REGIONAL AND DOMESTIC INDUSTRIALISATION POLICIES IN AFRICA: CASE STUDY OF TWO SADC STATES

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The growing dependence of economic growth on industrialisation has prompted the need for the development of industrialisation policies both at regional and national levels. The Southern African Development Community (SADC) bloc developed an industrial development framework for its member states with the aim of promoting industrial development. Botswana and Tanzania as member states of SADC have undertaken commitment under the framework and consequently recognised the need to align their own national industrial policy in order to achieve the desired outcomes. The study seeks to analyse the synergies created by adoption of both SADC policy framework and the domestic national policy. This is done through the general analysis of the overall policy environment for industrial development in both countries by highlighting reasons for success and failures as well as policy gaps to be addressed by governments. Suggestions for improvement on review and policy strategy are given based on identified success and failures. The recommendations will guide strategic policy formulation in dealing with prevailing national needs.

Keywords: domestic policies, industrialisation, regional policies

Introduction

Policies formulated by regional blocs provide a framework for development within bloc boundaries. As a bloc trading area, Southern African Development Community (SADC) initiated a policy towards industrialised Africa for the purpose of providing development opportunities to member states in April 2015 (Zarenda 2012; McCarthy 2014; SADC 2017). SADC industrialisation development is guided by the SADC industrialisation strategy and roadmap 2015-2063 which include plans for the manufacturing sector (SADC 2017). The SADC policy is geared towards shifting the member states to more industrialised economies. Industrial policies for regional blocs create opportunities and challenges particularly for the manufacturing sector. For example, SADC needs to increase manufacturing sector share of Gross Domestic Product (GDP) to above 25% to significantly transform the economic and social status of majority of citizens (Southern African Research and Documentation Centre 2015). Existing records from 2010 to 2017 as per World Bank Database (2017) indicate differences in growth of the manufacturing sector whereby Tanzania is performing relatively better than Botswana. Therefore, this study is interested in the comparative analysis of industrial

policies and manufacturing sector to establish the sources of comparative advantage between the two SADC member states towards industrialisation.

Prevalent literature on the manufacturing sector in Sub-Saharan Africa relates mostly to Small and Medium Enterprises (SMEs), banking, financial capital, shopping of industrial products, regional trade, ownership, strategic networks and milk societies (Chalu, King'ori and Shayo-Temu 2018; Muchingani, Monametsi and Paradza 2017; Mkwizu and Dominic 2018; Mkwizu and Matama 2018; Mkwizu, Wilbard, Mbilinyi and Maliva 2018; Swai, Ndanshau and Lwiza 2016; Swai, Monametsi and Mkwizu 2018; Wilbard, Mbilinyi, Maliva and Mkwizu 2018a 2018b). Therefore, updated analysis is needed on regional and domestic industrialisation policies with the focus on two SADC member states being Botswana and Tanzania. The motive for this study is the analysis of industrial development geared across countries under a similar regional bloc with varying potentials towards industrialisation agenda. This conceptual paper specifically examines industrial policy and manufacturing sector output by comparing Botswana and Tanzania guided by the comparative advantage theory.

Literature Review

Theoretical Framework

Smith's theory of absolute advantage developed in 1776 assumed general basis of international trade while Ricardo's theory of comparative advantage developed in 1817 is more powerful in indicating trade benefits even in the absence of absolute advantage (Watson, 2017). Comparative advantage theory asserts that countries have relative differences in productivity leading to international trade whereby the larger differences in comparative advantage then the larger the gains from trade (Svenson 2015). In the framework of comparative advantage, SADC as a regional bloc provide trade opportunities to its member states and hence, it is imperative to examine the comparative advantage in industrial policy and manufacturing sector output between Botswana and Tanzania as selected member states of SADC in this study.

Industrial Policy and Manufacturing Sector for SADC

The SADC Industrialisation Strategy and Roadmap 2015 – 2063 was adopted by member states in 2015 due to slow progress in the industrial sector particularly manufacturing (SADC 2017). The manufacturing sector contribution to GDP for SADC recorded 10.6% in 2015 compared to 14.1% in 2005 which indicates a declining trend of the manufacturing share to GDP (SADC 2015). As part of the industrial development framework, SADC has identified key areas that are necessary for the successful implementation of its framework (SADC 2017). The framework is a component of policies that either directly or indirectly affects industrial structure. SADC recognises that effective implementation of their framework hinges upon regional commitment and enhancement of tangential policies (SADC 2017). These key areas have been problematic in the SADC member states and the reason for low manufacturing outputs.

Industrial Policy and Manufacturing Sector for Botswana and Tanzania

Botswana's first Industrial Development Policy (IDP I) was developed in 1984-1998 with the aim of promoting economic diversification, employment creation and private sector development through import substitution of locally produced goods. IDP II of 1998-2012 changed its emphasis to export led growth which reflected a desire for more sustainable and long term development of the economy (Botswana Government 2014; Ratsebe and Molefhe 2018: 25-26). In order to achieve these objectives, a number of institutions were initiated to support the expected higher output of local manufactured outputs such as the Local Enterprise Authority (LEA), the Citizen Entrepreneurial Development Agency (CEDA) and the Botswana Export Development and Investment Authority (BEDIA) (Botswana Government 2014). The latest IDP III 2014-2028 still focuses on export led growth through strategic use of already established resources (Botswana Government 2014). For example, where IDP II emphasised on

human resources development, IDP III focuses on strengthening development of industry aligned skills. However, IDP III, unlike its predecessors hopes to look at other sectors with potential of driving industrial growth while still having manufacturing as the core sector. This intended to support the transitional stage of a factor driven economy to an efficiency driven economy that Botswana is currently.

The Tanzania government initiated a 25-year Sustainable Industrial Development Policy (SIDP) in 1996 with the aim of enhancing sustainable development of the industrial sector from 1996 to 2020 (SIDP 1996). SIDP accords priority to employment creation, economic transformation, equity development and a balance between import substitution and export orientation. Under SIDP, the private sector is recognised as the main vehicle for making direct investments in the sector while the government is tasked to provide an enabling environment for investment. Other initiatives include Tanzania Development Vision 2025, formulated in 1999 with an emphasis on the role of the industrial sector for development so as to ultimately make the nation semi-industrialised by 2025 (Tanzania Online 2008). It follows that Vision 2025 recognises the leading role of the industrial sector in transforming Tanzania's economy. To augment the efforts to attain SIDP goals, the Export Processing Zones (EPZs) Act was passed in April 2002 and its implementation started effectively in March 2003 (Tanzania Online 2008). In 2011 the SIDP was reformulated to Integrated Industrial Development Strategy (IIDS) 2025 to match with the needs of the country's vision 2025 (Policy Forum 2018). The focus of the IIDS was to respond to Kilimo Kwanza initiative to recognise the contribution of the agriculture sector in industrial development in Tanzania. IIDS aims to ensure that the manufacturing sector contributes 23% to GDP and grows at 15% by 2025. This was further emphasised in the Five Year Development Plan (FYDP) II 2016/17-2020/21 which fosters economic and industrialisation development (Policy Forum 2018).

The industrialisation policies for Botswana and Tanzania are in line with the SADC regional policy 2012-2063 for industrialisation. The industrial development goes hand in hand with the resources supporting its development including access to finance, investment, infrastructure development, macroeconomic stability, labour market and trade competitiveness. Such policies for both Botswana and Tanzania are indicated in Table 1 and Table 2.

Table 1: SADC Thematic Policies and Domestic Policies for Botswana and Tanzania

SADC Thematic Policies	Botswana Domestic Policies	Tanzania Domestic Policies
Finance and Investment	Investment Strategy 2010 Private Sector Development Strategy	National investment Promotion Policy 1996
Infrastructure, services, Macro-economic Frameworks	National Development Plan 10 Vision 2036	FYDP 1 2011/12-2015/16 FYDP ll 2016/17-2020/21
Politics and Governance	National Trade Policy 2009	Tanzania Mini-Tiger Plan 2020; Long Term Perspective Plan 2011/12-2025/26; Tanzania Development Vision 2025

Source: Compiled from Policy Forum (2018); Botswana Government (2014); Tanzania Online (2008)

Table 2: SADC Thematic Policy Areas and Related Domestic policies for Botswana and Tanzania

SADC Thematic Policy Areas	Botswana Related Domestic Policies	Tanzania Related Domestic Policies
Trade and competition policies	National Trade Policy 2009; National Export Strategy 2010; Economic Diversification Drive Strategy 2011; Special Economic Zone Policy 2010; Competition Policy 2008	National Trade Policy 2003; SMEs Development Policy 2003
Social and human development policy	Co-operatives Transformation Strategy 2012; Citizen Economic Empowerment Policy 2012; Entrepreneurship Development Policy 2014	National Strategy for Growth and Poverty Reduction (MKUKUTA) I and II ; Tanzania Development Vision 2025
Industrial Development Policies	IDP I 1984-1998; IDP II 1998-2012 IDP III 2014-2028	SIDP 1996; IIDS 2025
Technology and Innovation Policies	Botswana National Research, Science and Technology Plan 2005; National Science Technology and Innovation Policy of 2012	National Science and Technology Policy 1996

Source: Compiled from Policy Forum (2018); Botswana Government (2014); Tanzania Online (2008)

Effectiveness of Domestic Policies for Botswana and Tanzania

This section establishes the impact of policies implemented in Botswana and Tanzania in Table 3 using global competitive index rankings by the World Economic Forum (2014 2015 2016 2017 2018) and global index on indicators of infrastructure, macro-economic development, technological readiness and market size ranks. Table 3 shows that Botswana scored higher in global index rank, infrastructure, macro-economic development and technological readiness ranks. On the other hand, Tanzania scored higher than Botswana in terms of market size. This suggests that Botswana's policies have been more effective than that of Tanzania. However, Tanzania has the advantage of a larger market size in comparison.

Table 3: Global Competitive Index for Botswana and Tanzania

	Tanzania				**Botswana**			
Indicator	2014-2015	2015-2016	2016-2017	2017-2018	2014-2015	2015-2016	2016-2017	2017-2018
Rank	121	120	116	113	74	71	64	63
Global index (1-7) the best	3.6	3.6	3.7	3.7	4.2	4.2	4.3	4.3
Infrastructure	2.3	2.4	2.7	2.8	3.2	3.3	3.5	3.6
Macro Economic Development	4.1	4.5	4.6	4.6	6.3	6.5	6.2	6.1
Technological Readiness	2.5	2.5	2.6	2.6	3.6	3.3	3.6	3.6
Market Size	3.6	3.8	3.7	3.8	3.1	3.0	2.9	3.0

Source: World Economic Forum (2014 2015 2016 2017 2018)

Figure 1 below shows the percentage of manufacturing sector contribution to GDP and the manufacturing sector GDP annual growth rate for both countries from 2010 to 2017. There is a downward trend for Botswana whereas Tanzania reflects slight fluctuations of between 8% and 5%. Botswana has the lowest percentage contribution of all SADC countries despite the seemingly conducive policy environment as indicated by ranking from Table 3 and this is because the economy is still highly dependent on diamond mining even though manufacturing is the main focus area for IDP (Botswana Government 2014). Tanzania's manufacturing sector is still growing and the manufacturing establishments increased from 2005 to 2010 as a result of growth in the number of small enterprises which employ 5-49 workers (Kweka and Ugarte 2013; Page 2016). Of keen interest, is that Tanzania's manufacturing sector growth is attributable to the subsectors of food processing, textiles, basic metals, machinery and equipment (Page 2016). Other reasons for manufacturing sector growth in Tanzania is related to continued improvements in infrastructure investment, stability of power supply, investments in provision of mobile and internet services, subdued global oil prices and manufacturing activities (Bank of Tanzania 2018; Lubawa and Van Auken 2018).

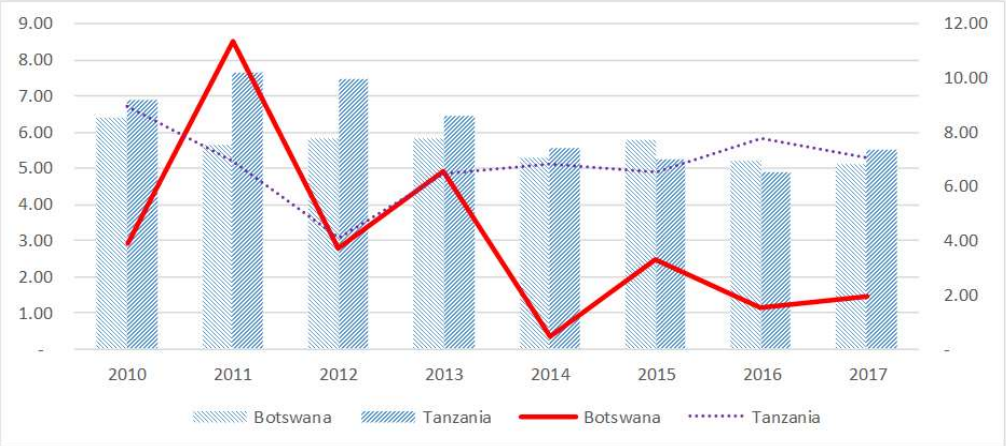


Figure 1: Contribution to Manufacturing Sector to GDP

Source: World Bank Database (2017)

Note. Bar Charts and Growth of the Manufacturing Sector (Line Graphs) for Botswana and Tanzania 2010 to 2017

Methodology

Documentary research methodology was adopted for purposes of examining industrial policy and manufacturing sector output for SADC by comparing Botswana and Tanzania. A similar study by Komba (2016) also adopted documentary research methodology to conduct research. The reason for selecting these two countries is the fact that their economies are shifting towards industrialisation. Another reason for the selection of Botswana and Tanzania in this study is because of their differences in manufacturing outputs which motivates this study to examine the related industrial policies and underlying reasons for output disparity hence establishing sources of comparative advantage for each country. The documentary research method involves a careful analysis of relevant policy documents, conference papers, reports and journals. The reviewed literature assists the comparative analysis on industrial policies adopted at regional and domestic levels for each country versus the manufacturing output.

Discussion

From the reviewed literature, it is evident that the sources of comparative advantage of industrial policy and the manufacturing sector can be summarised as administration challenges, energy supply, government role, inclusion of the informal sector and focus on innovation. These sources of comparative advantage between Botswana and Tanzania are discussed further in the next sub-sections.

Administration Challenges

Botswana's implementations of policies is largely uncoordinated hence ineffective (Venables 2010). This has lead in some instances to duplicated efforts and undermining of objectives due to sometimes competing objectives (Sekwati 2010). On the other hand, in Tanzania, Mwang'onda, Mwaseba and Juma (2018), recommended for the country to centrally coordinate all development policies to ensure connectivity and progressive monitoring of policies' implementation.

Energy Supply

Energy supply is a domestic and regional problem that exists in SADC member states. Essah and Ofetotse (2014) noted the Morupule B power plant project in Botswana faced many problems including missing of the project deadlines. Currently, Tanzania has prioritised the discovery of Gas in the Southern parts of Tanzania, development of natural gas pipelines and Stiegler's Gorge electricity project is expected to add 2.1GW of power (Aly, Moner-Girona, Szabo, Pedersen and Jensen 2019).

Government Role

As can be deduced from Table 1, the government of Botswana has shown its commitment to industrialising the economy and seeks to correct market inefficiencies through strategic partnerships with the private sector that identify products/services with actual or potential domestic and/or international demand. However, the private sector of Botswana is not as strong as the government. Some argue that the government does the job so well that it even does the job of the private sector (Sheriff and Muffatto 2015). In fact, most of the vertical linkages of CEDA companies involve the public sector (Themba and Josiah 2015). The African Economic Outlook (2018) noted that PPPs in Botswana are not yet significant in the country. In Tanzania, the government's role through political priority provides opportunities for example, by expanding electrification in the country (Aly et al 2019).

Overall governance index for Botswana and Tanzania according to Ibrahim Index of African Governance (IIAG) showed that Botswana was ranked 5/54 countries while Tanzania is 14 out of 54 (IIAG 2018). Overall, Botswana seems to have made some strides as indicated by relatively high ranking in overall governance index. Although Tanzania is ranked 14th, the ranking indicates (+ 1.3) compared to Botswana (-3.7) and this is a positive sign for the overall governance of Tanzania. Furthermore, IIAG (2018) shows that Tanzania's overall governance is considered as bright green flag 2008-2017 with trends categorised to be "Increasing Improvement". Hence from a flagship perspective of ranking, Tanzania's overall governance is performing better than Botswana. The ranking and flagship systems approach by IIAG assists to shed light on governance effect on national industrial policies which compliment SADC policy areas in terms of governance.

Inclusion of the Informal Sector

Botswana's and Tanzania's informal sector had an average of 30.30% and 52.20% of GDP between 1991 and 2015 respectively (Medina and Schneider 2018). Hence exclusion of the informal sector may not be appropriate since the informal sector represents a significant portion of GDP. Hassan and Schnieder (2016) highlighted that the drivers of increased informal sector such as weak law enforcement mechanism, high bureaucracy, deteriorating infrastructure, and high taxes have been identified as hindrances to industrial development. Therefore, Tanzania

and Botswana should concentrate on ensuring that policies also address the informal sector that exists due to the potential for increasing manufacturing output.

Focus on Innovation

The overall innovation ecosystem in Africa is inadequate and undeveloped. According to the World Intellectual Property (WIPO 2017), Africa filed the least number of patent applications compared to other regions (0.5%). Nandonde et al (2015) noted that there is less attention to organisational innovation for the manufacturing sector particularly for sunflower oil processors in Tanzania. Mwang'onda et al (2018) argued that emphasis should be on agro-allied resource-based industries that will ensure massive job opportunities. Therefore, in order to improve further in manufacturing, Tanzania can focus on innovation and agro-allied resourced-based industries to sustain growth in the manufacturing sector.

Conclusions

There are differences in the manufacturing sector contribution to GDP and manufacturing sector growth between Botswana and Tanzania. Tanzania is performing better than Botswana and therefore, enjoys a comparative advantage over Botswana in terms of increasing manufacturing sector output and higher contribution of the manufacturing sector to GDP. The sources for the comparative advantage of better performance by Tanzania is reflected on the success of firms from food processing, textiles, basic metals, machinery and equipment as suggested by Page (2016) as well as engaging the private sector towards industrialisation. Botswana can learn from Tanzania particularly the aspect of private sector participation in the industrialisation process. In order to further increase the performance in the manufacturing sector, Tanzania can also learn from Botswana on the aspects of infrastructure, macro-economic development and technological readiness.

In addition, this study reveals that there are alignments between the SADC industrial regional policy and domestic policies for both Botswana and Tanzania. In particular, the SADC thematic policies were adopted at regional level and supported with the formulation of related domestic policies for the purpose of moving towards industrialised economies. However, this study reveals that a number of challenges exist in the implementation of policies in relation to the growth of the manufacturing sector for the SADC member states towards industrialisation and these include administration challenges, innovation and exclusion of the informal sector. The outcome of the reviewed literature in this study has implications in efforts towards industrialisation, and that in order for Botswana and Tanzania to realise full potential in the manufacturing sector, review of policies from time to time should be done to address shortfalls like administration challenges in implementing policies, provide training to build capacity of qualified local personnel in the energy sector responsible for supply of power to the manufacturing sector, prioritise innovation, improve PPPs as well as inclusion of the informal sector.

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