues relating to trade in services negotiations, both vis-à-vis their membership and the wider public;
- developmental activities with respect to enhancing the competitiveness of service companies, service associations and services sectors;
- trade and export promotion activities such as the collection and dissemination of export opportunities, services data, international matchmaking and the facilitation of services trade missions;
- networking facilitation and partnering events; and
- lobbying and advocacy initiatives as they relate to domestic/regional/international policy and regulatory reforms, as well as trade negotiations.

In this respect, coalitions in developing countries are taking a

greater role vis-à-vis building capacity in their members across a range of services issues, *often substituting where government institutional processes may be deficient*. This might include for example, taking the lead on a consultative process that should occur between the government and private sector before the initiation of a negotiation. Similarly it might focus on targeting interventions to address key supply-side constraints and other trade promotion-type activities – which are of particular interest to operators concerned primarily with their day-to-day bottom line. In this way, a coalition can function as a more robust business support organisation (BSO).

Despite this important shift in their role on the ground, there is still a tendency in both the trade and donor communities to use the developed country coalition as the reference point. This is particularly problematic in how it often feeds into the elaboration of projects by international agencies. The under-appreciation of the significant differences between coalitions in developed and developing countries encourages the continued emphasis on the role of promoting services liberalisation, to the detriment of the more practical issue of generating services exports (and thus translating hypothetical opportunities into concrete jobs, income generation and ultimately poverty reduction). Furthermore, beyond advocating on services negotiating positions, active engagement on policy and regulatory reforms (helping to lay the groundwork for their operation and hence both firm and economy-wide competitiveness) is also essential to help turn market access on paper into market activity in practise.

It is worth noting here the very basic level of education and awareness-raising that a developing country coalition must undertake (in particular as compared to the likes of developed country coalitions). For example, the membership of USCSI comprises large, multinational companies that have little in common with the typical CSI member in a developing country (which is often either a micro or small service company (MSMEs) and/or representative thereof, with at best limited experience

in services exporting). While the USCSI members are seeking to expand their market share internationally and will therefore contribute very specific offensive requests with respect to negotiations and/or policy, members of coalitions in developing countries (or prospective members) often understand little of technical trade in services issues, when they participate in the process at all.

There may also be insufficient knowledge and analysis about which services sectors to support and which to liberalise – given also the possibility of conflicting interests between services sectors that are already well established, those that have potential, and those that are uncompetitive or undersupplied. In general however the interest and/or ability of developing countries to export services is weak, leading them often to adopt the most defensive measures possible to protect their national market share. Not to discount those with a strong grasp of the issues and their respective positions, but this has the potential to become a situation where the absence of information and knowledge results in fear of the unknown and thus a default defensive position. It is also a testament to the need for the government to retain their role as the final arbiter in determining the broader public interest that could result from possible policy reforms (including liberalisation).

As the coalition movement continues to grow in the developing world, it is essential that the differing needs outlined above form a renewed premise of support from the international community (public and private). The focus should be on facilitating practical measures that will result in actual services trade flows, while at the same time addressing the deeper constraints that could be inhibiting such flows (i.e. the policy environment, negotiations and in particular supply-side constraints).

THE CARIBBEAN EXPERIENCE WITH SERVICE COALITIONS

The idea to establish a coalition of service industries in the Caribbean was first introduced at a CARICOM/UNDP regional workshop on trade in services in Jamaica in 1997. The coalition proposal was raised in the context of developing strategies to prepare the region's private sector to meet the challenges and opportunities that would be presented in the rapidly changing global trade context.

After a steering committee was established, the Caribbean Export Development Agency commissioned a concept paper *Towards a Caribbean Coalition of Service Industries: A Concept Paper* (Gill 1999) which highlighted the rationale for a coalition in the Caribbean, examined other national coalitions, compared the national versus regional options and offered some guidance

towards the establishment of the organization. At a 2001 meeting of the CARICOM Council of Trade and Economic Development, a regional services sector development plan was agreed upon by CARICOM Heads of Government. The plan included the establishment of national coalitions in each member state as well as a regional coalition. The CARICOM Secretariat was consequently mandated to support the formation of these organizations.

The CARICOM Approach: Principles and Models

The CARICOM Secretariat began the process of support for the formation of national coalitions by outlining twelve objectives based on the needs of the various stakeholders. Ultimately the emphasis for the CARICOM Secretariat regarding the proposed functions of a coalition was twofold: the organization's role in serving as a private sector voice and focal point both vis-à-vis the various negotiation processes and in the development of trade policy, as well as promoting high professional standards.

The twelve objectives of a national services coalition proposed by CARICOM are as follows:

1. to provide the service providers with knowledge of export opportunities;
2. to organise trade missions to identify and exploit market opportunities;
3. to encourage service providers to engage in developing export programmes and promotional activities through collaboration locally, regionally, and internationally;
4. to promote the further development and competitiveness of the services sector;
5. to ensure that the highest industry standards are met by all service providers;
6. to educate the service providers on relevant aspects of the CARICOM Single Market and Economy, Free Trade of the Americas, World Trade Organisation, African-Caribbean-Pacific/European Union, and any other trade agreements or developments that can affect trade in services;
7. to educate service providers on relevant Government policies that can assist or hinder the export of services;
8. to represent the interests of the services sector, including lobbying Government and promoting fair multinational rules for trade in services;
9. to promote the organization of non-organized service providers;
10. to advise government on market conditions/trends with a view to implement/relax policies to protect local

- practitioners;
11. to encourage strategic alliances/partnerships with regional and extra-regional counterparts; and
 12. to ensure that factors such as population, GDP, size of country and educational resources are contemplated during the implementation of CSME.

Understanding the resource constraints of its members and seeking to avoid duplication of efforts and inter-agency jostling of roles and responsibilities nationally, the CARICOM Secretariat proposed four models for a coalition based on differing relationships with the national chamber of commerce.⁶ The four CARICOM-proposed models are:

National Chamber of Commerce - professional service associations are encouraged to join the national chamber of commerce resulting in an enhanced chamber that would also perform the functions of a coalition;

Stand-Alone National Coalition - professional service associations join a new stand-alone body to form a national coalition of service industries and the relationship with the chamber of commerce is limited;

National Coalition with Chamber of Commerce - professional service associations join a new stand-alone body to form a national coalition of service industries and this new coalition joins

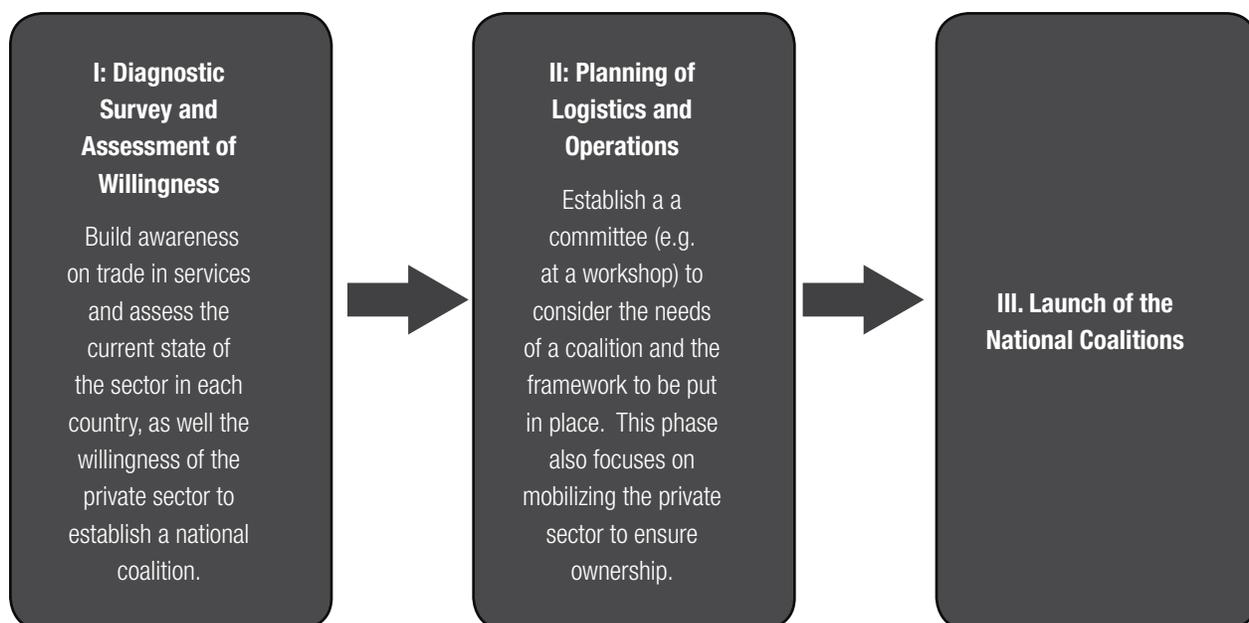
forces with the chamber of commerce creating an enhanced chamber of commerce;

Cooperative Arrangement with Chamber of Commerce - professional service associations join a new stand-alone body to form a national coalition of service industries and this new coalition remains distinct from the chamber however establishes a cooperative arrangement to meet national objectives with minimum duplication of efforts.

A key consideration therefore for each CARICOM country was the relationship between a possible new organisation and the existing national chamber of commerce, including whether the chamber itself had the capacity to follow services-related issues to the extent needed.⁷ Indeed such an assessment will also prove essential for new developing country coalitions as they seek an appropriate location within the existing landscape of actors. Preliminary experience in sub-Saharan Africa (see below) confirms that such considerations can create significant obstacles to gaining traction on the launch of a services-centric body and/or mechanism at the national/regional level.

Having put forward baseline objectives and four models of engagement with the national Chamber, CARICOM subsequently devised a three-pronged methodology that was then applied on a country-by-country basis (see Figure 1).

FIGURE 1 – PHASES IN THE CARICOM APPROACH



⁶ See http://www.caricom.org/jsp/single_market/services_regime/models_national_services_coalition_estab.pdf
⁷ The models assumed the Chamber was functioning at a sufficiently adequate level for this to be a consideration

BOX 2 – PHASE 1 OF THE BARBADOS COALITION OF SERVICES INDUSTRIES*

With imminent negotiations expected under the proposed FTAA, and against a backdrop of the declining importance of agriculture and manufacturing coupled with the shock to the tourism sector resulting from World Trade Centre bombing in 2001, the Barbados Coalition of Service Industries (BCSI) was formed in November 2002 – backed with financial support from the government.⁸

The mission of the BCSI (during phase 1) was “to foster the international competitiveness of Barbados’ services sector”, while objectives covered the promotion of standards, education and awareness

(of trade agreements, government policies or issues), a representational and lobbying role and to provide service providers with knowledge of export opportunities and to promote export activities.

In terms of membership the BCSI is responsible for the ‘non-traditional’ services sector: this means that the organization represents all sectors except for the tourism sector directly (as in hotels) or the offshore financial sector. The rationale is that there are other established agencies in Barbados that represent the interests of these sectors, and that one of the objectives of the BCSI is to diversify

the services sector away from those two mainstays. During phase 1, there were two categories of membership: ‘Association’ and ‘Individual/Company’ (available only for companies not represented by an association).

With regard to its strategy, BCSI focused on four core priorities each assigned its own ‘unit’: education and communication, development, export promotion and lobbying. Table 3 summarises these priorities alongside some of the main activities.

TABLE 3 - BCSI PRIORITIES AND CORE ACTIVITIES (BY UNIT)

1. EDUCATION: Communication and awareness-raising about services	2. DEVELOPMENT: Building the capacity of services exports	3. EXPORT PROMOTION: Facilitating market opportunities through networks	4. LOBBYING/ADVOCACY: Representing stakeholder views on policy/negotiations; also member relations
<ul style="list-style-type: none"> • Distributing info on trade in services to BCSI members/public • Maintaining and developing the website& member databases • Preparing print and e-newsletters • Developing and enhancing BCSI’s public relations at home and abroad • Developing and enhancing communication / marketing tools 	<ul style="list-style-type: none"> • Developing interventions to enhance the services sector’s export readiness and competitiveness • Developing interventions to enable service providers to achieve international standards • Collaborating with partners on service sector development • Developing an awards/ recognition programme to highlight achievements of successful members 	<ul style="list-style-type: none"> • Organizing services trade missions • Developing and refining a services trade mission model • Participating in trade shows • Organizing other export promotion events for the services sector • Providing service providers with export opportunities 	<ul style="list-style-type: none"> • Managing the AISU (see below) • Lobbying on behalf of service associations / providers • Assistance to establish/ strengthen service associations (SAs); • Managing the relationship between SAs and BCSI • Oversight of the quarterly members meetings • Obtaining positions from SAs and sectors on behalf of the BCSI and other organizations • Making proposals on behalf of SAs to strengthen the sector
CORE PROJECT:			
The Flying Fish Newsletter	Service Exporters Certificate of Excellence Programme (SECEP)	Trade Missions	Association Incubation and Support Unit (AISU)

In terms of delivering concrete results, it is worth noting that each unit at BCSI had a core project. For example under ‘Lobbying and Advocacy’, a key element of BCSI’s work centred on the Association Incubation and Support Unit (AISU), which assisted service associations to function at greater capacity by providing administrative functions (such as email and correspondence services, database and record management, and even a location for board meetings). Under the banner of ‘Development’, BCSI ran the Service Exporters’ Certificate of Excellence Programme (SECEP), a training programme designed

to enable potential service exporters to expand their business ventures in markets outside of Barbados.

The BCSI also offered significant support to the regional CSI movement, notably in compiling a ‘Coalition Starter-Kit,’ which includes a collection of useful documents as well as proposals for first year budgets, bylaw suggestions and staff job descriptions.⁹ BCSI has also been instrumental in formalising the Caribbean Network of Service Coalitions (CNSC).

In June 2011, BCSI undertook a restructuring,

organizational review and assessment of its operations and strategic vision. It has since re-launched itself on this basis as of January 2012, with an enhanced emphasis to promote national economic growth driven by new and emerging service industries, the creation of new business opportunities in the service industry and preparing domestic industries for exporting to traditional and new markets.

* - Phase 1 of BCSI’s operations covers up to its re-launch in January 2012. Additional details are forthcoming on their website - <http://www.bcsi.org.bb/>

⁸ Having emerged from the Ministry of Economic Affairs-led Professional Services Export Committee, BCSI benefited from a Government of Barbados grant of USD\$125,000 in 2003-04, with subsequent grants ranging in size from USD\$325,000 to \$600,000.

⁹ See www.c-csis.org/startupkit.php

IMPLEMENTATION CHALLENGES AND GENERAL LESSONS FROM THE CARIBBEAN

The planning and implementation of the Caribbean coalition strategy has taken far longer than envisaged. By early 2010, while eight of fifteen CARICOM member states had technically 'launched' coalitions, only four could have been considered operational (St. Lucia, Trinidad and Tobago, Jamaica and Barbados. The Barbados coalition (BCSI), which was one of the first established in the region, stands out as a notable leader in this respect (alongside the Trinidad and Tobago Coalition of Service Industries) and is featured in Box 2 [page 15]).

Despite some recent successes (see below), the initial phase of implementation of service coalitions in the Caribbean has proved difficult. The reasons have been varied. One obstacle has been that in the developing country context, awareness and understanding on issues related to services policy, negotiations and even trade promotion are low, including for those engaged in the sector itself. As such, the private sector has been challenged to clearly articulate their needs from a service coalition and in particular, they have been unable to effectively consider the horizontal support that may be required.

A second key problem during the early experiences was that the choice of where to locate coalitions was skewed: aside from assumptions over the capacity of various potential bodies, choices on coalition models in the Caribbean were largely based at the time on the politics of relationships between the private sector and the Chamber. It is interesting to note that Chambers have largely been removed from the equation in the current context. Lastly, the lack of adequate and consistent funding sources for the coalitions and a strong push from the respective Governments has resulted in delays.

Such national challenges (notably with respect to funding) were mirrored at the regional level, which until late 2010 had managed little meaningful formal progress. Informally however, some tangible activities stemming from regional collaboration included the lobbying of the CARICOM Secretariat for comprehensive inclusion at the first regional CARICOM Services Symposium¹⁰ that took place in Antigua in 2009 and a lobbying effort to relevant UK officials regarding the rejection of the proposed Air Passenger Duty. Another lobbying effort targeted the situating of national coalitions as focal points for CARICOM with respect to all services initiatives.

Box 3 [next page] highlights some of the more recent progress in the CSI movement in the Caribbean. This progress notwithstanding, some general lessons from the early experiences can be highlighted.

To be effective in the formation of coalitions in the Caribbean, the private sector needs to have a much better understanding of its national context as it relates to trade in services, as well as of the coalition movement regionally and internationally. This includes understanding how best to situate itself in the existing landscape of business support and membership organisations. There also needs to be a firm understanding of the position and level of support, both financial and otherwise, being offered to the national coalitions by their respective governments and other donors and supporters. Indeed the correlation between the recent progress and the securing of meaningful resources should not be underestimated.

Some additional specific lessons from the Caribbean include:

- It is critical to secure buy-in and active support from the government. All Ministries should be well aware of the importance of the service sector and the work of the organization and should seek to consult the coalition on any service-related initiative.
- It is important to have a government representative on the Board of the coalition to help raise awareness of its existence and role, as well as to build support within government.
- As it relates to funded-projects, the coalitions should not be passive participants, but active contributors, from project conceptualization onwards and where project funding is available, the coalitions should provide consultancy services and other related services to help ensure sustainability of the organization. In this respect, the coalition has the potential to serve as a valuable conduit for the design and implementation of aid-for-trade projects.
- Trade in services in a relatively new area. Board members might require training in certain areas upon assumption of their role and staff, who are actively engaged with the service sector, should be consulted on coalition initiatives.

Finally, while efforts advance to launch national coalitions, the importance of regional-level efforts should not be dismissed. We note again the correlation between the recent establishment of the Caribbean Network of Service Coalitions and the enhanced momentum at the national level. In that the CNSC is providing backstopping support to nascent and emerging national coalitions, such regional work should be viewed as a positive development at both the national and regional level. Such a two-track approach to coalition formation could serve as a useful model in other developing country regions.

BOX 3 – RECENT UPDATE ON CSIS IN THE CARIBBEAN

In December 2010 a group of national champions from the region convened to formally inaugurate the Caribbean Network of Service Coalitions (CNSC). At least at the outset, the CNSC aims to raise awareness on services issues, including joint lobbying and advocacy efforts; generate support at national and regional levels for the coalition movement; and share best practices. A new website has been established at <http://c-nsc.org>, which provides a range of services, including regional services news, member information, networking and business opportunities and a host of useful coalition resources. CNSC has also just launched a new flagship publication – *Services Scoop* (see <http://c-nsc.org/services-scoop/>). Further progress has also been made through the strengthening of existing coalitions in Barbados, Dominica, Saint Lucia, and Jamaica (notably via additional funding and increased staffing), as well as the 2011 launch of the Antigua and Barbuda CSI and the 2012 launch of the Grenada CSI. This raises the total number of functioning and staffed coalitions to seven. Support for these efforts have been provided by member governments, alongside GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH), the Caribbean Export Development Agency and the DFID-funded Caribbean Aid for Trade and Regional Integration Trust Fund (CARTFund).

COALITION BUILDING IN SUB-SAHARAN AFRICA

This section provides a glimpse into select efforts underway in sub-Saharan Africa (SSA) to establish service coalitions. Offering a flavour of some of the progress achieved and challenges being faced, it draws on recent activities in which ILEAP has been involved, notably in East Africa, as well as to varying degrees in West and Central Africa (see Box 4 for additional details on ILEAP's support to CSIs in SSA).

Uganda Coalition of Service Industries

The Uganda Coalition of Service Industries (Uganda-CSI) was born in late 2009 out of the Uganda Services Exporter's Association (USEA).¹¹ USEA, as one of the earliest CSI-type organisations in SSA, was itself formed in 1998 as the outcome of an ITC-sponsored workshop organised by the Uganda Export Promotion Board (UEPB). USEA was also constituted through the Private Sector Foundation Uganda (PSFU), of which it is a member. Aside from providing background, this brief history serves immediately to highlight the challenge of situating a services-centric body/mechanism within the existing landscape.

Uganda-CSI aims to serve as the advocacy and export support platform for Uganda's service industries. As USEA, it was designated in 2005 as Uganda's WTO National Enquiry Point on Trade in Services by the Ministry of Tourism, Trade and Industry (MTTI) and serves as a member of the government's Inter Institutional Trade Committee. As a member of Private Sector Foundation, they also chair PSFU's Working Group on Trade. Despite however these and other laudable achievements, Uganda-CSI (and USEA before it) has been unable to take the critical steps required to shift from ad-hoc activities and influence to a more systemic role as a fully functioning and robust service coalition.

The obstacles for doing so mirror in many aspects those recounted earlier in the Caribbean context – notably the lack of financial resources needed to establish a functioning coalition (i.e. hire staff, develop and implement programmes, undertake outreach, etc.). While the government has been supportive in principle, as an African LDC, the possibility of providing meaningful financial support to underpin expanded activities has not been possible. As noted above, situating Uganda-CSI within the existing landscape – which includes both the Uganda National Chamber of Commerce and Industry and the PSFU – has brought additional logistical and political hurdles. A key challenge has also been the ability to craft an innovative service offering that demonstrates clear value-added to potential beneficiaries and donors (which is itself hampered by a shortage of resources to elaborate a compelling strategy).

EACSI

The idea of a regional coalition in the EAC emerged out of a collaborative work programme between the East African Business Council (EABC) and ILEAP. During a February 2009 regional sensitization workshop with the private sector (on developing services export opportunities in the context of EPA discussion),¹² stakeholders identified the potential need for such a regional coalition, which could, amongst other things, bring relevant national private sector associations together and facilitate coherence in their research, policy and lobbying efforts, as well as trade promotion more generally.

Stakeholders reconvened in October 2009 on the basis of a preliminary scoping paper undertaken by the EABC/ILEAP Fellow and colleagues.¹³ Stakeholders from across the region were thus able to raise their awareness about the potential role of service coalitions in pursuing services reforms and negotiations, as well

¹¹ See http://www.ileap-jeicp.org/programmes/meetings_workshops/uganda_sept09.html for details.

¹² See http://www.ileap-jeicp.org/programmes/meetings_workshops/nairobi_feb09.html for details.

¹³ See Yegella, Chaytor and Primack, 2009 (subsequently revised, 2010).

as to promote information and knowledge sharing regarding national/regional experiences (in Africa and from abroad). As a result of these deliberations, stakeholders formally called for the formation of an East Africa CSI and the convening of a steering committee to help guide its elaboration.¹⁴

Building on this, EABC and ILEAP organized a first meeting of the interim steering committee in July 2010.¹⁵ Here stakeholders were able to discuss a wide array of strategic, technical and administrative issues – i.e. a draft mandate and mission statement, objectives, priority activities and sectors, as well as organizational structure and membership criteria (many of the same issues enumerated in general terms in Section 4 below). Stakeholders also outlined a road map for bringing the coalition to fruition, the core of which was raising awareness on the value of a regional CSI and securing the requisite resources to initiate operations (which would be spearheaded by EABC, with assistance from ILEAP).

Notably, during their deliberations stakeholders concluded that the establishment of a regional CSI need not wait for the establishment of national CSIs in the respective EAC Partner States. The rationale was that fast tracking a regional CSI was needed in order to ensure a regional private sector voice in the on-going intra- and extra-regional trade negotiations underway (notably the Common Market Protocol and those expected at the time under the EPA). In this respect, the intensive drive towards regional integration was leaning stakeholders to support a regional mechanism as a matter of priority. In parallel, the stakeholders also agreed for the regional body to prioritise support to the establishment of national coalitions, platforms and/or related mechanisms.

Due to a confluence of personnel and organizational circumstances, the momentum behind this work slowed in late 2010. This was exacerbated by the challenge of securing adequate donor support to make a concerted move into the implementation phase.

In early 2011 however, the multi-donor TradeMark East Africa (TMEA)¹⁶ agreed to support the development of a 'Professional Services Platform' to be housed at EABC. Building on the original EABC-ILEAP work, the proposed Platform would function as a sector-specific quasi-coalition, offering the opportunity to take forward the core ideas in a sector-specific context. Recognising the value of sequentially building towards a fully-fledged coalition, stakeholders at the first strategy meeting for the Platform emphasized the importance of situating it as a strategic process towards the establishment of the regional coalition. While much remains to be done to bring the EACSI to fruition, the Platform

(to be launched in mid-2012) constitutes an important stepping stone (and key tangible outcome).

This experience serves to highlight again the importance of ensuring adequate and broad-based awareness on the potential value-added a coalition can deliver – both amongst potential beneficiaries in the private and public sector, but also amongst the donor community. A common thread in this instance, as elsewhere (at least initially in the Caribbean), has been the challenge of generating interest within the donor community. One possible contributing factor is the relatively lower levels of available government resources in a region with mostly LDCs, wherein governments are not in a position to subsidise activities in a way that might also crowd-in needed external support (as was often the case in the Caribbean). This particular context highlights the role aid-for-trade financing could play in overcoming such obstacles (as indeed the initial TMEA support represents).

Elsewhere in SSA

Drawing again from those activities in which ILEAP has been involved, additional efforts can be cited for reference purposes. These include completed and/or on-going stakeholder mapping exercises and related support in Ghana, Cote d'Ivoire, Congo (Brazzaville) and Burundi. The authors are also aware of regional efforts in COMESA, including under the COMESA Business Council (CBC), to establish a regional service coalition.

BOX 4 – ILEAP'S SUPPORT FOR COALITION BUILDING IN SSA*

Over the past few years, ILEAP has been providing advisory support and capacity building to private sector stakeholders in West, Central and East Africa who are interested in forming a service coalition. These efforts have focussed in particular on assisting these stakeholders to better understand the national/regional landscape vis-à-vis existing BMOs/BSOs. In undertaking a stakeholder mapping, this work has attempted to identify precise roles (or deficits) where a coalition-type mechanism might best engage. It has also attempted to understand the institutional decision-making process prevalent in the particular country/region to know how better to engage. In this sense, ILEAP has sought to promote intra-regional, intra-African, and intra-developing country experience sharing (the current paper, and earlier drafts, constituting a key mechanism for doing so). With enhanced evidence on potential needs and strengthened capacity to articulate those needs, ILEAP's work thereby helps to lay the foundation for 'crowding-in' donors who can adequately support the further refinement of a strategy and business plan, and make the shift towards implementation.

**ILEAP acknowledges support for this work from the International Development Research Centre (IDRC Canada); the Canadian International Development Agency (CIDA); and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.*

PART 4 – ESTABLISHING COALITIONS

While every country or region is unique, and no single model would be appropriate for all, this chapter outlines some key areas of consideration for those interested in starting a service coalition (notably in a developing country). It includes step-by-step suggestions on a host of issues that are likely to require attention as part of establishing a new coalition, as well as some detailed considerations on ‘nuts and bolts’ issues (e.g. membership criteria, voting, governance, etc.). Additional reflections are also provided on the issue of coalition sustainability, as well as the relationship with government and the relationship between national and regional entities.

A useful starting point for thinking about coalition building was originally outlined in an ITC-commissioned paper from then-head of the Association of Professional Societies in East Africa (APSEA).¹⁷

1. Be guided by need and purpose;
2. Individual member’s needs should converge at the coalition;
3. Committed and effective leadership are a must;
4. Governance structures must be formalized and institutionalized;
5. Maintain a clear strategic plan to guide activities;
6. Ensure benefits to members outweigh cost of membership;
7. Maintain a sound financial and management system;
8. Develop an effective communication strategy;
9. Build networks and alliances;
10. Remain relevant.

A word of caution before entering into the details – experiences in both the Caribbean as well as some in Africa have demonstrated that attempting to launch a coalition before formalising many of the structures and procedures touched on below can significantly raise the risk of failure.

KEY STEPS TO FORMING COALITIONS

1. IDENTIFY A CHAMPION

- Ideally both a private and public sector champion should be identified.
- The role of these persons would be to generate support for the establishment of a coalition, including financial support from corporate sponsors and donors.
- The champions do not need be the same person as the

drivers (those persons who adopted the idea or who are doing the groundwork; see below).

- The champions should have a clear understanding of the roles and possibilities of a coalition, in order to be effective at conveying the need to establish the organization.
- They should be leaders, credible and persuasive – with the ability to deliver their message at a reasonably high political level.

2. ASSESS WILLINGNESS OF PRIVATE SECTOR

- Depending on resources, host a forum or visit all professional associations and leading services companies. Discuss the role of the coalition to a far-reaching audience.
- Gather information regarding the challenges of services sectors and service providers both nationally and with respect to exporting.
- Gather feedback on the types of offerings a service provider would wish from a coalition.
- Consider inviting a representative from an existing coalition to discuss their own success and to generate enthusiasm at a discussion forum.
- Ensure buy-in on the importance of the coalition.

3. IDENTIFY A DRIVER

- Identify drivers, if none have been identified. The role of these persons will be to do the groundwork for the coalition. Strong technical competency for the driver is invaluable.
- The role of the drivers will include conducting surveys, organizing meetings, developing initial databases, conducting research and generally supporting the champions.

4. PLANNING OF LOGISTICS AND OPERATIONS

- Establish a medium-sized (7-8 persons) taskforce ideally comprised of representatives from the government, key trade associations (e.g. legal, accounting, engineering), large services companies, and champions of national leading services sectors.
- Review coalition best practices.
- Determine a name, mission, objectives, and core values.
- Determine membership categories and criteria.
- Prepare bylaws for the organization that will outline governance structures, voting procedures, membership categories and criteria (see more below).
- Determine the core activities of the coalition (emphasising

perceived and potential needs).

- Discuss the benefits for each of the stakeholders. As above, be sure that the benefits of the coalition outweigh the costs. Developing country coalitions should consider benefits in addition to 'a voice for the services sector' and include benefits that can more directly result in increased services trade, exports, earnings and market share.
- Prepare a short-term action plan for the coalition, but be flexible for changes that will inevitably arise.
- Locate office space. Consider utilizing space at the national Chamber of Commerce or request office space from the Government, if no funds for such expenses are available.
- Consider structure and staffing. A coalition must have at least one professional staff to function effectively (i.e. 'the driver').
- Consider seeking advice from other coalitions and organisations providing technical support in this area (e.g. CNSC, ILEAP, GIZ, the Commonwealth Secretariat, etc.).

5. SECURE FINANCIAL SUPPORT

- Prepare an information package and funding proposal to secure financial support. This can include seed funding to take the initial steps required to pursue longer-term funding. At a minimum, include financing for a manager and an assistant and the funds necessary to undertake an aggressive PR campaign, which should seek to raise awareness of the role of the coalition and build support for the organization.
- Reach out to both public and private sector actors, including large services firms operating in the country/region, the local government, bilateral and multilateral donors, private philanthropic bodies, etc.
- Secure at least 3 years funding before launching a robust work programme (ideally 5 years). The rationale here is that without a solid base to scale up activities over the first 3-5 years, it will be very challenging to garner the requisite credibility and trust of beneficiaries. On the contrary, to launch prematurely and risk damaging the perception of the coalition's potential can inflict long-term damage on future potential achievements.

6. FORMALIZE

- Before launching the coalition ensure that all procedures are formalized, with special attention to membership procedures. It is essential for the CSI to have a professional tone from the outset and not appear to be driven by the ad-hoc interests of the main drivers. Formalising procedures

minimises the possibility of the latter and strengthens the perception around the CSI's ability to deliver as an organisation.

- Consider a Memorandum of Understanding to govern the relationship between service associations and the coalition. The MOU should cover the general scope of the relationship (what the coalition will do/what the association will do) and outline topics such as the assignment of association point persons, terms for sharing information with the coalition following AGMs or changes in contact details.
- Ensure that important trade in services data is captured from Individual/Company members as part of the membership procedure of this category. This process avails the ideal time to commence both a qualitative and quantitative survey of services providers (data that will prove invaluable for the CSI to properly target effective services and support to its members).

7. DEVELOP A COMMUNICATIONS STRATEGY / PUBLIC RELATIONS

- One of the most important roles of a coalition is public relations. Trade in services is not well understood and the sector is diverse and fragmented. While the usefulness of a manufacturing association or agricultural association will not be questioned, the role of a services coalition will be. It is thus very important that the message of the coalition and of the services sector is consistent and frequent, raising awareness about the importance of services, the role of a services coalition in particular and the intention to launch a coalition in the country/region of interest.
- Early and targeted newspaper articles can help to stimulate discussion and generate needed attention on services issues (including by helping to attract financial resources).
- Develop a website and brochure that explains the role of the coalition, membership categories and procedures and outline clearly and comprehensively the member benefits for both individual/companies and service associations.
- Communicate with prospective members and the media often and effectively;
- Build strong relationships with the media – invite them to all coalition activities;
- Issue regular press releases and e-newsletters, and be sure to report success stories;
- Update the website in real-time (keep available material relevant);
- Find other effective communication mechanisms, e.g. Twitter or Facebook.

- Collect feedback from members via online surveys;
- Consider eventually hiring a staff member specifically responsible for public relations and awareness building.

8. LAUNCH THE COALITION

- Host a large coalition launch.
- Invite key public and private sector leaders.
- Invite national business support organizations.
- Invite national and regional media and ensure some articles on relevant issues appear prior to the launch (see also communications strategy above)
- Secure high-profile public and private sector speakers
- Prepare speaking notes regarding the importance of the services sector and trade in services for the speakers.
- Prepare a press kit for the media with a press release, brochure, etc.

9. COALITION FUNCTIONING

- Host a General Meeting.
- Adopt by-laws.
- Elect a Board of Directors.
- Appoint Government representative to sit on Board.
- Incorporate the organization.
- Hire at least one paid professional staff.
- Ensure sound financial management systems. Consider adopting a project-based accounting approach.
- Monitor. Evaluate. Report. Learn. The coalition will be called on repeatedly to defend its existence, especially if it relies on external funding.

OTHER 'NUTS AND BOLTS' FOR ESTABLISHING A CSI

The following sections delve into further details on a number of 'nuts and bolts' issues, such as determining membership criteria and the allocation of voting rights, as well as some management and governance related matters.

Membership

Three classes of membership can be considered: Association, Company/Individual and Affiliate.

Association: This is a category of service associations – guidelines for membership criteria may include:

- Associations should be registered at a minimum, but ideally seek to become incorporated: this is to ensure that associations have legal identities. While it is best practice for associations to incorporate, associated fees and length

of time can deter them. At the early stage of building the coalition and encouraging service sector focal points, registration may suffice.

- Associations should have standards for membership and therefore not function simply as a 'club' of interested persons. Associations should be encouraged to adopt the highest international standards, both to ensure competitiveness of the sector and potentially underpin future mutual recognition of qualifications so as to enable greater services exports abroad.
- Associations should be obliged to host an Annual General Meeting in every two-year period. This is to ensure that a defunct coalition no longer shares voting privileges.
- Associations should have at least three members. This is to ensure that an individual does not form an association in order to obtain voting rights or to serve on the Board.

Generally associations have very limited resources and as it is in the coalition's best interest to work closely with these service sector focal points, consideration may be given to waiving membership fees for this category of membership. Instead, fees can be sought from the larger Individual/Company Membership category, while associations pay for unique services being offered, such as membership in a Barbados CSI-style Association Incubation and Support Unit.

Company/Individual: Anyone with an interest in providing services may potentially be a candidate for becoming a member in this category, however consideration should be given to the potentially undermining impact on sector associations of allowing individuals. There is also some debate as to whether coalitions should be strictly Association-based or also allow Company/Individual members, but the advantages of allowing the latter include: the availability of additional membership fees and additional trade data; the fact that individual service associations may be weak or may not serve interests well (perhaps also due to the fact that a company covers several sectors); and the principle that companies are free to join associations as they see fit.

More generally, a well-functioning coalition should not replace or draw potential members away from sector associations, but rather demonstrate why being a member of such an association would be even more valuable. Coalitions can add value by helping associations form, assisting them in membership recruitment, and strengthening them to play a more meaningful role in national development and export promotion and empowering them to lobby more effectively on behalf of their members. Coalitions can also encourage and support sector-specific training or initiatives conducted by relevant associations. The coalition can also

perform its lobbying and advocacy functions through the relevant associations, thereby encouraging Individual/Company members to use this channel.

Affiliate: Thirdly, to avoid duplication of efforts, poor inter-agency communication and potential tensions, a formal relationship with national/regional business support organizations, the chamber of commerce and academic institutions can be considered

Voting Rights

The voting rights of the organization need to be given serious consideration. While it may appear most logical and easy to simply assign such rights only to service associations on a one vote-per-association basis, this is not necessarily the best solution. It may instead be important to ensure that all members (including Individual/Company members) feel included in decision-making processes, and also to create mechanisms that secure the valuable input of exporters that have achieved success in developing strategies, entrepreneurial skills and innovation for selling services abroad.

In this respect, points of consideration may include having a fixed number of Individual/Company members to serve on the Board, or a possible weighting of votes (e.g. from a small association versus a large association or from an Individual/Company member versus an association). It is important to recognize that governance elements such as this may require fine-tuning as the CSI evolves and grows.

Board of Directors

As trade in services is still a relatively new realm and its impact far-reaching and dynamic, a Board of Directors comprised solely of representatives from service associations is not necessarily ideal, as it may not encompass the wide skill set required to manage the myriad of services-related issues and guide this new type of organization forward. Instead, the composition of the coalition's Board of Directors should ideally be drawn from a variety of sources – including associations and individual operators, as well as possibly public sector representatives and even academia. Candidates might therefore include:

- influential persons who can encourage government support, financially and otherwise, as well as ensure robust private sector participation;
- practitioners, not necessarily representatives from associations, who have experience in exporting/trade promotion, as well as policy development and/or services negotiations;
- sectoral leaders who can help devise sectoral strategies to

enhance competitiveness;

- an influential government representative who can raise awareness about the coalition across Ministries/ Departments/Agencies, and work to ensure that the services sector remains a high concern for the government and to actively support the continued funding of the organization.

The Board's role vis-à-vis the coalition secretariat should also be clearly defined. As much as possible, Directors should not be involved in the day-to-day management of the coalition. The Board should establish general policies and strategies for the organization. The Board should also be responsible for funding and should interface with the government and other funders on a regular basis.

Committees

Committees should be established with a mix of Board representation and well-qualified members to ensure relevant and valuable input. No committees should be established for the sake of establishing a committee if suitable committee members are not also identified. Committees require clear and achievable terms of references and objectives. Particular areas could include fundraising, public relations, member expansion, trade/export promotion and lobbying, as well as those along a sectoral and/or activity-cluster basis.

THE ISSUE OF SUSTAINABILITY

The issue of organisational sustainability is invariably one of the greatest challenges for a coalition in a developing country. This is due to the fact that:

- the private sector often does not clearly understand the services sector or the opportunities in trade in services (and hence do not see the value of the coalition);
- government is typically attached to the agriculture and manufacturing sectors;
- the emphasis on services is often policy or negotiation related (with inadequate attention to helping existing or potential services providers produce/export more services);
- the full benefit of a coalition is poorly understood with few well-known successful developing country models to refer to;
- convincing a government, donor or private firm to provide financial support requires overcoming the above challenges, and developing into a financially self-sufficient body requires demonstrating to your beneficiaries that your services are worth paying for.

To overcome these challenges:

- The benefits of a coalition vis-à-vis all the stakeholders need to be clearly and comprehensively defined in all promotional materials.
- The services that the coalition provides to the government need to be clearly explained and demonstrated. Consider how existing coalitions can assist in advocating to the government, for example support from the Global Services Coalition (GSC) for establishing a coalition by way of a lobbying letter.
- Establish a fundraising committee of high profile business persons that will be able to encourage the business community to support the coalition.
- Generate funds wherever possible. Consider corporate sponsorships for activities. Charge break-even fees. Barter services wherever possible.
- Host a regional or international event to generate brand recognition and funding. Consider partnering with relevant international institutions (e.g. ILEAP, GIZ, ITC, UNCTAD, etc.)
- Encourage funding agencies, government, regional bodies to consider the coalition in undertaking consultancies. Prepare a profile to reflect this line of activity.
- Develop publications for members, business support organizations or regional organizations.
- Consider activities that international funders would sponsor. Send proposals to these agencies.
- Consider a special category of members that would enjoy additional benefits such as USCSI's Chairman's Circle.
- Be creative. Consider for example, monthly business networking events or silent auctions with prizes donated from members.
- Undertake activities that are time consuming but not necessarily expensive – such as association building, lobbying, public relations, training.
- Conduct ongoing public relations activities to ensure that the work of the coalition is well noted.

One model worthy of consideration is that of EduNova, an umbrella body for Nova Scotia's education sector that aggressively pursues export opportunities on behalf of its membership, serving as a joint bidding mechanism and developing consortiums from within its membership to win bids. EduNova benefits from a fee in this effort from the project financiers.¹⁸

COALITION-GOVERNMENT RELATIONS

As noted earlier, a key requirement for the success and

sustainability of a coalition is securing – and maintaining – a strong and functional relationship with government. Indeed in many ways, the extent to which the coalition can fully take on the role as focal point for the services sector is dependent on the extent to which the government is willing to engage with it. Simply put, for a coalition to pursue a number of its main objectives, it will require an open and responsive government partner.

From the government's perspective, most notably in the developing country context, there are compelling reasons to seek such a collaborative relationship. Looking at the range of activities that a developing country coalition undertakes beyond the traditional 'lobbying for liberalisation', these are most often filling an institutional gap for services not being provided by government itself. For example, a coalition is most likely to find a need to provide services export and trade promotion activities where there is the absence of an effective government agency doing so in their sectors of interest. Similarly, the consultative mechanisms required by the coalition to underpin their lobbying on services trade negotiations, or even policy reforms, can serve to complement (or substitute) for government-led consultations with the private sector. Rather than seeing this however as a challenge to government's authority and role (ultimately they retain the decision-making power), such activities are arguably better undertaken by the private sector themselves and thus should be fully supported.

The latter view lends itself to take the argument one step further – that governments should be providing financial support to coalitions (though in reality, especially for African LDCs, this may not be possible). In this way, the government could view the coalition as an 'on-call consulting agency' that has both the most experience vis-à-vis the services sector and the best networks. The view could also be taken that the government is not simply funding a coalition, it is compensating a coalition for efforts that otherwise would have been carried out through consultancies or additional staff members. At least in principle, this should provide greater incentive for the government to regularly seek the coalition's input and feedback before coming to a decision. Moreover, assuming the capacity is there, the government might look first to the coalition when considering commissioning additional studies related to the services sector. At a minimum, when doing so, the coalitions' feedback should be actively sought in the development of such studies and projects.

In the Caribbean, this relationship is working with varying degrees of success. For example the BSCI has been working closely with the Ministry of Tourism and Ministry of Health in establishing a health and wellness tourism strategy, with the Ministry of Culture

in establishing policies and incentives for the cultural industries, and continues to comment regularly on various services-related proposals and initiatives. Such a relationship thus helps to ensure that the Barbados government is getting a good return for its investment in funding the BCSI.

On the other hand, a serious challenge has been observed in certain instances where coalitions are unable to fulfill their role as service sector focal points. While the situation is improving in light of recent process, it highlights the importance of CARICOM and national governments to mainstream the CSI-consultative mechanism. The more this can be formalised into the government's decision-making processes, the better.

THE NATIONAL-REGIONAL INTERFACE

An ongoing debate in the area of coalition building in developing countries relates to the national-regional coalition relationship, division of labour and whether a particular sequencing is preferable. The Caribbean approach was that national coalitions should first be established (and functioning) before coming together to form a regional umbrella body (in the current case a network of national coalitions rather than a separate entity itself). However, in some circumstances it may not be realistic to seek the full proliferation of national bodies before initiating regional efforts. Indeed it may make more sense to start at the regional level. The two-track approach that has emerged in practise in the Caribbean is instructive.

In his early CARICOM proposal, Gill (1999) stressed his own view that while national coalitions would clearly be helpful actors in the formation of a regional coalition, they should not be viewed as a pre-requisite. His main arguments revolved around the urgency of forthcoming services negotiations and thus the importance of bringing the private sector voice under one roof, alongside the view that pursuing a national-first-then-regional approach would result in lengthy delays. In practise this concern has been born out. At this point, with the greater prevalence and importance placed on regional integration, arguments for considering the regional option in parallel (or even first) are even more compelling today than they were ten years ago. Such moves are already underway, such as those in the East African Community (see above).

This is not however to say a regional coalition could substitute over the longer-term for a national coalition. Clearly a number of the key tasks that a national coalition might take on, would require a level of intimacy and knowledge at the national level that a regional coalition would be unable to provide. That said, a regional coalition could serve as a clearinghouse for regional information, and offer expertise on what types of support might be

needed nationally and /or on best practices. The early Caribbean experience is again instructive in that there has been a tremendous duplication of effort, both to launch national coalitions and develop services sectors themselves. Of note, the recent progress has been marked by greater regional collaboration, knowledge and experience sharing, as well as pooling of scarce technical and financial resources.

An illustrative list of roles a regional coalition might play would include:

- Information exchange—development of an information portal which might include national procurement opportunities, trade events, major conferences, international events;
- Funding opportunities – the regional body could submit proposals to funders targeting cross-border, regional activities;
- Strategic alliances – the body could assist with the establishment of regional collaborative partnerships and activities;
- Regional trade data – opportunity to collect regional trade data in a consistent fashion via surveys and application forms;
- Regional positions – opportunity to collect negotiation positions on a region-wide basis, thereby facilitating the role of the negotiators;
- Databases – opportunity to develop sectoral and skills databases across the region in a consistent fashion and apply this information in sector/cross-sector development initiatives;
- Export readiness – opportunity to assess regional export readiness consistently, to determine areas of greatest potential and apply strategies for harnessing strengths across the region;
- Network – platform to network and share ideas across the region;
- Coalition development – opportunity to encourage inter-coalition dialogue and to house information regarding the establishment and functioning of a coalition, including best practices

In terms of membership and governance of a regional body, a number of issues would naturally re-emerge (e.g. eligibility of national firms vs. 'association of associations'; Board representation of national interests in the absence of existing national coalitions; role for national public sector officials and/or regional public (and private) bodies [e.g. RECs]; etc). Answering these and other related questions however requires region-specific context, with knowledge on existing actors and organisations.

PART 5 – CONCLUSION

While the services sector is the cornerstone of modern economic activity, there is a disconnect between the recognised importance of services and the attention it receives by most actors. This manifests itself in policy, practise and resource allocation. This results from a variety of factors, including a widespread lack of understanding with respect to the services sector (inherent in such a broad scope of activity) and uncertainty with respect to harnessing the potential of services trade for economic development (itself exacerbated by the absence of accessible and reliable services data). This disconnect in importance versus attention serves to underscore the need for service coalitions (or similar services-centric mechanism) – which consist of organized service-sector stakeholders who share common industry-wide objectives, notably the development of the service industry. At the same time, the disconnect also acts as a major impediment to their proliferation.

A key factor hampering the appreciation of the potential value-added of service coalitions in developing countries relates to the differences in function versus developed country coalitions. Whereas the latter benefits from the primary focus on promoting market opening for its members, the former benefits in looking beyond liberalisation and towards filling key institutional deficits vis-à-vis policy and regulatory reforms as well as addressing practical issues such as trade and export promotion. Coalitions and their potential beneficiaries in developing countries also have different needs when it comes to building capacity on technical aspects of trade in services and understanding both the challenges and opportunities that may arise with prospective reforms, liberalisation and integration. This may in some cases lead to a distorted articulation of offensive and defensive interests (with the latter tending to take priority).

As illustrated in our review of initial and more recent experiences in the Caribbean coalition movement, and mirrored to some extent in the nascent experiences in SSA, a number of critical success factors can be highlighted. These include:

- Ensuring the private sector has a strong understanding of the national context as it relates to trade in services, as well as of the coalition movement regionally and internationally. This includes understanding how best to situate itself in the existing landscape of business support and membership organisations. Sharing knowledge and information regarding experiences beyond national/regional borders is key.

- All efforts must be needs driven. In other words, a coalition (or similar mechanism) cannot be all things to all people and should ensure that its mandate is properly targeted on those roles where clear value can be added. This may result in a focus on strictly advocacy or on the development of trade and export promotion interventions. It may even lead, in the right circumstances, to the conclusion that a service coalition is not needed at all. Determining such needs however can only be ascertained through local/regional research and broad-based consultations.
- Planning for implementation and long-term sustainability is vital. This includes formalising many of the structures and procedures for the coalition before attempting to launch and ranges from identifying a champion (at the political level) and a driver (at the technical level) to the institutionalization of logistics and operations and the development of measures for the day-to-day functioning of the coalition. Ensuring in particular the suitability of both the champion and the driver is critical, especially in small-scale circumstances, where personalities can play a significant determining factor. Strong technical competency for the driver is invaluable.
- A strong and functional relationship with the government is also crucial for success, including the inclusion of stakeholders with broad economic influence.
- A key theme observed in all the experiences reviewed is that the securing of adequate financial support is of utmost importance. Despite continued efforts by a core group of committed champions in the Caribbean, it appears to have been the securing of meaningful and stable financing that has unlocked the momentum and is helping to facilitate a CSI renaissance across the region. Such funds need not be exclusively donor financed and indeed there is a compelling case to be made that if governments value the supporting role a CSI can play, they should help support it (even if that support is more symbolic than facilitative). Moreover, burgeoning CSIs should be hyper-focussed on finding ways to generate income as soon as possible, with a view to becoming largely self-sufficient within a reasonable period of time (which the authors view as approximately five years). The importance of funding, in combination with the scarcity of government and private sector resources for such activities (especially in SSA) make coalition building a strong candidate to benefit from aid-for-trade funding.

Indeed a significant amount of the funds supporting the recent upswing in Caribbean coalition activities are sourced from such funds, such as the DFID-funded Caribbean Aid for Trade and Regional Integration Trust Fund (CARTFund) and similar funds via GIZ.

In pursuing the above levers of success, communications and outreach is key. A strong and well-executed communications strategy (which need not be prohibitively expensive) will help not only to raise awareness about the value of a coalition, but also lend needed credibility in demonstrating that those leading its development are adequately prepared.

On the issue of the national-regional interface, there is clearly a potential role for a regional body and/or network to support the national proliferation of coalitions. In this respect, regional efforts could precede national ones, however they are unlikely over the longer term to substitute for one another. The exception may be in instances where the level of regional policy and regulatory convergence and/or harmonization has reached a sufficiently advanced stage (one might envisage this being the case eventually for example in the EAC under the Common Market Protocol).

This Background Brief has attempted to contribute to the on-going discussion on service coalitions by shedding some light on experiences in the developing world, notably in the Caribbean as well as in East Africa. It offers some lessons therein, alongside specific guidance for those interested in forming coalitions nationally and/or regionally. Moving forward, there is a need for further research and analysis, including the incorporation of lessons from other regions in the world, notably in Asia and Latin America. By better supporting the private sector to understand and articulate their needs when it comes to policy and regulatory reforms, trade negotiations and export promotion activities, service coalitions can serve an essential role in promoting more developmentally-supportive trade-related outcomes, and in doing so, help unlock the potential of the services sector to foster growth, development and ultimately poverty alleviation.

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APPENDIX A – SERVICES AS % OF GDP IN AFRICAN AND CARICOM COUNTRIES

African Countries	GDP Per Sector – Services	African Countries	GDP Per Sector – Services
Algeria	30.3% (2007)	Niger	44% (2001)
Angola	24.6% (2007)	Nigeria	29.8% (2007)
Benin	52.3% (2007)	Republic of the Congo	37.3% (2006)
Botswana	46.9% (2006)	Rwanda	41.4% (2007)
Burkina Faso	50.9% (2007)	Sao Tome and Principe	71% (2007)
Burundi	45.4% (2007)	Senegal	64.6% (2007)
Cameroon	40.3% (2007)	Seychelles	69.6% (2007)
Cape Verde	74% (2007)	Sierra Leone	21% (2001)
Central African Republic	25% (2001)	Somalia	25% (2000)
Chad	30.6% (2007)	South Africa	65.5% (2007)
Cote d'Ivoire	50.5% (2007)	Sudan	35.2% (2007)
Democratic Republic of the Congo	37.3% (2000)	Swaziland	42.5% (2007)
Djibouti	59.6% (2006)	Tanzania	38.5% (2007)
Egypt	48% (2007)	Togo	35% (2003)
Equatorial Guinea	4.8% (2007)	Tunisia	62.8% (2007)
Eritrea	59.3% (2007)	Uganda	45.1% (2007)
Ethiopia	39.8% (2007)	Zambia	56.5% (2007)
Gabon	35.9% (2007)	Zimbabwe	59.3% (2007)
Gambia	58.5% (2007)		
Ghana	37.5% (2006)	CARICOM Countries	GDP Per Sector - Services
Guinea	37.6% (2007)	Antigua and Barbuda	74.3% (2002)
Guinea-Bissau	26% (1999)	Bahamas	90% (2001)
Kenya	59.5% (2007)	Barbados	78% (2000)
Lesotho	39.7% (2007)	Belize	62.6% (2007)
Liberia	17.7% (2002)	Dominica	49.5% (2004)
Libya	14.8% (2007)	Grenada	76.6% (2003)
Madagascar	57.4% (2007)	Guyana	47.1% (2007)
Malawi	44.1% (2007)	Haiti	52% (2004)
Mali	38% (2001)	Jamaica	62.2% (2007)
Mauritania	46% (2001)	Montserrat	75.7% (1999)
Mauritius	70.1% (2007)	Saint Lucia	80% (2005)
Morocco	47.8% (2007)	Saint Vincent and the Grenadines	64% (2001)
Mozambique	46.9% (2007)	Suriname	64.8% (2005)
Namibia	53.9% (2007)	Trinidad and Tobago	37.5% (2007)

Source: CIA World Fact Book - <https://www.cia.gov/library/publications/the-world-factbook>

ANNEX I – THE COALITION OF SERVICE INDUSTRIES MOVEMENT

The US Coalition of Service Industries (USCSI), the European Services Forum (ESF), the Hong Kong Coalition of Service Industries (HKCSI) and the Malaysia Professional Services Development Corporation (PSDC) in collaboration with (Malaysia) National Professional Services Export Council (NAPSEC) were chosen as examples in this paper as leading international service organizations (emanating from economies with very strong services sectors).

US Coalition of Service Industries¹⁹

The Washington, D.C. based USCSI was established in 1982 and is the oldest and most influential of the national coalitions. The USCSI serves primarily as a lobbying organization that seeks to raise the profile of the services sector nationally and internationally. The CSI champions both the Global Services Coalition and the Global Services Network.

Objectives:

The goals of the USCSI, as noted by the organization, are “expanding the multilateral trading environment to include more countries and more services, enhancing bilateral services trading relationships and ensuring competitive services trade in the global marketplace”. Other objectives of the organization include reducing barriers to services trade, ensuring that U.S. economic policies reflect the importance of the services sector and providing data and analysis on the impact of services on the U.S. economy.

Ultimately speaking, the main objective of the CSI is to expand the national and international market share of its membership. This is done by consistent and persistent lobbying and advocacy efforts vis-à-vis the U.S. and other international governments, and through its role in the Global Services Coalition as well as via the organization’s various committees and working groups, to encourage further liberalization of the services sectors and the application of policies conducive to services trade.

Membership:

The membership of the USCSI includes high profile international companies from a wide cross section of service sectors including banking, insurance, telecommunications, information technology, travel and tourism, transportation and diversified management sectors. USCSI members trade within all fifty states and are exporting to over one hundred countries worldwide. Membership includes, for example: AT&T, CitiGroup, Comptia, FedEx, GE Oil and Gas, IBM, Microsoft, Time Warner, VISA International and WalMart, amongst many others.

USCSI’s affiliate membership category includes key professional bodies such as the American Bar Association, the American Consulting Engineers Council, the American Institute of Architects and the Motion Picture Association of America.

Full membership in the USCSI is USD\$20,000 per annum, which includes participation in all working groups (see below). Additional membership advantages are offered through participation in the ‘Chairman’s Circle’, including membership on the Board of Directors and invitations to special events including the Global Services Coalition missions and events. The membership fee for the Chairman’s Circle is USD\$25,000 per annum.

Structure:

The work of the USCSI to increase the international competitiveness of its membership is advanced via the efforts of various working groups and committees. The committees were established based on issues that were of particular importance to company members and are all chaired by members. These committees are presently: The China Working Group, the India Working Group, the Financial Services Committee, the Steering Committee, the Strategy Committee, the Insurance Committee and the Telecoms, IT and Media Working Group.

The USCSI has also established the Research and Education Foundation, a non-profit organization that conducts research and undertakes educational projects that complements the activities of the USCSI and advances the interests of the U.S. services sector in general. The Foundation seeks to raise awareness on the importance of the services sector and the benefits to trade in services.

The USCSI’S secretariat includes a President, Vice President, Programme Manager and a Programme Associate. The day-to-day operations of the organization are undertaken by the Vice President and Programme staff. The funding for the secretariat is secured largely through membership fees, though funding is also obtained through the hosting of events, such as the annual Global Services Summit.

The USCSI’s success in raising awareness of the importance of the services sector and trade in services can be largely attributed to the organization’s powerful membership and strong linkages with leading players in the U.S. government and within key international organizations. Also the persistence and consistency of the organization in formally responding to any initiative or policy that would impact the services sector is crucial to the

organization's influence. This approach helps to ensure that the relevant decision-makers receive strong and determined messages regarding the preferred way forward for USCSI members as it relates to the services sector. Governments are thus more likely to respond positively to such powerful, focused, and consistent lobbying efforts.²⁰

On the basis of this experience and success, it would seem advisable for nascent coalitions to encourage leading services companies to join the coalition and to offer these companies leading positions on various committees. It would also be strategic for such coalitions to learn from the USCSI's communications model and not only respond to services-related initiatives of their governments, but to proactively and consistently send various government and other trade-related agencies strong messages regarding the potential impact of key issues under consideration on the services sector.

European Services Forum²¹

The European Services Forum (ESF) was established in 1999 in response to the WTO multilateral negotiations on services, GATS 2000. The scope of the organization has been subsequently expanded to include all international trade negotiations. Like the USCSI, the ESF represents the interests of large European companies in "actively promoting the liberalisation of international trade in services".

Objectives:

Through its relationships with the European Commission, the Global Services Coalition and international trade organizations, the ESF provides private sector input into multilateral, regional or bilateral negotiation forums based on a set of eleven principles that are intended to encourage maximum trade liberalization in services. These include ideals such as: a comparable emphasis on services as much as on goods in all international trading arrangements, a push for ambitious services liberalization across all four modes and a focus on the multilateral approach to services liberalization.

This advocacy is accomplished directly via European negotiators and through position papers, speeches, press releases and participation in international services conferences.

Membership:

The members of the ESF are the leading European services companies and professional associations. There are thirty members in both the company and association membership categories. Some of the company members include: British Telecommunications, Siemens, Lloyd's of London, Oracle and

Vodafone. Association members include regional associations such as the Architects' Council of Europe, the European Banking Federation, the European Broadcasting Union, and the European Federation of Engineering Consultancy Association. Notably, as the only active regional coalitions, Association members also include national umbrella bodies, such as the German Federation of Liberal Professionals, the Confederation of Danish Industries, the Confederation of Finnish Industries, the Irish Business and Employers Confederation and the Confederation of Swedish Enterprise.

Structure:

There are three related bodies responsible for the work of the ESF: the European Services Leaders Group, the ESF Policy Committee and the ESF Secretariat.

European Services Leaders Group: The European Services Leaders Group is comprised of the Chairpersons/CEOs of ESF's company members. The role of this group is essentially to raise the profile of the services sector and to ensure, through meetings with high level principals responsible for EU and international trade policy, that services secure a leading consideration in trade dialogues.

ESF Policy Committee: One representative of every ESF member serves on the ESF Policy Committee. The committee ensures that the voice of the ESF membership is well reflected in the work of the organization. The Committee develops policy and position papers and determines the direction of the organization. The committee also has opportunities to meet directly with negotiators and policy makers as key representatives of the EU services sector.

ESF Secretariat: The ESF secretariat, a very small staff generally of one or two persons, acts on behalf of the ESF members and performs the day-to-day functions of the organization. The secretariat maintains ongoing dialogue with relevant services players, including Chambers of Commerce, Civil Society, EU officials and services associations, informs its members of relevant trade matters and organizes Committee meetings. The budget of the ESF, raised mainly from contributions of the European Services Leaders Group and membership fees, serves to cover the costs of the secretariat.

Being the only regional services coalition, as touched on above, it should be noted that only eight European countries are reflected in the national membership and in particular those from countries with more developed services sectors (e.g. Denmark, Finland, France, Germany, and the United Kingdom, Switzerland and Norway). While the ESF has discussed reaching out to those with less developed service sectors, it recognizes that doing so

²⁰ A listing of USCSI's lobbying efforts can be found at <http://www.uscsi.org/press>

²¹ The information in this section draws from the ESF website www.esf.be

would require additions to the functionality of the organization in terms of development initiatives, which in turn would require additional staffing and funding for related programmes. Indeed, it would require the shift towards more of a developing country CSI model described in the previous section, though with the added complexity of being regional in representation.

Hong Kong Coalition of Service Industries²²

The Hong Kong Coalition of Service Industries (HKCSI) was established in 1990 by the Hong Kong General Chamber of Commerce, the oldest and largest business organization in Hong Kong, and serves as the ‘services policy think tank’ for the Chamber.

Objectives:

The mission statement of the HKCSI is, “to promote the continuing development and competitiveness of the Hong Kong service industries”. To this end, the HKCSI outlines seven objectives, including promoting the development of a “service friendly environment”, providing a focal point for liaison with Government and establishing and maintaining cooperation between members of Hong Kong’s service industries for the purpose of achieving common goals.

As with the previous two coalition examples, the HKCSI is primarily a lobbying and advocacy organization. However, a noteworthy difference between USCSI and ESF with the HKCSI, is that while all Chamber members are automatically members of the coalition, the core membership of the HKCSI is namely service associations. Another key difference is that the HKCSI is situated within the Chamber and not as a stand-alone organization such as the USCSI or the ESF. In this respect, it offers an alternative model for other CSIs, which could be embedded within an existing business support/membership organisation.

The emphasis of HKCSI is therefore on raising awareness of the importance of the services sector and in responding to services-related trade or related policy issues. This is done via a range of activities and events that promote the services sector both locally and internationally, through the publication of a quarterly newsletter and via research projects and studies. It should be noted however that since 2006 the efforts of the HKCSI seem to have been largely tied to the efforts of the Global Services Coalition.²³

The HKCSI sits on various government committees such as the Small and Medium Enterprises Committee, the Services Promotion Strategy Group and the Information Infrastructure Advisory Committee and represents the services sector in the

various negotiation platforms.

Members:

Founding members of the HKCSI include the Hong Kong Shippers’ Council, the Hong Kong Society of Accountants, the Hong Kong Bar Association and the Hong Kong Tourism Board.

Structure:

Apart from the Executive Committee, there are two other committees – the Financial Services Committee and the Travel/ Tourism Committee.

The committees are chaired by a member whose expertise in the field prevails. They meet regularly to discuss relevant issues and present their findings to the Government.

Malaysia Professional Services Development Corporation²⁴ ***/National Professional Services Export Council***²⁵

In response to a 2000 memorandum presented by twenty-two professional services bodies entitled, *Challenges Faced By the Services Industry As a Result of Globalization and Liberalization Pressures With Emphasis on Professional Services* to the Malaysia National Economic Action Council (NEAC), two national services bodies were established.

Both established in 2001, the role of the Malaysia Professional Services Development Corporation (PSDC) is to ‘accelerate the capacity of Malaysian professional service providers’, while the role of the National Professional Services Export Council (NAPSEC) is to advise on ‘matters pertaining to the export of professional services’.

Both PSDC and NAPSEC are public sector bodies.

PSDC

Objectives:

The PSDC is owned by the Ministry of Finance, under the Ministry of Works. Unlike the USCSI, the ESF or the HKCSI, the PSDC is not a cross sectoral body, but rather focuses largely on professional services related to the construction sector (e.g. engineers, architects, surveyors, planners, etc.).

The PSDC is a capacity building organization. It offers a series of training programmes through the organization such as ISO certification, Project Management Professionals (PMP) programmes and certification and financial training. Trade-related training is also offered on relevant trade and mutual recognition agreements. The PSDC is very active in this respect and training is offered on an ongoing basis. Sixteen training activities were offered in the month of July 2010, for example.

²² The information in this section draws from the HKCSI website – www.hkcsi.org.hk

²³ For example, since 2006 the policy submissions featured on their website are GSC submissions and the missions undertaken list only GSC missions to Geneva.

²⁴ www.mypsdc.com

²⁵ www.matrade.gov.my/cms/content.jsp?id=com.tms.cms.section.Section_hide_NAPSEC_en

The PSDC also provides construction related procurement notices, facilitates the acquisition of funds and grants, undertakes trade missions and participates in trade shows. PSDC also provides export information, including market intelligence.

Membership:

Of the four hundred and sixty three firms that are members of the PSDC, three hundred and sixty four are construction related, while the remaining ninety-nine are comprised mainly of legal and accounting services.

Structure:

A Board of Directors is appointed by the Ministry of Works that governs the PSDC, while the organization is guided by a large consultative panel that comprises of many key agencies in the public and private sectors. The panel comprises representatives from thirty-three bodies including the Ministry of Works, the Ministry of International Trade and Industry, Malaysia External Trade Development Corporation, the Board of Architects, the Board of Engineers, the Institution of Surveyors and the Malaysian Society of Interior Designers.

The staff of PSDC, approximately twenty-five employees, is the largest of all services bodies. There are two main arms of the organization, 'Development' (Information Hub, Export Promotion and Facilitation, Training) and 'Operations' (Events & Marketing, HR & Admin, Information Technology, Corporate, Finance & Accounts).

NAPSEC

NAPSEC covers a wider-cross section of the service industry. Its membership comprises of public and private sector representatives that meet on a quarterly basis to discuss export development strategies for Malaysia's professional services sector.

Objectives:

The objectives of the organization include the formulation and review of national strategies and promotional programmes for the export of professional services, including incentives and funding initiatives; the development of a database on market access issues and regulations affecting the export of professional services and the dissemination of information related to market opportunities.

Members:

NAPSEC members comprises of twenty four bodies including the Association of Private Hospitals (Malaysia), Bar Council Malaysia, the Central Bank of Malaysia, Ministry of International Trade and Industry, Ministry of Health, Malaysia Professional Centre and the

Professional Services Development Corporation.

In this context, Malaysia (both PSDC and NAPSEC) offer another variation of organisational model, being driven more directly by the public sector as an explicit mechanism for engaging them in the institutional decision- and policy-making processes and more generally as services-specific export promotion agencies.

Global Services Network²⁶

The Global Services Network (GSN) was established in 1998 at an international, private sector forum discussing the "Services 2000" negotiations at the WTO. It is an informal, private sector network described as a "community of business people, government officials, academics, and others who are committed to increased trade and investment in services, and a rules-based, multilateral trading system." The objectives of the network are outlined below:

- A forum to identify and remove barriers to trade and facilitate business in the service industry;
- An online community to develop strategies for individual services sectors in the WTO and other forums;
- A means to monitor implementation of services trade agreements;
- A way to strengthen services organizations around the world;
- A resource to advance knowledge of the services sector through readily accessible information.

While the network is described as "an interactive, on-line community", the role of members in the GSN is largely passive. A newsletter prepared by the USCSI is received on a regular basis by members of the network.

Membership is free and is open to whoever wishes to be a part of the network.

Of particular interest, one of the objectives of the network is noted as "a way to strengthen services organizations around the world". Towards this aim, the GSN provide some access/visibility to general information on services, but little beyond this. One possible action going forward would be for the GSN to become more proactive on this objective and helping to support burgeoning CSIs.

Global Services Coalition

The Global Services Coalition (GSC) is an informal, umbrella body of services coalitions and other similar services organizations. It performs a lobbying and advocacy role, typically via collaborative letters, in an effort to ensure that services remain at the forefront of the global trade agenda.

²⁶ www.globalservicesnetwork.com

Many of the coalitions, and the GSC grouping itself, are closely related to other intergovernmental agencies with mandates covering services issues, such as the World Trade Organization (WTO), the International Trade Centre (ITC) and the United Nations Conference on Trade and Development (UNCTAD).

Example of more recent activities of the GSC are the last two joint letters sent to the Leaders of the G20 in October 2009 and May 2010 respectively. These letters addressed areas of concern such as protectionism via barriers to trade and other restrictions, as well as the stagnation of the Doha Round (generally and on services in particular). The letter thus called for a resumption and successful conclusion of the Round, including ambitious undertakings in services.

The GSC also conducts joint missions to the WTO in Geneva to meet with the organization and various Ambassadors. Again the aim here is to put forth similar messages regarding the completion of the Doha Round with meaningful new commitments in services (both market access and on rules).

The GSC is administered by the USCSI, with support from the ESF. The USCSI, for example, generally leads the lobbying efforts by preparing the first draft of position papers/letters, which are circulated to GSC members. They will then edit and contribute further to the documents, which are eventually submitted and/or disseminated by the USCSI on behalf of the grouping. Any coalition or service grouping may sign onto (or be excluded from) a joint advocacy letter and therefore become an active member of the organization. Members of the GSC include the Australian Services Roundtable, Business New Zealand, Caribbean Network of Service Coalitions, Canadian Services Coalition, Coalition of Service Industries Malaysia, European Services Forum, Hong Kong Coalition of Services Industries, Japan Services Network, Mexican Services Coalition, National Association of Software and Services Companies (NASSCOM, India), Taiwan Coalition of Services Industries, TheCityUK, and the USCSI.

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