

Promoting Sustainable Industrial Parks via South-South and Triangular Industrial Cooperation Platform

Project Inception Report

Vienna, Austria
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UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

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Executive Summary

This inception report is prepared as part of the preparatory phase of the project entitled “Promoting sustainable industrial parks via South-South and triangular industrial cooperation platform”. The overall objective of this project is to improve developing countries’ capacity for sustainable industrial park development and strengthen the implementation of the third industrial development decade for Africa (IDDA3) within the framework of South-South cooperation. The project also facilitates industrial parks knowledge management, skills development and provides networking tools for the implementation of inclusive and sustainable industrial development (ISID) thereby to contribute to poverty reduction efforts. It is also foreseen to strengthen UNIDO’s role as a capacity-builder and knowledge and expertise-broker to achieve ISID through South-South and triangular industrial cooperation (SSTIC) modality.

The project is funded by the Government of the People’s Republic of China with USD 1.5 million contribution and will be implemented for the duration of 36 months, from July 2020 to June 2023. The project is located with the Programme for Country Partnership Division (PFC/PPC/CPD) and will be implemented in collaboration with partners from development finance institutions, government entities, research and academic institutions, as well as private sector actors.

The intervention framework of the project is developed based on the project specific objectives and outputs as approved by the Executive Board: EB decision, 6-7 May 2020. The inception report addresses all EB comments,

including specifying the monitoring, reporting and evaluation budget aligned with indicators and means of verification. Other areas of the project remain unchanged as approved by EB.

The inception report is prepared based on the inputs from UNIDO Field Offices and programme or project related documents such as the Programme for Country Partnership(PCP) and Country Programme(CP)/CP programme documents, monitoring reports, evaluation reports, conference reports, country diagnostic studies and back-to-office mission report(s). The project team conducted a survey with UNIDO Field Offices covering 43 countries: 17 from Africa, 4 from Arab Region, 9 from Asia and the Pacific, 4 from Europe and Central Asia and 9 from Latin American and the Caribbean. Participants of the survey comprise 24 UNIDO Country Representatives (UCRs), 15 UNIDO Representatives (URs), 1 PCP Manager, 1 CP Manager, 1 Country Programme Coordinator, 1 Programme Officer, 1 National Programme Officer and 1 Project Manager.

The findings of the inception study show that while industrial parks play an important role in the industrial policies of many countries, many developing countries have limited institutional and human resource capacity to plan and execute the initiative. Some of the key findings or baseline situations of the study include the following:



Industrial parks gained popularity as industrial policy instruments in recent years. Today, about 147 countries, three quarters from developing economies and almost all transition economies, have industrial parks.



Industrial parks are perceived as key to national progress on the Sustainable Development Goals (SDGs), in particular ISID in developing countries. For example, the 2019 Africa SDG Index and Dashboards Report identified Integrated Agro-industrial Parks (IAIPs) in Ethiopia as one of the best practices on SDG implementation efforts in Africa.



Industrial parks are core component of 9 PCP countries (in different stages of development and implementations) which took part in our survey. In addition, about 55 percent (12 CP countries) of those who participated in the survey have industrial parks as a component of the CP.



UNIDO has extensive expertise and tools in the development of industrial parks accumulated over the past four decades. However, this expertise and tools are spread across various departments of the Organization. In order to continue to provide integrated technical assistance in the field of industrial parks, there is a need to consolidate in-house experiences and create innovative mechanisms for generating and managing knowledge on industrial parks. In this regard, more than 80 percent of survey participants stressed the importance of establishing a dedicated industrial parks knowledge hub and center of excellence.



There are many institutions, including universities, governments, research institutions, development agencies and multilateral donors that undertake studies on industrial parks. Establishing an innovative networking tool will facilitate the exchange of information and best practices.



While industrial parks have a strong track record in helping foster economic development, by providing an institutional framework, modern services, and physical infrastructures, many developing countries have capacity limitation to successfully implement industrial parks project due to complexity of the process.



Knowledge sharing and peer learning mechanisms can enable industrial development practitioners to disseminate solutions and best practices from one country/institution to another.



Increasing awareness and promoting Southern narratives, solutions and alternatives for positive and Southern-led industrial development are crucial for industrial parks development in developing countries and economies in transition.



There is a need to regularly review and update existing industrial parks guidelines and tools taking into account new developments and evolving trends in the global development and industrial landscape, as well as inputs from our Member States and partners. For example, the vast majority of industrial zones worldwide are affected by the rapid, global spread of COVID-19. There is a strong need to develop new tools, including industrial parks disaster risk management plans and enhanced environmental, health and safety policies in order to be able to respond more effectively to similar future crises.



More than 70 percent of survey participants have received industrial parks related capacity development requests from their respective government counterparts. The top three priority capacity development areas include: investment promotion and financing; institutional capacity building; and industrial park design and different studies (Feasibility studies, Environment and social impact assessment, etc.).



Development financial institutions such as the World Bank, African Development Bank, Asian Development Banks and European Banks are among the major players in the development of industrial parks in developing countries. This provides an opportunity for UNIDO to strengthen collaboration and partnership particularly with DFIs in the development of industrial parks.

INTRODUCTION

1.1 OBJECTIVE OF THE REPORT

This report presents results from the inception phase of the project entitled “Promoting sustainable industrial parks via South-South and triangular industrial cooperation platform”. The inception phase was intended to further assess the project requirements and to re-evaluate and revise the project work plan. All relevant project stakeholders were consulted throughout this process.

During this phase, a series of consultations were

carried out with partners and institutions in order to collect baseline information and to review the risks, assumptions and needs of proposed activities of the project. In preparation for this report, a survey was conducted to identify priority capacity development needs of Member States, especially PCP and CP countries. It is foreseen, that the findings and recommendations derived from the inception phase will be shared with all relevant UNIDO departments and with external partners.

1.2 PROJECT OVERVIEW

1.2.1 Defining sustainable industrial parks

UNIDO defines industrial parks as “a tract of land developed and subdivided into plots according to a comprehensive plan with provision for roads, transport and public utilities with or without built-up (advance) factories, sometimes with common facilities and sometimes without them, for the use of a group of industrialists” (UNIDO, 1997). Industrial parks and other location specific industrial development policy instruments are important for sustainable industrialization. Therefore, they are perceived as key to national progress on the Sustainable Development Goals (SDGs), in particular ISID in developing countries. Carefully designed parks with both soft and hard infrastructure help overcome business constraints to firm entry into manufacturing. In addition, they facilitate “high productivity, stimulate innovation, promote investment and foster social inclusion and environmental protection”. For example, the 2019 Africa SDG Index and Dashboards Report identified

Integrated Agro-industrial Parks in Ethiopia as one of the best practices on SDGs implementation efforts in Africa.

The principal rationale for implementing industrial parks is to enable “industry to settle and develop at a specific location that is planned and improved to that effect”¹. The fundamental concept of a park is that it is an alternative policy framework, developed by government, to promote policy objectives of government. Sometimes this involves a specified geographical region, but just as often it involves a specific industry. Many terminologies are used to explain location-specific industrial development policies. There are about 80 different terminologies used to designate industrial parks, among which special economic zones (SEZs), free trade zones (FTZs), industrial parks (IPs), free ports (FPs), export processing zones (EPZs), free zones (FZs) are frequently used terms.

¹) UNIDO, Industrial Estates in Europe and Middle East (1966)

1.2.2 Emerging international trends

The practice of industrial parks gained popularity as a policy instrument since the 1990s (Economist, 2015). In 2008, there were about 2,301 industrial parks operating in 119 developing countries and that the industrial parks accounted for approximately \$200 billion in exports per year and

1.2.3 Major challenges and bottlenecks

Industrial park programmes address environmental and sustainability issues. Sustainability covers a wide spectrum of approaches but they all lead to more sustainable economic development. Environmental impact assessment is critical to assess the suitability of the proposed project location from an environmental perspective. Adequate and effective environmental protection measures need to be adopted to minimize the environmental impact of industrial parks due to activities related to preconstruction, preparatory construction, machinery installation and various other production stages. Additionally, it must be recognized that large quantities of wastewater, air emissions, and solid waste are produced by the industrial parks. Therefore, to avoid becoming a pollution hotspot, industrial parks must have space to accommodate proper treatment and disposal facilities (IAIPs, 2016).

Despite its potential for advancing industrialization and structural transformation, developing and

employed around 40 million people directly within the developing countries (FIAS, 2008). The recent study conducted by UNCTAD estimated the number of industrial parks or zones to 5,383 across 147 countries (UNCTAD 2019). This number does not include single enterprise zones.

managing an industrial park is a complex process as it involves various actors and processes. The development of industrial parks requires a collaborative multi-stakeholder approach based on strong stakeholder engagement and solid partnerships. However, many developing countries have limited capacity to plan and implement industrial park initiatives adequately. Without careful planning and development, industrial park development programs often produce white elephants; create land speculation and provide support to favored firms. Some of the factors often suggested to explain the failures of industrial parks are mostly broad, for example, poor sector targeting; poor choice of location; insufficient investment in infrastructure; poor implementation capacity of the public institutions etc. Most of these limitations can be attributed to the limited capacity of developing countries to develop and administrate industrial parks.



1.2.4 Sustainable industrial parks and UNIDO

Over the past four decades, UNIDO has been promoting and supporting industrial park development by assisting Member States in the planning and establishment of industrial parks to support sustainable industrial development. UNIDO considers industrial parks are a feasible, innovative and integrated intervention, which can be used to support countries, especially developing countries and middle-income economies, in accelerating their inclusive and sustainable industrialization and structural transformation. Industrial parks can help to overcome business infrastructure constraints and barriers to firm entry into the markets. Industrial parks have the capacity to generate high productivity, stimulate innovation, promote investment and foster social inclusion and environmental protection.

As part of its holistic approach, UNIDO provides technical assistance to Member States to develop industrial parks. The development of inclusive and sustainable industrial parks are also instrumental in the implementation of the Programme for Country Partnership (PCP), which is UNIDO's innovative multi-stakeholder partnership model to accelerate ISID in Member States, and the Country Programmes (more on figure 6: industrial parks and PCP/CP countries).

UNIDO provides technical support in infrastructure development, complementing these efforts with appropriate policy analysis and advice to support the operationalization of industrial parks. Through the PCP, UNIDO supports Member States to mobilize diverse partners, financial resources and knowledge in order to create the synergies required to promote and implement industrial development, and to maximize development opportunities following the establishment of industrial parks. For example, in Ethiopia, UNIDO is providing technical cooperation services to the government in developing the first four of seventeen Integrated Agro-industrial Parks (IAIPs) to be established in the country. UNIDO is

providing similar assistance to the Government of Senegal to establish three industrial parks/SEZs and three integrated and competitive agro-poles.

UNIDO also consolidates best practices and develops the necessary guidance tools to support Member States and partners on issues related to industrial park planning, operation, financing and management. In this regard, UNIDO's first guidelines for the establishment of industrial estates in developing countries were launched as early as 1978. Since then, the Organization has been consolidating knowledge and best practices in the form of a guidance framework, as well as by organizing international knowledge sharing platforms. Multi-stakeholder partnerships for the consolidation of industrial parks knowledge gained momentum in 2017, when UNIDO produced an international framework for eco-industrial parks in partnership with the World Bank Group and the German Development Agency (GIZ). Likewise, in 2019, "International guidelines for industrial parks" and country case studies (China and Peru) were developed by UNIDO's cross-disciplinary team on industrial parks (CDTIP) with the strong technical and financial support from the Government of China.

These knowledge products and tools have provided stakeholders with guidance on international good practices regarding industrial park development, operation, promotion and regulation. They also sought to help industrial park stakeholders to manage risks and to provide a practical tool to measure and enhance industrial park performance. That being said, most of these tools offer a general reference framework to assist industrial park related decision-making. A range of specific derivative documents and tools, including those focusing on a specific type of parks, should be developed to supplement the existing guidelines and frameworks.

1.3 PARTNERS AND STAKEHOLDERS

In order to ensure commitment and ownership of the project, key partners were involved in the early stages of project planning. This approach has the added benefit of pooling together the knowledge and experience of stakeholders helping to ensure

that the project is as robust as possible. The project will be implemented in collaboration with various partners, that will contribute in their respective field of knowledge and expertise, as indicated in Table 1.

STAKEHOLDERS	RESPONSIBILITIES
Department of Programmes and Partnership Coordination and other departments ²	<ul style="list-style-type: none"> Coordinate the design and implementation Oversight and monitoring of the implementation of the project Fund mobilization
Ministry of Commerce (MOFCOM) of China	<ul style="list-style-type: none"> Financial support and policy guidance
Implementing partners:	<ul style="list-style-type: none"> Capacity building, such as technical trainings and studies Organize seminars and study tours Support networking
<ul style="list-style-type: none"> a. Asia-Pacific Finance and Development Institute b. Center for International Knowledge on Development c. Chinese Academy of International Trade and Economic Cooperation d. Chinese Academy of Social Science 	
Other UNIDO partners such as:	<ul style="list-style-type: none"> Capacity building for institutional development Organize joint training Conduct joint studies and develop tools
<ul style="list-style-type: none"> a. Forum Macao b. African Development Banks c. United Nations Office for South-South Cooperation d. Food and Agricultural Organization e. Financial Center For South-South Cooperation f. The World Bank Group g. China Exim Bank h. Africa Exim Bank i. African Union Development Agency j. Peking University, k. Tsinghua University l. South East University of China 	

Table 1: Project stakeholders and implementing partners

In addition to the above identified partners, the project will mobilize new partners and stakeholders

throughout the project cycle to create a network of industrial park experts and institutions.

²) Cross-Disciplinary Team on Industrial Parks comprising of representatives from different departments will provide advisory support for the project implementation,

1.4 TARGET BENEFICIARIES

The ultimate beneficiaries of this project are governments, both at national and regional levels, and private institutions through capacity-building and institutional development. The beneficiaries will also include institutions working on industrial development and directly involved in PCP/CP coordination (such as Ministry of Industry, Investment Promotion Agency, Ministry of Environment, Industrial Parks Agency, Ministry of Economy, etc.) and independent government agencies responsible for industrial parks development and management, who will benefit from capacity building support. The project further envisaged improving both the efficiency and effectiveness of local institution's industrial knowledge management and strengthen networking by fostering knowledge sharing between stakeholders.

The expected outputs of the project will support PCP implementation and accelerate the achievement of UNIDO's ISID mandate. The project will contribute to the implementation of the 2030 Agenda for Sustainable Development and the 17 Sustainable Development Goals (SDGs), specifically SDG 17, SDG 9 and SDG 5. It will also contribute to the Buenos Aires Plan of Action (BAPA) for Promoting and Implementing Technical Cooperation among Developing Countries (TCDC) and the Nairobi outcome document of the High-level United Nations Conference on South-South, including through the operationalization of the UNIDO Policy on South-South and Triangular Industrial Cooperation.

1.5 PROJECT IMPLEMENTATION

The project is a multi-stakeholder partnership from project design to implementation. It links the development efforts from both the public and private sectors to support the development and

management of industrial parks in developing countries. The project will have three components/ steps overseen by the Project Manager.



METHODOLOGICAL APPROACH OF THE STUDY

The inception report is prepared based on the inputs from UNIDO Field Offices and review of in-house and external documents. The inception report incorporates inputs from the representatives of UNIDO Field Offices, who completed a survey, which was developed to identify industrial parks related demands and capacity gaps and was conducted between 1 and 10 July 2020. UNIDO representatives from all geographical regions participated in the survey. The survey results comprise the responses of 24 UCRs, 15 URs, 1 PCP Manager, 1 CP Manager, 1 Country Programme Coordinator, 1 Programme

Officer, 1 National Programme Officer and 1 Project Manager.

The survey covers 43 countries: 17 from Africa, 4 from Arab Region, 9 from Asia and the Pacific, 4 from Europe and Central Asia and 9 from Latin American and the Caribbean. The majority of countries covered in the survey are from Africa, representing about 40 percent, followed by Asia & the Pacific, and Latin American & the Caribbean, each representing 21 percent, as illustrated in the Figure 1.

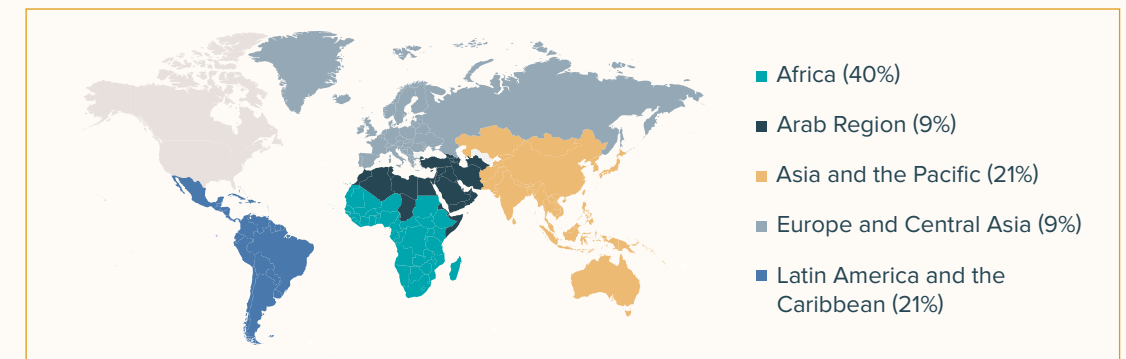


Figure 1: Regions covered in the survey in percentage

The survey was conducted taking into account the importance of targeting the Programme for Country Partnership (PCP) and Country Programme (CP) countries. In this context, 9 out of 10 PCP countries

and 22 CP countries (CP's in formulation and implementation phase) participated in the survey, as illustrated in Table 2.

Africa		Arab States	Asia and the Pacific	Europe and Central Asia	Latin-America and the Caribbean
Burkina Faso	Mali	Algeria	Afghanistan	Armenia	Bolivia
Cape Verde	Mauritania	Egypt	Bangladesh	Kyrgyzstan	Brazil
Congo (DRC)	Mozambique	Morocco	Cambodia	Russian	Colombia
Ethiopia	Guinea-Bissau	Sudan	Indonesia	Russia	Costa Rica
Gambia	Rwanda		Iran	Turkey	Ecuador
Ghana	Senegal		Laos		Guatemala
Côte d'Ivoire	South Africa		Pakistan		Mexico
Liberia	Zimbabwe		Philippines		Nicaragua
Madagascar			Vietnam		Peru

Table 2: List of countries covered by the SIP survey

In addition, desk research and literature review were conducted as part of the preparation of the report. Sources for this report include, but are not limited to, the original PCP/CP programme documents, monitoring reports (such as progress and financial reports), evaluation report, conference

reports, country diagnostic studies, back-to-office mission report(s) and relevant correspondence. Additionally, capacity development requests from Member States were also used as supplementary material.

INCEPTION PHASE RESULTS AND RECOMMENDATIONS

3.1 PROJECT LAUNCH AND INCEPTION PHASE

The project's inception phase commenced in July and is expected to be completed in December 2020. During this phase, a series of consultations will be carried out with project partners. Further, a survey was conducted in order to collect baseline information and to review the risks, assumptions of project activities as well as the demands from Member States. Efforts were made

to identify capacity building needs for industrial park development in developing countries and economies in transition. The findings and recommendations of the inception phase will be shared with collaborating partners and donor. Some of major milestones and activities completed during the inception phase are illustrated in Table 3.

No.	ACTIVITY	STATUS
1	Identify key project implementing partners and sign the project document	<ul style="list-style-type: none"> Project implementing partners identified and communication established Project document signed by the Deputy Representative of the Permanent Mission of China to UNIDO and the Director General of UNIDO The launching of the project promoted via media
2	Set up project management team and establish the project implementation and coordination team	<ul style="list-style-type: none"> Project Management Team established and key staff engaged.
3	Assess the capacity needs of Member countries and possible interventions required	<ul style="list-style-type: none"> Key capacity development needs identified particularly for PCP and CP countries and redressal activities prioritized
4	Determine the need to develop industrial park guidance tool	<ul style="list-style-type: none"> A survey conducted revealed that there is a strong need to develop guidance tool
5	Establish collaboration with other projects	<ul style="list-style-type: none"> Collaboration mechanism identified and engagement initiated
6	Identify vendor company developing SIP knowledge hub	<ul style="list-style-type: none"> Detailed ToR and technical specification prepared Contract signed with vendor to develop SIP knowledge hub
7	Training syllabus for industrial parks developed	<ul style="list-style-type: none"> Training syllabus detailing the first round of SIP training prepared Partners for the first round of the training identified- AFDI and Forum Macao
8	Develop a work plan for year one	<ul style="list-style-type: none"> Work plan for the first year is developed and included in the inception report
9	Stocktaking of existing tools and ongoing industrial parks project	<ul style="list-style-type: none"> Existing industrial parks tools and studies gathered, and ongoing industrial parks project identified.

Table 3: Summary of activities and project inception phase milestones

3.2 INCEPTION PHASE FINDINGS AND RECOMMENDATIONS

The theory of change of the project was developed during the inception phase. A theory of change model illustrates the mechanisms and processes and explains how the project has an impact from a beneficiary’s point of view and achieves its targeted

results. The theory of change of the project is developed based on the project specific objectives and outputs, which are focusing on the following six topics:



The project theory of change starts from a baseline analysis of the context and issues related to industrial parks development in developing countries. It then maps out the logical sequence of changes that are anticipated as being necessary amongst stakeholders and in the contextual conditions to support the desired short-term and long-term change. The theory of change framework

for the project can guide stakeholder engagement approaches, communication, partnerships, and monitoring and tracking progress towards impact within the lifetime of the project and beyond.

The developed theory of change provided hereunder in Figure 2 illustrates a ‘description of a sequence of events that is expected to lead to a particular desired outcome both in the short and long term.

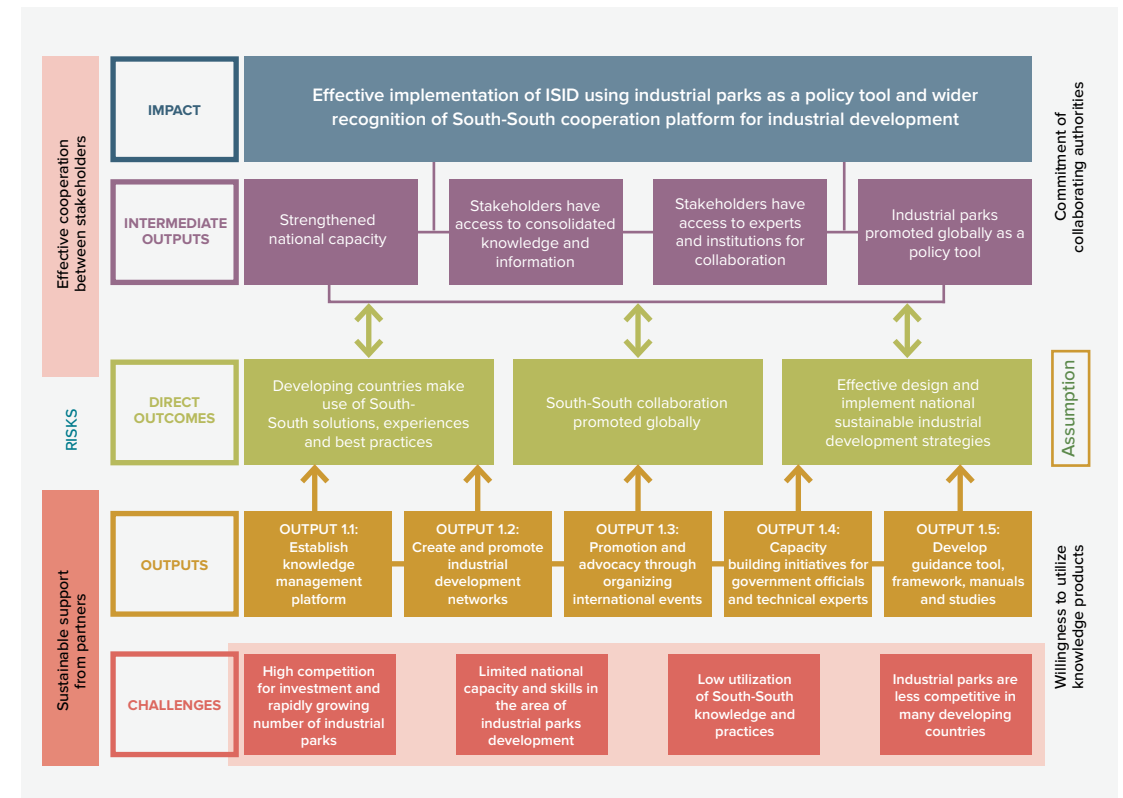


Figure 2: The project theory of change

3.2.1 Improve knowledge management

Industrial parks have a strong track record in helping foster economic development by providing an institutional framework, modern services, and physical infrastructure that may not be available in the rest of the country. While many countries have made significant progress to achieve ISID by taking advantage of the dynamic potential of industrial parks, some projects are failing to achieve the desired objectives for many reasons. When it comes to questions of what works and why, under what conditions, there are large knowledge gaps that can be addressed through a knowledge platform.

Making industrial park information and best practices accessible became crucial to making information driven decision making about whether

or not to invest in industrial park development. There are also many institutions, including universities, governments, research institutions, development agencies and multilateral donors that undertake research studies on industrial parks. Moreover, various practitioners also produce practical knowledge on how to develop and operate industrial parks. However, most of the knowledge and best practices produced by these institutions are largely scattered and the different types of knowledge are not always shared and synthesized in order to inform better business models for industrial parks. Industrial development knowledge gained from development solutions is permanently at risk of getting lost or forgotten, if not properly documented, managed and shared.

Therefore, in order to continue to provide structured technical assistance in the field, UNIDO needs to consolidate in-house experiences and create innovative mechanisms for creating and managing knowledge on industrial parks. Our analysis of the survey data also confirmed the existence

of strong need for developing a knowledge management system. More than 80 percent of the Field Office representatives who took part in the survey stressed the importance of establishing a dedicated industrial parks knowledge hub and center of excellence, as highlighted Figure 3.

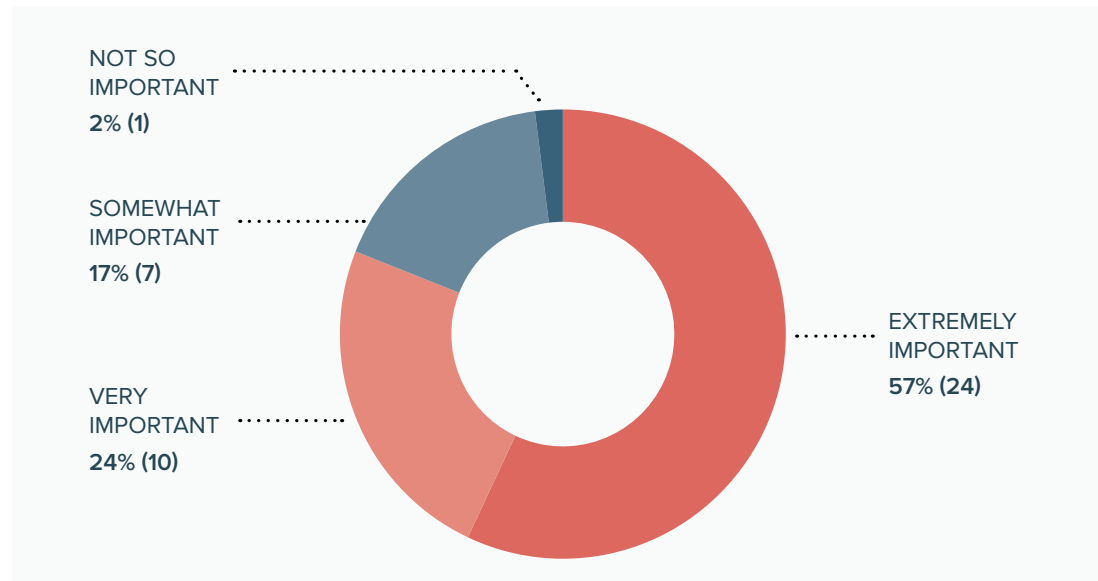






Figure 3: The need for industrial parks knowledge hub and center of excellence

In this context, in line with the Output 1.1, the project will develop a well-functioning and user-friendly knowledge management platform or

knowledge hub. The knowledge hub will provide the following functions:

- 
KNOWLEDGE REPOSITORY: creating industrial parks resource center or database where information related to industrial and SSTIC (publications, videos, guidelines, etc.) are expected to be grouped and archived in an open domain accessible to stakeholders.
- 
LEARNING TOOL: serve as a capacity building platform to improve capacity for human resource development through training, webinars and seminars.
- 
NETWORKING PLATFORM: provide a networking framework for interaction and cooperation with practitioners and institutions such as universities, government authorities, research institutions, development agencies and multilateral donors. It will provide stakeholders with access to other industrial park peers and experts.
- 
KNOWLEDGE EXCHANGE TOOL: promotion and advocacy to disseminate information, best practices and knowledge on industrial parks, including featuring model industrial parks from around the world for benchmarking, event promotion and streaming services

3.2.2 Create and strengthen networks

Industrial park development involves a large number of actors and stakeholders, including institutions at various levels of government, businesses, financial institutions, development partners, education and training institutions, contractors, research centres, environmental and community organizations, and individual experts. As these institutions or actors have specialized knowledge and best practices, the manner in which these stakeholders interact can influence the planning and development of parks in either a positive or a negative way. Networking is a valuable way to bring together these actors, to learn from the success of others, and share your experience with others. Establishing and maintaining an innovative network or industrial parks community

will enable developing countries with industrial parks development plan to easily identify and communicate with contractors or experts.

The establishment of a networking system was highlighted in Output 1.2 of the project document. A particular focus will be given to South-South centres and networking services to stimulate dialogues and initiatives oriented towards increasing Southern solidarity and mutually beneficial partnerships to achieve industrialization. The potential role of networking platforms has been recognized in a number of high-level documents such as the Nairobi outcome document adopted in 2009 and the Buenos Aires Outcome Document adopted in March 2019.

3.2.3 Stimulating knowledge sharing and peer learning

While many industrial parks development challenges are common across the world, the solutions to them are usually local. Knowledge

sharing and peer learning mechanisms can disseminate solutions and best practices.

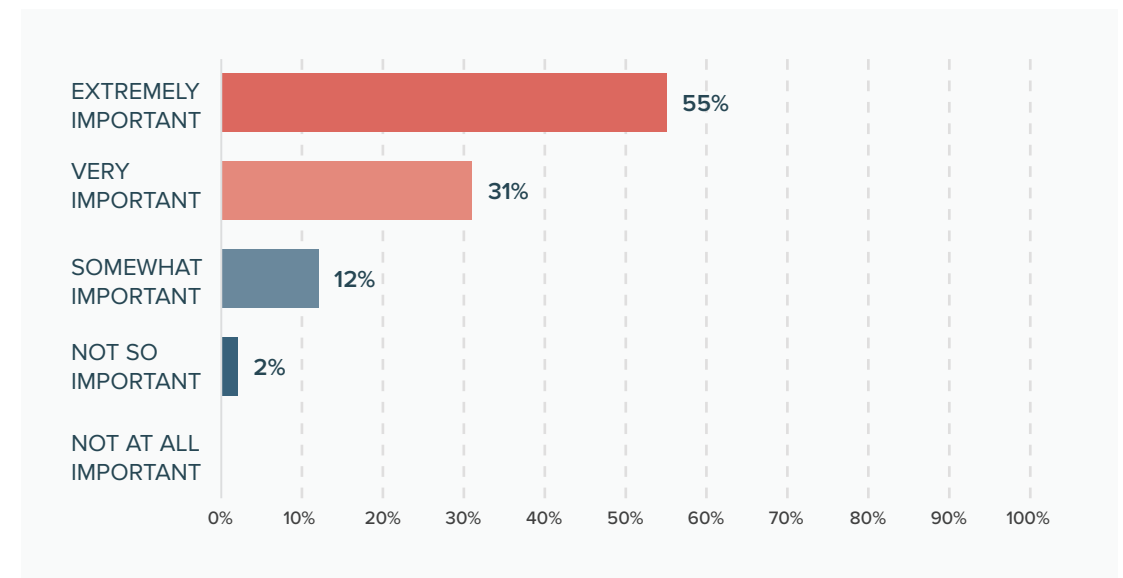


Figure 4: Importance of industrial parks knowledge-sharing events

However, quite often industrial parks development knowledge, rather than being documented and shared, is simply left behind and forgotten. This fact was corroborated by the sustainable industrial parks survey conducted in July 2020, where 86 percent of survey respondents rated the importance of knowledge sharing as ‘extremely important and very important’, as illustrated in Figure 4.

As highlighted in Output 1.3 the project will create a platform for the exchange knowledge and experiences to improve existing practices of industrial park development and provide an effective learning mechanism in the context of SSTIC. The project will provide knowledge sharing services by organizing and supporting international, regional and local events such as conferences, forums, workshops, technical meetings and webinars. This will allow UNIDO’s Member States and partners to explore the potential for synergies and strong collaboration.

The main target groups of the knowledge sharing events include representatives of governments, private sector engaged in the development and

management of parks, academia, industrial parks associations, trade unions, international financial institutions, donors and research institutions. The events will feature presentations and panel discussions on a wide range of international knowledge and experiences on different aspects of industrial parks, such as design, planning, and construction, park operation and maintenance, investment and financing, sustainability, public-private development, sustainable energy, SMEs development, clustering and agglomeration, skills development and technology transfer and partnerships, among other topics.

The knowledge sharing events will foster partnerships with Southern countries to improve industrial production capacity through industrial parks development; to stimulate dialogues and initiatives oriented towards increasing Southern solidarity and mutually beneficial partnerships to achieve industrialization and to increase awareness about Southern narratives, solutions and alternatives for positive and Southern-led industrial park development.

3.2.4 Enhancing institutional and human capacity

RAPID PROLIFERATION OF INDUSTRIAL PARKS

The 2030 Agenda for Sustainable Development recognizes the importance of inclusive and sustainable industrialization and the infrastructure that supports it in order to eradicate poverty. Since the last few decades, industrial parks became one of the key effective policy instruments, in particular for Southern countries, to promote inclusive and sustainable industrialization and the structural economic transformation. While they primarily serve to overcome high production and transaction costs stemming from lack of infrastructure, with the focused complementary interventions their industrial agglomeration facilitates, they can also help reduce information asymmetries, facilitate

access to finance, and help to strengthen regulatory institutions.

The practice of industrial parks gained popularity as a policy instrument in developing countries since the 1990s. Many developing countries implemented industrial parks to attract foreign investment and stimulate economic growth and technological innovation and increase exports and employment. UNCTAD’s 2019 report shows that there are at least 5,383 industrial parks and SEZs in 147 economies, almost three quarters of developing economies and almost all transition economies.

INDUSTRIAL PARKS AND UNIDO’S PROGRAMMATIC APPROACHES

According to the survey conducted as part of this project, industrial parks are built and operated in more than 95 percent of PCP and CP countries

represented in the survey, 79 percent of which are under development, as illustrated in Figure 5.

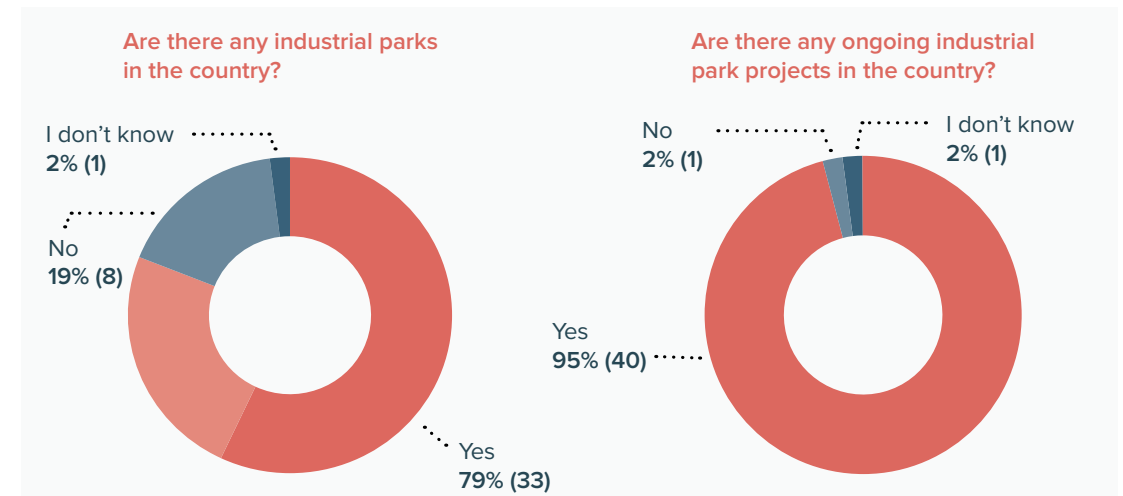


Figure 5: Pipeline and operational industrial parks in PCP and CP countries

The development of industrial parks is instrumental in the implementation of the Programme for Country Partnership (PCP) - UNIDO’s innovative multi-stakeholder partnership model to accelerate ISID

in Member States - and Country Programmes (CPs). For example, as illustrated in Figure 6, industrial parks are a core component of all 9 PCP countries included in this survey.

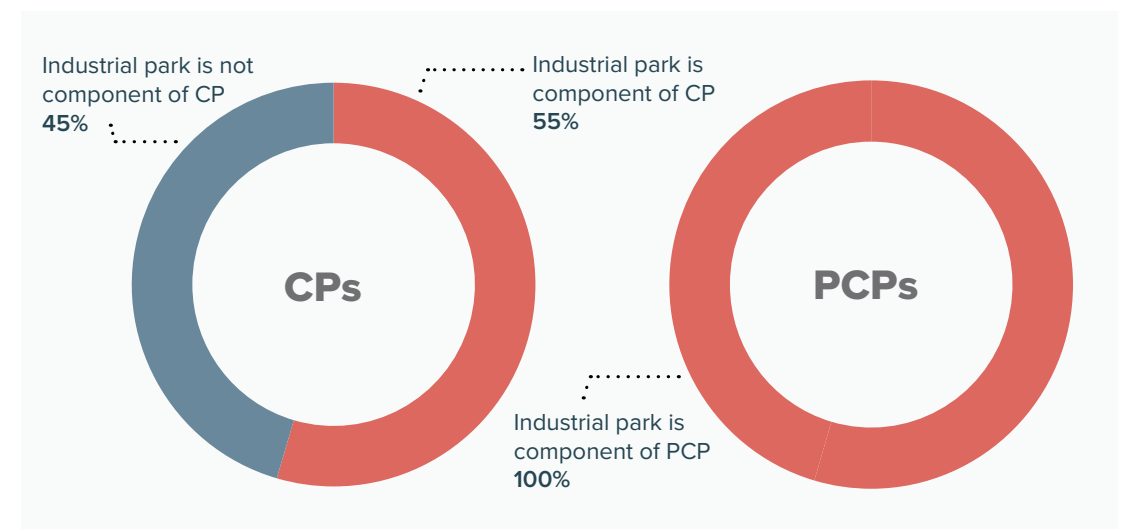






Figure 6: Industrial parks and PCP/CP countries

In addition, about 55 percent CP countries participated in the survey have industrial parks as a CP component. UNIDO is currently supporting about 30% of the ongoing industrial parks projects, while

70 percent are supported by other stakeholders. According to the survey results, the top five types of industrial parks related support that UNIDO is currently providing in PCP and CP countries include:

-  Overall coordination and management
-  Skills development trainings
-  Infrastructure development and construction
-  Conducting studies (pre-) feasibility studies, ESIA, etc
-  Value-chains analysis support

THE CHALLENGES AND BOTTLENECKS OF INDUSTRIAL PARKS IN DEVELOPING COUNTRIES

The challenges and bottlenecks related to industrial park development can be categorized into three groups, based on the industrial parks development life-cycle: planning, design and construction challenges; industrial park operation, management and investment challenges, and institutional and knowledge related challenges.

(organized in percentage based on the frequency of responses) can be found in Table 4. The three main bottlenecks of industrial parks development, according to respondents, are limited technical skills, lack of capacity to attract investment and absence of a functioning stakeholders coordination mechanism. The project aims to address all three of these challenges through its various outputs.

Specific industrial park development challenges and bottlenecks identified by survey participants

PLANNING, DESIGN AND CONSTRUCTION CHALLENGES	OPERATION, MANAGEMENT, AND INVESTMENT CHALLENGES	INSTITUTIONAL AND KNOWLEDGE MANAGEMENT CHALLENGES
Limited technical skills 76%	Lack of capacity to attract investment 88%	Absence of proper stakeholders, partners and donor coordination mechanism 85%
Absence of proper stakeholders and partners coordination mechanism 74%	Absence of guidelines to operate industrial parks 67%	Limited access to industrial parks information (publication, tools, guidelines) 68%
Industrial park built, but not enough tenants moved in or settled 56%	No industrial park performance mechanism 67%	No industrial park performance mechanism 65%
Difficult to find developer or operator 38%	Absence of industrial park operation manual 55%	Park managers inadequate training 59%
Industrial park planned but, never built 32%	Industrial park causes environmental pollution 32%	Limited park employee training 56%

Table 4: Major industrial parks challenges and bottlenecks in developing countries (ranks in percentage)

CAPACITY DEVELOPMENT NEEDS AND PRIORITIES

Providing institutional and human capacity development services, as indicated in output 1.4 of the project, can be considered a key intervention to improve the development of industrial parks in developing and transitional economies. The

high demand for capacity building support is reflected in the results of the survey, which show that more than 70 percent of respondents have received capacity development requests from their respective government counterparts.

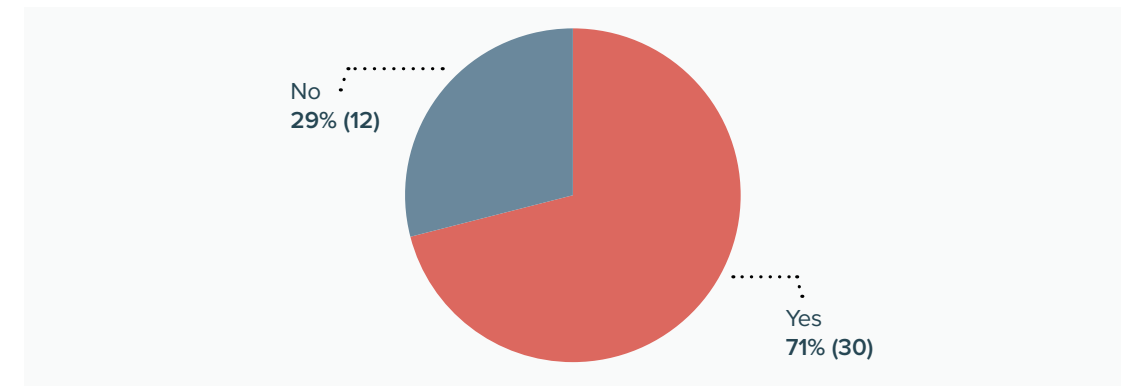


Figure 7: Industrial park-related capacity-building requests from the government counterpart

Regarding the type of capacity support, the top three priority capacity development areas identified by the survey respondents include: investment

promotion and financing, institutional capacity building and industrial park design and different studies.

MAJOR CAPACITY DEVELOPMENT NEEDS	RANKS IN PERCENTAGE
Investment promotion and finance	88%
Institutional capacity building	82%
Design and studies (feasibility studies, design, ESIA, etc.)	76%
Environment and waste management	76%
Industrial park operation and management	68%
Skills development	50%
Provide normative tools	38%
Knowledge sharing events	29%

Table 5: Major industrial parks capacity development needs in developing countries

INDUSTRIAL PARKS TRAININGS

In addition, more than three fourth of the respondents stressed the importance of providing capacity development training as highlighted in Table 6. The project will design and provide online, face-to-face or blended trainings to government

officials in developing countries and economies in transition. The main goal of the training programme is to enhance industrialization and strengthen regional economies in target countries through developing industrial parks or zones. It will strengthen the

capacity of professionals and policy makers and effectively gear their interventions towards achieving the objectives of industrial parks. The contents of the training will be tailored to the actual needs of the Member States. Trainings will be provided in

different phases and priority countries, focusing on PCP/CP countries, Asian Pacific Countries (APC) and member countries of the Forum for Economic and Trade Co-operation between China and Portuguese-speaking Countries (Macao).

ANSWER CHOICE	RESPONSES (%)	NUMBER OF RESPONDENTS
Extremely important	52%	22
Very important	36%	15
Somewhat important	10%	4
Not at all important	2%	1
Not so important	0%	0
TOTAL RESPONDENTS: 42		

Table 6: Rating the Importance of industrial parks trainings

Industrial parks have different components and processes starting from planning to operation. Different countries are at different stages of

development and their training needs also vary from one another. The top training areas identified by survey participants are indicated in the Table 7.

TRAINING PRIORITIES	RESPONSES (%)
Promoting investment and mobilizing finance	79%
Infrastructure financing and investment facilitation	71%
Circular economy business model	71%
Feasibility studies	56%
Industrial policy and regulatory framework	47%
Industrial park operation and management	47%
Partnership and collaboration	41%
Planning, design, and construction	35%
Project design and management	24%
Master planning and engineering design	24%
Effective business negotiation techniques	21%

Table 7: Priority areas for industrial parks training

3.2.5 Provide guidance framework and tools

UNIDO'S GUIDANCE TOOLS AND REQUESTS FROM DEVELOPING COUNTRIES

UNIDO consolidates best practices and develops the necessary guidance tools to support its Member States and partners on issues related to industrial park development. In this regard, UNIDO's first industrial parks knowledge tool "Guidelines for the establishment of industrial

estates in developing countries" was launched as early as 1978. Since then, the Organization has been consolidating knowledge and best practices in the form of guidance framework, toolboxes and country studies. In 2017, UNIDO produced "A Practitioner's Handbook for Eco-Industrial Parks:

Implementing the International EIP Framework" and "A Practitioner's Handbook for Eco-Industrial Parks: Toolbox "an international framework for eco-industrial parks in partnership with the World Bank Group and the German Development Agency (GIZ).

Likewise, in 2019, "International guidelines for industrial parks" and three country case studies (China, Ethiopia and Peru) were developed by UNIDO's cross-disciplinary team on industrial parks (CDTIP) with strong technical and financial support from the Government of China. The guidelines were

prepared by combining in-house technical expertise with international best practices and serving as a useful guide and reference tool by the different stakeholders, including industrial park regulators, developers, operators, tenants, partners (such as multilateral development agencies) and financial institutions. As indicated in Table 8, the results of the survey also show that requests related to industrial parks guidance tools and manuals constitute the most important request from Member States for capacity development.

ANSWER CHOICES	RESPONSES (%)	NUMBER OF RESPONDENTS
Institutional development	57%	24
Guidelines, tools and manuals	55%	23
Human resource development (e.g. training)	50%	21
Policy support	48%	20
Other	43%	18
Technology transfer	40%	17
Study tours	40%	17
Provide information and data	29%	12
Establish center and network	21%	9
TOTAL RESPONDENTS: 42		

Table 8: Capacity development request from developing countries (%)

RESPONDING TO GLOBAL CRISIS

UNIDO should regularly review and update existing industrial parks tools taking into account new developments and evolving trends in the global development and industrial landscape, as well as inputs from our Member States and partners. For example, the vast majority of industrial parks worldwide are affected by the rapid, global spread of COVID-19. This fact proved the need to develop new and resilient response approaches in order to overcome the global development emergency. A study conducted by Kiel Institute for the World Economy with inputs from UNIDO shows two out of three industrial zones are considering initiatives

in order to be able to respond more effectively to similar future crises, including disaster risk management plans and enhanced environmental, health and safety policies.

In this context, the project will support the development of new and specialized industrial parks tools focusing on different components of industrial parks to complement existing tools and proactively respond to emerging challenges. Some of the policies and measures that will enable industrial parks to respond more effectively to similar future crises are indicated the Figure 8.

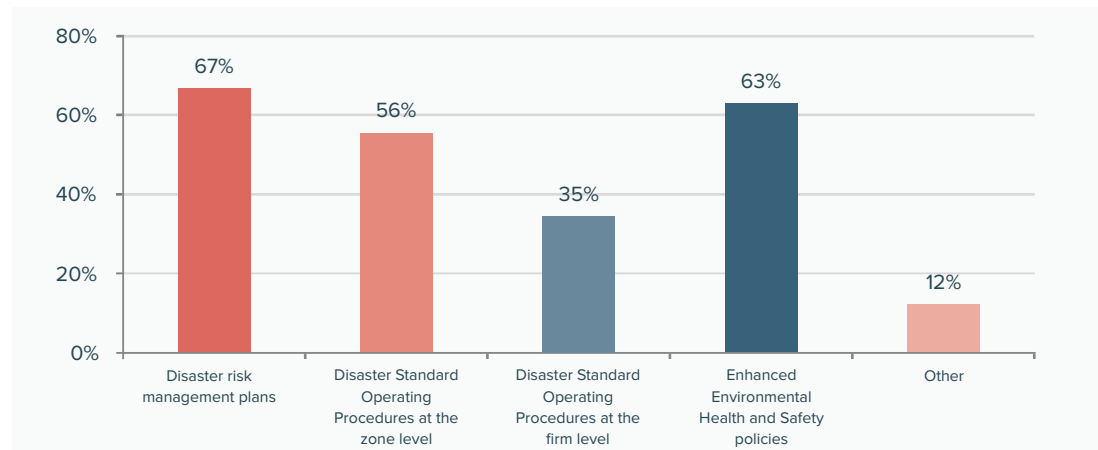


Figure 8: Measures to respond more effectively to a similar future crisis³

3.2.6 Strengthen collaboration and partnership for industrial development

PROMOTING MULTI-STAKEHOLDER PARTNERSHIP

UNIDO is among the first multilateral institutions involved in providing technical assistance and producing knowledge products to support the development of industrial parks around the world. In addition, there are also other multilateral actors, particularly development finance institutions (DFIs), actively involved in the development and operation of industrial parks in developing countries and economies in transition. Their participation and engagement ranges from overall project coordination to financing of the industrial park project in full or in part. Some DFIs, such as regional development banks, operate in a specific

geographic region, whereas others such as the World Bank Group operate globally.

Creating partnerships and strengthening collaboration with other industrial parks actors such as DFIs are among the major objectives of the project. The results of the survey shows that the World Bank, African Development Bank, Asian Development Banks and European Investment Banks are among the major players in the development of industrial parks in developing countries as illustrated in Figure 9.

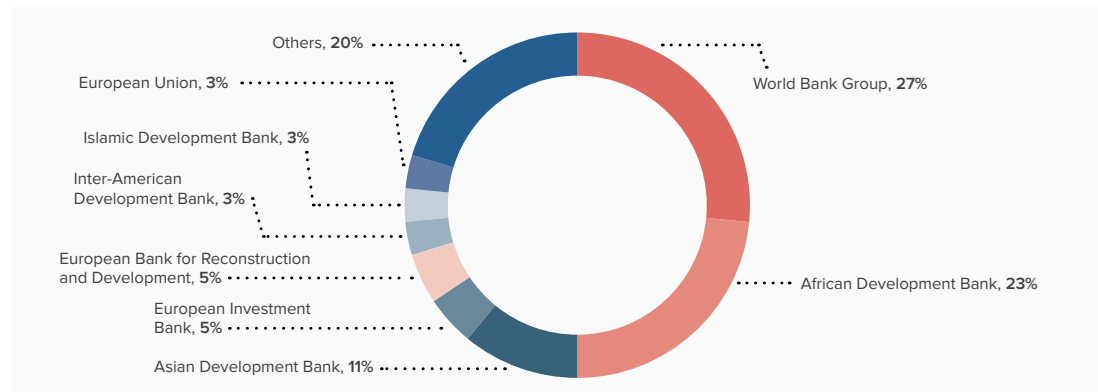


Figure 9: List of multilateral stakeholders involved in industrial park development (%)

3) Free Zones World Economic Barometer, F-WEB NOTE 2020Q2

COORDINATION OF NATIONAL STAKEHOLDERS

Due to its complexity, industrial parks involves many national actors and stakeholders throughout the lifecycle of its development. Some countries have a nodal institution that coordinates the development of industrial parks in collaboration with other domestic and international actors. The results of the survey shows 86 percent of countries represented in the survey have designated authority responsible for industrial park development and

management. While the nodal entity responsible for park development vary across countries, the Ministry of Industry (known by different names) is the prime agency responsible for industrial parks development, followed by investment authority, Ministry of Finance and industrial parks authority, respectively. The complete list of major national nodal institutions responsible for industrial parks development are highlighted in Figure 10.

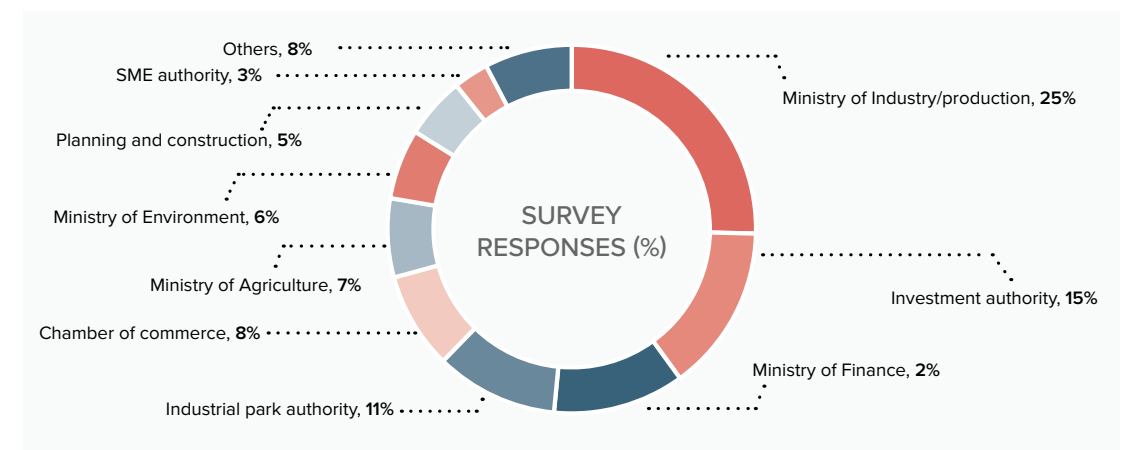


Figure 10: National institutions responsible for industrial parks development

PROMOTING SOUTHERN COUNTRIES INDUSTRIAL DEVELOPMENT USING SOUTH-SOUTH PLATFORM

The 2030 Agenda for Sustainable Development recognizes the crucial role of South-South cooperation in achieving its goals and targets. Sustainable Development Goal 17 (“Strengthen the means of implementation and revitalize the global partnership for sustainable development”) made explicit references to the role of South-South and triangular cooperation (SSTC) in mobilizing additional financial resources for developing countries, enhancing access to science, technology and innovation, enhancing knowledge sharing on mutually agreed terms, as well as implementing effective and targeted capacity-building in developing countries, for the implementation of

all the sustainable development goals. South-South cooperation became a major instrument for achieving the Sustainable Development Goals (SDGs), in particular replicating and upscaling good practices and technology transfer in the development of industrial parks. South-South cooperation complements official development assistance (ODA) to focus on trade facilitation, basic infrastructure and productive capacity.⁴

The Nairobi outcome document adopted in 2009 and the Buenos Aires Outcome Document adopted in March 2019 during the first and second high-level United Nations Conference on South-South

4) UNDP, 2016. Scaling-up South-South Cooperation for Sustainable development

Cooperation stressed the importance of the sharing of knowledge and experiences, trainings, capacity building and technology transfer, including efforts to mainstream gender perspectives, to overcome industrial development challenges. The document also highlighted the need to enhance local capacity in developing countries by supporting local capabilities, institutions, expertise and human resources and national systems. In 2019, UNIDO promulgated a Policy on South-South and Triangular Industrial Cooperation to promote cooperation and knowledge exchange for industrial development. UNIDO also established Centres for South-South Industrial Cooperation in several of the more advanced developing countries.

The South is becoming a major player in world industry and trade. Since the 1980s, its share in world manufacturing added has almost doubled; its share in world exports has more than doubled, and South-South trade is rapidly increasing. Over the past decades, South-South cooperation has become a significant source of financing and global knowledge exchange. For example, industrial parks have played a catalytic role in facilitating industrial upgrading and export-led growth in East Asia.

Southern countries have vast amounts of successful economic and industrial development experiences that could be more widely shared with other developing countries. In this context, the project has a significant role to play in addressing existing gaps with regard to the exchange of knowledge and experience related to industrial park development. One way of doing the South-South knowledge exchange is through matchmaking sub-sector strengths and weakness as illustrated in Figures 11A and 11B.

Sectors for industrial knowledge sharing and other capacity building support provided under this project or also other similar South-South projects. About 81 percent of the respondents identified the “agribusiness” as the most important sector that needs support (see Figure 11A). At the same time, about 64 percent of the respondents indicated that “agribusiness” is the most advanced sub-sector with potential for benchmarking (see Figure 11B). This shows the opportunity for matchmaking within and among Southern countries with similar stages of development. SSTIC could thereby serve as an ideal mechanism to bridge the disparity between the supply and demand of sector-specific industrial knowledge among Southern countries.

The analysis of the survey also shows that there is a high demand for capacity building and knowledge sharing for certain sub-sectors. Therefore, it is extremely crucial to prioritize or target these

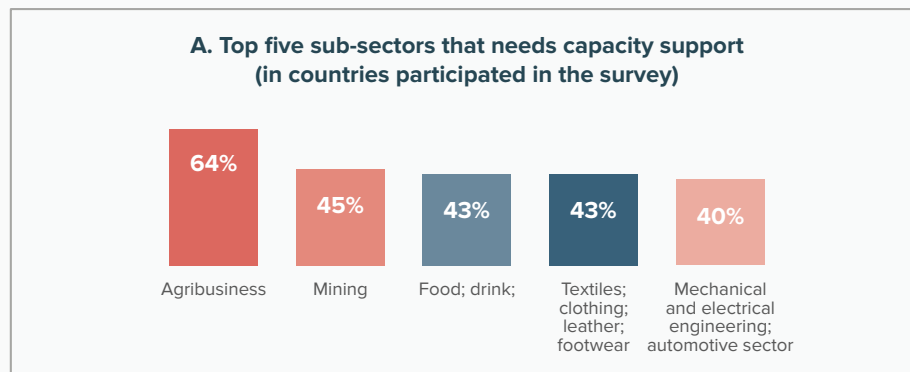


Figure 11A: TOP FIVE SUB-SECTORS THAT NEEDS CAPACITY SUPPORT(%)

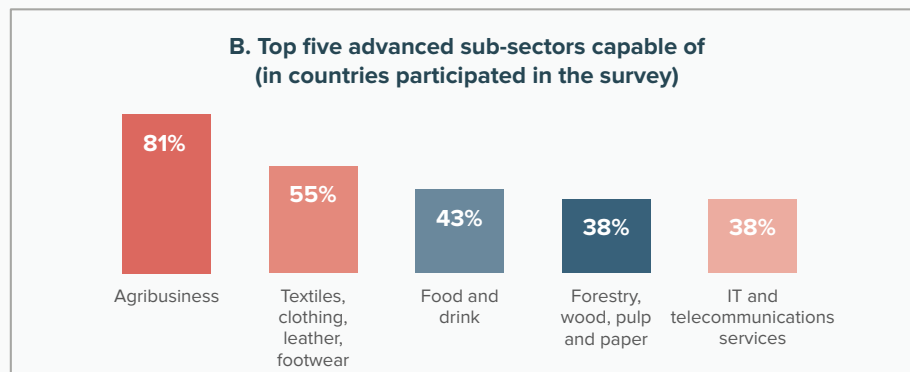


Figure 11B: TOP FIVE ADVANCED SUB-SECTORS (%)

RISK IDENTIFICATION AND MITIGATION

POTENTIAL RISKS	PROPOSED MITIGATION MEASURES	RATING
Effective cooperation between the stakeholders is not achieved.	This risk is addressed by involving all relevant stakeholders. It will also involve awareness-raising and education aimed at achieving cooperation and improved coordination mechanisms.	Medium
Weak coordination and harmonization of the project with other related activities that will be undertaken by other ongoing or pipeline projects.	The project is designed to ensure regular communications and timely information exchange among project owners, implementers and stakeholders. Furthermore, the consultation mechanism initiated by the project among internal and external stakeholders will avoid overlapping activities among and between ongoing and potential projects.	Low
Reliability of the information collected and lessons learned from both internal and especially external	Collection of as many as possible documents from trusted sources and organizations that have experiences related to industrial development. Validating information collected from secondary sources with UNIDO documents.	Low
Achievements are not maintained after the end of project due to, for example, limited resources, etc.	The project will establish a business plan and exit strategy to ensure project sustainability.	Low
OVERALL RISK RATING		LOW

Table 9: Project risk matrix

While the overall risk level of the project is low, there are potential issues that may negatively affect the project. At the core, gathering and presenting information on industrial parks is an exercise in business intelligence and therefore carries many of the same risks that are prevalent in this sector. Firstly, the reliability and accuracy of data sources needs to be ensured whenever possible. This can be done by relying on official sources of information, such as DFIs, government entities and reputable business intelligence providers.

Secondly, there is a risk that information stored on the platform will become outdated in short

order. Specifically information on industrial parks, many of which are still in either the planning or construction stage, will need to be updated once the parks become operational. Information on industrial outputs of specific parks also sometimes only becomes available after a park has completed construction, attracted tenants and started business operations. To mitigate this risk, regular updates will be necessary to ensure the accuracy of information presented on the platform.

An additional risk highlighted in the project document is a potential lack of effective cooperation among the project's main stakeholders. This risk is

addressed by involving all relevant stakeholders in the planning and implementation of the project's activities, particularly in the demand driven design of curricula for capacity building activities. It will also involve awareness-raising and education aimed at achieving cooperation and improved coordination mechanisms. The project is further designed to ensure regular communication and a timely exchange of information among project owners, implementers and stakeholders. Furthermore, the

consultation mechanism initiated by the project among internal and external stakeholders will avoid overlapping activities among and between on-going and potential projects.

There is some risk associated with ensuring the long-term sustainability of the project. Since content on the online platform, as well as networks with partners and coordination among stakeholder will require a somewhat constant level

of maintenance in order to produce the desired results, ending work on the project abruptly could diminish the long-term impact of the project's activities. Therefore, a comprehensive exit strategy will need to be elaborated to ensure the long-term sustainability of the project, taking into account the needs and demand of stakeholders.

Lastly, the current global emergencies related to COVID-19 crisis also negatively affect some of the activities planned as part of the project such as organizing skill development trainings and industrial parks conferences. One of the mitigation strategies in place is to switch some of the activities to online form.



COMMUNICATION AND MONITORING PLAN

5.1 COMMUNICATION AND VISIBILITY PLAN

A communication and visibility plan will be implemented to ensure that all interested parties are aware of the project’s objectives, activities, achievements and impact. The project team members will impart the message through all available media.

The project is working on its identity, and branding that will be consistently applied on all visibility and communication materials and activities, as well as on reports and presentations. Promotional materials such as posters, roll-ups, notepads and pens will be produced and distributed to counterparts and partners.

5.2 MONITORING PLAN FOR PROJECT IMPLEMENTATION

The project was developed in line with results-based management (RBM) principles and UNIDO’s Integrated Results Performance Framework (IRPF) tools. Results-based M&E systems have been successfully designed and used to monitor and evaluate at all levels—outputs and outcome. Information and data can be collected and analyzed at all levels to provide feedback at many points in

time. In this way, the information can be used to better inform key decision makers, the public and other stakeholders. Monitoring and evaluation can and should be evident throughout the life cycle of a project, as well as after completion. M&E—with its continuing streams of data and feedback—has added value at every stage from design through implementation and impact.

TYPE OF M&E ACTIVITY	RESPONSIBLE PARTIES	TIME FRAME
Project coordination meeting	UNIDO Project Manager, representative from donor, partners and project team.	Two project coordination meetings every year. One of these meetings should coincide with the Annual Project Review.
Preparation of inception report, detailed action and work plan.	UNIDO Project Manager (PM) and project team.	Within first 6 months of project start up.
Regular monitoring and analysis of performance indicators	UNIDO Project Manager (PM) and project team.	Regularly to feed into project management and Annual Project Review.
Annual Project Review to assess Project progress and performance	UNIDO Project Manager, donor, Partners and project team.	Definition of annual work plans.
Visits to field sites	UNIDO Project Manager, representative from donor, partners and project team.	Annually or when critically required.
Terminal Project Evaluation	PM, UNIDO HQ, Project Steering Committee and project team.	Evaluation at least one month before the end of the project; report at the end of project implementation.

Table 10: Monitoring and evaluation of the project

Team composition:

- **Project Manager:** Mr. Zhao Jie, Coordinator of South-South and Triangular Industrial Cooperation
- **Lead Expert:** Mr. Eneyew Abera Gebremefas
- **Team Members:** Renata Ridlovschi; Hao Ding; Sebastian Schrottenbach and Ming Zhang

The proposed work plan from project inception – July 2020 to June 2021 is outlined in Table 11.

PROJECT ACTIVITY	July to December 2020						January to June 2021					
	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
PROJECT MANAGEMENT ACTIVITIES												
Project inception/baseline studies	■	■										
Project launching	■		■									
Establish project management team		■	■									
First project coordination meeting					■							
Produce project progress report						■						■
Produce project progress report						■						
PROJECT IMPLEMENTATION ACTIVITIES												
Identify and initiate with project partners	■	■										
Identify cooperation area with partners		■	■									
Prepare capacity support plan with partners			■	■								
Conduct capacity need assessment survey	■	■										
Prepare technical specification for knowledge hub	■	■										
Prepare TOR to select vendor	■											
Select vendor and sign contract with developer	■											
Prepare requirement analysis of the knowledge hub			■	■								
Finalize the first draft of the knowledge hub					■							
Launch the final knowledge hub						■						
Phase 2 of the knowledge hub							■	■	■			
Prepare training plan for industrial parks officials		■	■									
Prepare training material for industrial parks					■	■	■					
Identify participants and provide online training									■	■	■	
Organize international industrial parks conference								■	■			
Organize industrial parks study tours									■	■		
Prepare industrial parks risk management plan									■	■	■	
Produce communication materials	■	■	■	■	■	■	■	■	■	■	■	■
Agro-park guidelines preparation	■	■	■	■	■	■	■	■	■	■	■	■

Table 11: Proposed work plan from July 2020 to June 2021

DETAILED WORK PLANS AND DELIVERABLES





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