Final Report for IDRC Project #520 860

Planning and Process – A Contribution to IDRC’s Investment Climate and Business Environment Research Fund

For the attention of

David Schwartz, Jo-Ann St-Louis and Hélène St-Martin
International Development Research Centre

Submitted by:

Kevin McKague & David Wheeler
York University and Dalhousie University
Canada

September 25, 2006
Dear David, Hélène and Jo-Ann,

We are delighted to submit this final technical and financial report for the project “Planning and Processes - A Contribution to IDRC's Investment Climate and Business Environment Research Fund.”

As you know, since the early work in designing the Investment Climate and Business Environment (ICBE) Research Fund described in this report, the Fund has gone on to a successful launch, a first round of calls for proposals in Africa and Canada, and a very well received Jury Meeting and Workshop for potential grant applicants. We are very pleased to be partners with IDRC in this work.

This project would not have been possible without the vision of Alain Berranger and David Schwartz and their colleagues in the Private Sector Development Task Force at IDRC. We thank them for their entrepreneurial spirit, their courage to experiment with new approaches and their passion and commitment to work to see this project through to implementation.

We look forward to continued opportunities to work with IDRC on innovative projects in the future.

Kind regards,

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Project Financial Report

The official Project Financial Report was prepared by Sophia Mitchell Hutson in York University’s Research Accounting Finance Department.

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The Financial Report was signed by David Wheeler, project leader, and Angela Zeno, Manager, Research Accounting, for York University and is submitted as a separate PDF document to the current report.

Note that this grant was not conditional on additional funds from other donors. However, it should be mentioned that in-kind contributions of 25 days of David Wheeler’s time were made towards the project, for a matching contribution of 25 x $2,000/day = $50,000.
Project Technical and Progress Report

Background

Kevin McKague and David Wheeler have been collaborating with IDRC’s Private Sector Development Task Force since late 2003. This collaboration has included the commissioning of a Scan of Research and Current Activities Relating to the Private Sector and Development (2004) and the successful Unleashing Entrepreneurship conference held in Ottawa in April 2005. IDRC’s work in Private Sector Development was also cited in a major paper by David, Kevin et al in the MIT/Sloan Management Review (fall 2005).

This project and the idea to create an Investment Climate and Business Environment (ICBE) emerged from the proceedings of the Unleashing Entrepreneurship Conference in parallel with other consultations and work by IDRC’s Private Sector Development Task Force.

This project was designed to carry forward the initial work of IDRC and the insights gathered from Unleashing Entrepreneurship. As described in the Grant Agreement, the overall objectives of this project were as follows:

The overall objective of the research support Project is to collaborate with IDRC’s Private Sector Development Task Force on the design and planning of the Investment Climate and Business Environment Research Fund. The key issues will include optimal arrangements for administration of funds, peer review processes for proposals, research topics, expectations and accountabilities for academics receiving funds.
Deliverables

The grant agreement lists 4 objectives for this project, described below:

It is proposed that York University assists IDRC in a number of areas pertinent to the launch and effective execution of the ICBE research programme. These areas are:

1. Ongoing advice in identifying reliable partners in Canada, Africa, and potentially elsewhere who have a commitment to one or more of the identified research themes
2. Ongoing networking through visits sponsored directly by IDRC or other collaborators
3. Co-design of institutional mechanisms for capacity building and ‘twinning’ of Canadian and African (or other) research institutions
4. Co-design of institutional and administrative mechanisms for research proposal receipt and funding, including peer review and other oversight

In addition to this, our original proposal to IDRC lists the following 8 deliverables:

5. Research and comparative knowledge on best practices for competitive small grant research mechanisms, relaying mostly on IDRC extended experience.
6. Design of approved peer review and grant-making strategy in the light of findings and recommendations of the deliverable above, and discussions with collaborators and potential grantees in the field.
7. Co-design of an ICBE knowledge-sharing system – for example, a research and learning ‘webbank’ to include cases relevant to researching and teaching sustainable enterprise and PSD
8. Ongoing oversight and annual reporting on participation in the steering committee in collaboration with IDRC and others.
9. Identification of Canadian and African academics and other experts to undertake ICBE research methods workshops in Africa.
10. Preliminary design of a databank of cases and teaching materials relevant to teaching enterprise and PSD
11. Dissemination and promotion of a preliminary design of a course in International Business and Private Sector Development being developed at the Schulich School of Business (linked to 4).
12. Organization and delivery of Nairobi stakeholders’ meeting to discuss optimal arrangements for administration of funds, peer review processes for proposals, research topics, expectations and accountabilities for academics receiving funds etc.

Some of these deliverables overlap or are closely interrelated. This report will provide information on the progress of all of the deliverables above.
Identifying Partners in Canada and Africa
(Deliverable #1)

Throughout this process, David Wheeler and Kevin McKague made available their contacts in the Canadian and international academic and PSD research community as well as the African business school community for the benefit of this project.

Ultimately, the ICBE Research Fund was co-funded by TrustAfrica www.trustafrica.org, with each organization contributing $1.6 million CDN. TrustAfrica also became an implementing partner in the administration of the Fund, with assistance by the Foundation for Sustainable Enterprise and Development.

Through many days of research and networking, a list of contacts and partners for this project was created and is included in the excel spreadsheet entitled “ICBE RF Contact List” that accompanies this report (see the ‘Master List’ tab as well as the ‘Canadian’ tab).

Ongoing Networking through Visits
(Deliverable #2)

The design and research themes of the ICBE Research Fund was shaped through a number of stakeholder meetings in Africa (in addition to the Nairobi stakeholder meeting described under deliverable #12). These included David Wheeler’s meeting with Erasmus Kaijage, the dean of the University of Dar es Salaam’s Faculty of Commerce and Management in December 2004 and the dean of Makerere University Business School, Waswa Balunyawa, in July 2005.

Design of the Investment Climate and Business Environment Research Fund
(Deliverables # 3, 4 and 6)

The main deliverable for this project was the co-design of the ICBE Research Fund itself. This has included institutional and administrative mechanisms for research proposal receipt and funding, the peer review and adjudication process, governance arrangements, and grants to support the ‘twinning’ and capacity building partnerships between Canadian and African research institutions.

The report “The Investment Climate and Business Environment Research Facility: Project Design” which proposed the structure, functioning and governance of the ICBE RF is included as an appendix of this report. The original Project Design report was submitted to IDRC (Alain Berranger and David Schwartz) on January 26, 2006. The copy included in the appendix has been slightly abridged.
Lessons from Other Competitive Small Grant Research Programs  
(Deliverable #5)

As background for the preparation of the ICBE RF Project Design, research on best practices for competitive small grant research mechanisms was conducted. The following similar small grant programs were researched to surface lessons learned and best practices that could inform the design of the ICBE Research Fund.

SHHRC’s Research Development Initiatives (RDI) Program
The overall objective of the RDI program is to support research in its initial stages by supporting the development of new ways of analyzing, integrating and transferring knowledge in the humanities and the social sciences. This program has many similarities to the ICBE RF in that it actively seeks to build research communities around new and emerging fields of research.

Lessons from the World Bank’s experience with competitive grants in African Agricultural research
In Kenya, a competitive agricultural research fund has existed for almost ten years with support from the World Bank, USAID, the United Kingdom, The Netherlands and Scandinavian countries. After the good results convinced various stakeholders, the Kenya Agricultural Research Institute (KARI) expanded the scope of the fund and is successfully raising more funding for the scheme. In Tanzania, the Department of Research and Training (DRT) has several years of experience with a national agricultural research fund, supported by the Government of Tanzania, the African Development Bank and the World Bank with funding from Sweden, Ireland, and the United Kingdom.

IDRC Grants Programs
The IDRC has considerable experience in competitive grants programs. For this project a number of sources of information were consulted.

- Conversations with Jean Woo, Research officer for IDRC’s Research on Knowledge Systems (RoKS) Annual Research Competition and related documentation.
- Martín Mujica’s report “Assessing the Contribution of Small Grants Programs to Natural Resource Management” which was a final report by to IDRC’s Minga Program Initiative.
- Information on three IDRC research and post-doctoral awards programs: The Awards for Doctoral Field Work; Pan Asia ICT R&D Program, and the Post-Doctoral Awards in Urban Agriculture Program.

Other Competitive Research Grants Programs (and Related Initiatives)
Other programs researched included the Shell Foundation East Africa Fund, the Canadian Investment Fund for Africa, and the UNESCO Small Grants Program.
Database of Cases and Resources for Teaching and Researching PSD
(Deliverables # 7 and 10)

A database web designer was contracted to create a customized on-line learning database for professors and researchers from Africa and around the world. This database includes up to date teaching materials (articles, videos, reports, etc.) as well as case studies. To view the materials and case studies go to www.sustainableenterprisefoundation.org/modules.

Steering Committee Participation
(Deliverable # 8)

David Wheeler and Kevin McKague participated in steering committee meetings (usually conference calls) as well as several one-on-one meetings with IDRC project representatives (David Schwartz and Alain Berranger).

Identification of Workshop Participants
(Deliverable # 9)

As part of the early preparations for the Research Methods and Grant Proposal Writing Workshop that was held in Dar es Salaam, Tanzania, we compiled a list of candidates to attend the workshop. The finalized list is included in the Excel spreadsheet that is being submitted with this report (see the Master List tab as well as the Workshop tab).

New PSD Course at the Schulich School of Business
(Deliverable # 11)

This project included active support for the design and initial delivery (January to April 2006) of a new course at the Schulich School of Business on the role of the private sector in international development. The course is entitled Sustainable Value Creation and is taught by Oana Branzei with significant support from Kevin McKague. The PDF syllabus for this course is forwarded electronically along with this report and accompanying excel spreadsheet.

Nairobi Stakeholders Meeting
(Deliverable # 12)

One of the first activities of the project was the organization and facilitation of a meeting of business school deans and other key stakeholders in Nairobi in September 2005, to gather further input on the coalescing idea of creating an Investment Climate and Business Environment Research Fund. The research questions and thematic clusters
from IDRC’s *Unleashing Entrepreneurship* conference were presented to the group by David Wheeler and David Schwartz. After review and discussion, each workshop participant was asked to rank the two most important clusters. Two areas emerged as clear priorities – the enablement theme and the human capital theme. This information and other discussions at the stakeholder meeting were taken into account in the overall design of the Research Fund. A more detailed description of the stakeholder meeting is available on David Schwartz’s [PSD blog](#) from this visit.

**Conclusion**

This project has gone on to be implemented. The first Call for Proposals were issued in June and the first meeting of the ICBE RF Jury was held in July. In addition, over 40 researchers from across Africa participated in a Research Methods and Grant Proposal Writing Workshop in Dar es Salaam, Tanzania. At the time of writing this report, Trust Africa has hired staff to take over the running of the Secretariat of the Research Fund. It is anticipated that there will be many applications for the grants available and that future efforts will seek to raise funds to carry the project forward beyond its current 3 year life span.

For further information on the continued progress of the ICBE RF, see the Progress and Financial Reports from Trust Africa and the Foundation for Sustainable Enterprise and Development.
Appendix: The Investment Climate and Business Environment Research Facility: Project Design

Originally submitted by Kevin McKague and David Wheeler, January 26, 2006

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Introduction and Overview

The Investment Climate and Business Environment (ICBE) Research Facility will use competitive research grant mechanisms, training workshops, and capacity-building partnerships between business schools to build the capacity of the African private sector development (PSD) research community and contribute to an improvement in the investment climate and business enabling environment for sustainable enterprise in Africa.

Small, intermediate and large grants will be made in the range of CDN $10,000 - $100,000. The grants will be awarded following an open, competitive process involving Peer Reviews and the final deliberations of a pan-African Jury. Grants will be disbursed in two rounds over 2006-2008. Proposals will be judged on merit using African experts and scholars as adjudicators. The Facility anticipates that African universities, business schools, individual professors, graduate students, African investment and SME promotion agencies, African SME policy think tanks, private sector entities or similar organizations could come forward with interesting and leading-edge research proposals. The Facility will operate in English and French and will cover all regions of the African continent.

There will be an emphasis on research that directly involves the private sector, research on practical firm issues and research that takes the perspective of the private sector enterprise. Research will be especially welcome where it examines PSD in Africa that is both ‘sustainable’ and local, i.e. contributing to long term economic development and livelihood creation that does not erode social, human or ecological capital, but rather enhances these assets.

Research Themes

1. Entrepreneurship and human capital development.
2. Public-private partnerships and dialogue.
3. Regulation and reform (i.e. structural changes in the business enabling environment) including but not limited to the following aspects:
   a. financial systems,
   b. market access,
   c. customs systems,
   d. tax systems,
   e. ports and transportation systems,
   f. adjudication and transfer of property, and
   g. conflict resolution and transparency in government and in private transactions and operations.
4. Business and community linkages associated with foreign and domestic investments, including local, municipal, regional, national and sub-regional supply chains, supply chain processes and SMEs.

1 All currency cited in this document is given in Canadian dollars.
Objectives

The objectives of the ICBE Research Facility are:

**General Objectives:**
- To generate knowledge:
  - which will create a better understanding of, and
  - which will inform policy change towards
    an improvement in the investment climate and business environment for
    sustainable enterprise in Africa.
- To strengthen the research capacity of the emerging cadre of PSD researchers in
  Africa and their associated institutions.
- To contribute to finding solutions to practical problems encountered on the
  ground by the private sector in investing in and operating businesses in Africa.

**Specific Objectives:**
- To promote PSD research in Africa, through grants of three different sizes and
  intents, aimed at attracting the interest of business schools students and
  scholars, investment and SME promotion agencies, think-tanks, and other
  research institutions, and with mechanisms to build capacity for research and
  for policy influence.
- To increase the density of networks and relationships among the African PSD
  research community and PSD experts in general.
- To involve African experts in the peer review and selection of research
  proposals.
- To strengthen the linkages between Canadian and African PSD researchers,
  fostering learning in both geographies and contributing to capacity building
  for PSD research in Africa.
- To train people at key research positions in African institutions on aspects of
  business-research methodology and proposal writing.
- To generate business case studies and papers that can be used as teaching
  tools at management schools, enriching the curricula.
- To generate stories and cases that can be disseminated to journalists and
  others to enhance the image of Africa as a good place for doing business.
**Overall Facility Parameters**

The Facility will consist of CAD $3.2 million ($1.6 million from IDRC and $1.6 million from TrustAfrica). A number of grant programs will be run from approximately 2006-2008 in two major disbursement phases. The grant programs will be focused on African researchers. The Facility also includes capacity building components related to building the African PSD research community. Both the grant programs and the capacity building programs are described below.

**Grants**

The ICBE RF’s grant program is expected to consist of three main components – small grants, intermediate grants and large grants as described below.

**Small Grant Program**

Forty-seven small grants of up to $10,000 each will be available and spread over the two funding rounds. Typically these grants will support the following activities in line with the ICBE RF research themes:

- writing of case studies
- hiring Masters and PhD students as research assistants
- funding the research of Masters and PhD students (through their institutions)
- presenting papers at regional or international conferences
- implementing research findings

**Adjudication Process**

The process of adjudicating the small grants will need to strike a balance between efficiency (i.e. not placing an undue workload on the Jury) and legitimacy (i.e. ensuring that the process appears free of any conflicts of interest). In addition, since the volume of applications will be hard to predict (possibly 100-400+) some flexibility in finalizing the adjudication process will be essential. Currently, it is proposed that Small Grants be adjudicated by a special committee of the Jury (the ‘Small Grants Committee’) which will comprise approximately 3-4 members of the Jury. The Secretariat may also make use of additional external reviewers as necessary. The Project Coordinator based at the Secretariat will screen all small grant applicants to ensure that they meet minimum eligibility requirements. The Small Grants Committee will then meet (likely at the same time as regular Jury meetings) to make final decisions.

**Selection Criteria**

The small grants can be adjudicated based on the following guideline:

- 50% Anticipated contribution of the proposal to build the capacity of the African PSD research community
- 50% Significance of outputs proposed (ie. research, venture plan, case study, article, conference presentation, etc.) and its contribution to improving the investment climate and business enabling environment in Africa

**Intermediate Grant Program**

Twenty-four intermediate grants of up to $50,000 will be available over the course of the two rounds of funding. These grants will be peer reviewed and awarded to research...
proposals that are aligned with the themes and objectives of the Facility and which achieve high scores from the Jury according to the adjudication criteria.

**Adjudication Process**
The intermediate grants will be reviewed by a maximum of 3 peer reviewers who will give comments. The proposals will then be adjudicated by the Jury (for more information on these processes, see the sections on Peer Reviewers and Jury members).

**Selection Criteria**
The intermediate grants can be adjudicated based on the following criteria:

45% Significance of the proposed research and likelihood of the proposed research activities to meet the ICBE RF’s objectives and expected outcomes

20% Applicant’s qualifications for carrying out the proposed research

20% Quality of the plans for the proposed research (methodology)

15% Partners and relationship to policy process

Large Grant Program
In the second round of the project (2007), approximately five large grants of up to $100,000 will be awarded. These grants are likely to involve collaborators in more than one country, will be peer reviewed, and will be awarded to research proposals that are aligned with the themes and objectives of the Fund, and which achieve high scores from the Jury.

**Adjudication Process**
The grants will be reviewed by a maximum of 3 peer reviewers and adjudicated by the Jury.

**Selection Criteria**
40% Significance of the proposed research and likelihood of the proposed research activities to meet the ICBE RF’s objectives and expected outcomes

15% Applicant’s qualifications for carrying out the proposed research

15% Quality of the plans for the proposed research (methodology)

15% Partners of the proposal (ie: public policy actors, private sector actors, others)

15% Policy process in which the proposal is immersed

**Call for Proposals**
For a sample call for proposals for the grants programs, see Appendix A.
Capacity Building Components

In addition to the grants described above, the ICBE Research Facility will include two additional components designed to build the capacity of the African PSD Research community. These components are:

- Training Workshops for Building the African PSD Research Community
- The Canadian-African Business School Partnerships

Role of the Foundation for Sustainable Enterprise and Development in Overseeing the Capacity Building Components

IDRC has developed a relationship with David Wheeler and Kevin McKague and, through them, with the Foundation for Sustainable Enterprise and Development (as well as York University’s Institute for Research and Innovation on Sustainability (IRIS) and the Schulich School of Business). Collaboration between David and Kevin and the Private Sector Development Task Force at IDRC have included joint efforts in the preparation of the “Unleashing Entrepreneurship: Mobilizing Human, Financial and Social Capital” Conference in Ottawa on April 6-8 2005 and a preparatory scan of research and activities in the area of the private sector and development. This relationship is continuing through assistance to IDRC in various aspects of the preparation of the ICBE RF.

The ICBE RF Secretariat at TrustAfrica in Dakar will become operational in approximately June-July 2006. In the mean time, for this project to continue its momentum until the Secretariat is fully in place, IDRC has asked David Wheeler and Kevin McKague through the Foundation for Sustainable Enterprise and Development to oversee the training workshops and the Canadian business school partnership grants. Together with the Steering Committee, David and Kevin will also contribute to building the relationships with the African PSD Research community (including potential jury members and peer reviewers) until the Secretariat is fully up and running.

Because David and Kevin are associated with York University, applicants from York will not be eligible to apply for grants from the ICBE Research Facility.
Canadian-African Business School Partnerships

An important capacity-building component of the Facility is the awarding of 5 grants of up to $50,000 to Canadian business schools for proposals to strengthen or establish PSD research capacity-building partnerships with African business schools or related institutions.²

It is envisaged that Canadian business schools (or other university faculties or public, private or non-governmental organizations with an interest in PSD) will apply for grant funding to undertake joint research projects or provide mentoring and training to African PSD researchers. However, it is also recognized that Canadian partners may wish to apply for funding to build a relationship that is only in its earliest stages of development. Efforts will be made to ensure smooth collaboration with existing global business school support organizations such as the IFC’s Global Business School Network. Proposals may include one or more Canadian partners and one or more African partners.

Illustrative Capacity Building Activities
Activities illustrative of these mutual beneficial capacity building partnerships include:
- Joint research projects relating to the themes of the ICBE RF
- Case study research and writing
- Student and faculty exchanges
- Business plan and new venture development
- Joint organization of conferences, seminars and workshops

Administrative Process
A competitive call for proposals to selected Canadian business schools will be issued (see sample, Appendix B). The call for proposals will use a targeted approach to those Canadian Business Schools with the most intensive international cooperation programs in Africa (again, see Appendix B).

Selection Process
Proposals will be adjudicated by a committee nominated by David Wheeler and Kevin McKague and approved by IDRC and TrustAfrica and will likely include people such as Professor Sanjay Sharma (WLU), Carolyn Egri (SFU), Marie-France Turcotte (UQAM), Alain Berranger, and Hany Assad (IFC).

Selection Criteria
Proposals will be judged on their potential to build the capacity of the African PSD research community, and to build long-lasting links among the proponent Canadian and African institutions.

² Although the language in this section refers to partnerships between business schools, this could also include partnerships between similar organizations engaged in conducting investment climate and business environment research such as other university faculties (ie. economics, etc.), African investment promotion agencies, African SME policy think tanks, private sector entities, etc.
Training Workshops for Building the African PSD Research Community

The Facility Executive Committee will appoint The Foundation for Sustainable Enterprise and Development (David Wheeler and Kevin McKague) to oversee the training element of the ICBE RF in partnership with the Secretariat. This training has three components:

- Team building amongst the Jury, Peer Reviewers and Secretariat including building a shared view of the objectives of the ICBE RF, developing a shared understanding of the adjudication process and criteria, and establishing the principles, norms, roles, functions and inter-group dynamics necessary for effectively carrying out the objectives of the Facility.

- Training potential grant applicants in research methods and proposal writing in order to ensure the highest quality grant proposal submissions.

- Training of grantees in research methodology, promoting alignment between the research projects, and promoting exchange and feedback among grantees.

For maximum efficiency and effectiveness, the first two training components can be delivered in a one-week period where the first day would be team building for the Peer Reviewers, Jury and Secretariat and the next four days would focus on training in research methods and proposal writing, as illustrated below:

Day 1: Team building and training for jury members and peer reviewers
Day 2: Research design
Day 3: Quantitative research methods
Day 4: Qualitative research methods
Day 5: Proposal writing

A number of the ‘insiders’ (i.e. Peer Reviewers and Jury members) participating in the team building on Day 1 may also wish to participate in the research methods and proposal writing workshop throughout the rest of the week.

It is estimated that approximately 30 people would attend the team building on Day 1 (10 Jury members + 17 peer reviewers + 2 Secretariat staff and 1-2 steering committee members) and that 40 participants would attend the research methods and proposal writing training (perhaps 20 senior university research representatives + 16 of the peer reviewers and jury members and 4 Secretariat /Steering Committee representatives).

The third component would take place among selected grantees, in the second year of the project. It is estimated that approximately 30 people would attend (25 grantees + Secretariat and facilitators), split in two groups if required for language needs.
**Trainer Qualifications**
The Foundation for Sustainable Enterprise and Development will contract this training to an implementing academic or academics with the following qualifications:

- significant experience in peer review and adjudication processes
- experience in training for research proposal writing
- experience in team building
- experience in similar training and capacity building exercises in developing countries

The implementing academic(s) will be responsible for designing and delivering the workshops and preparing course materials for participants in English and French.

**Timing**
We envision that this combined training will be delivered once over the course of 5 days during July, 2006. This timing would coincide with the beginning of full operations by the Secretariat at a time when the Jury members and Peer Reviewers would have been newly selected.

**Location**
Given that the Secretariat will be located in West Africa, we propose that for reasons of geographic inclusion and balance, that the training workshop be delivered in East Africa with a candidate institution being the University of Dar es Salaam.

**Language**
The workshop will be delivered simultaneously in English and French, with materials provided in both languages.
Project Rationale

The UN Commission on the Private Sector and Development, NEPAD and the G8 Commission for Africa have all recognized the need for sustainable and equitable private sector development to contribute to a positive future for Africa. Sustainable private sector development and economic growth are essential if Africa is to achieve the Millennium Development Goal of halving the proportion of people in absolute poverty by 2015.

Investment and unleashing entrepreneurship are essential to enabling this growth and associated job creation and improved services. They in turn are dependent on the continual improvement of the investment climate, the business enabling environment, and the capacity of entrepreneurs, business leaders, policy makers, and researchers.

In this context the IDRC struck a Private Sector Development Task Force in 2004 to chart a course for future IDRC programming in this area. An initial scan of international research and activity relating to The Private Sector and Development was commissioned and was soon followed by IDRC’s Unleashing Entrepreneurship Conference in Ottawa, April 6-8, 2005. The conference participants, representing PSD experts from 28 countries, identified key research themes and questions to shape a relevant and timely PSD research agenda. The idea of an Investment Climate and Business Enabling Environment Research Facility began to take shape as a high leverage intervention that could be catalyzed by IDRC and its partners.

This idea was further shaped through numerous stakeholder meetings in Africa including:

- Alain Berranger’s visit to West Africa in February and March, 2005
- The meeting of Business School deans and other stakeholders in Nairobi in September 2005 facilitated by David Wheeler and David Schwartz which also included representation from the IFC’s Global Business School Network
- David Schwartz’s visits to stakeholders in South and East Africa in September 2005
- David Wheeler’s meeting with the deans of the UDSM Faculty of Commerce and Management (Dec. 2004) and Makerere University Business School (July 2005)
- Meetings in November 2005 by Alain Berranger and Carmen Roca with Hugh Scott (DFID, Pretoria); Rashad Cassim, the Dean of the Wits School of Economics and Business Sciences; and Chris Darroll and Stephan Malherbe, respectively Managing Partners of SBP and Genesis Analytics, two leading South African consultancies on investment climate, business environment and regulation

Further input into the project emerged from discussions with the design principals at TrustAfrica, the Investment Climate Facility and York University as well as internal discussions within IDRC. With aligned interests and objectives, TrustAfrica came forward to contribute 1.6 million to the ICBE RF in October and was confirmed as the Secretariat of the Facility in November, 2005.
Gender Considerations and Analysis

IDRC and the project Steering Committee members recognize the importance of gender considerations for this project. Gender considerations will be integrated into the project design and operation in the following ways:

- Appointments to the Steering Committee, Jury and group of Peer Reviewers will take into consideration gender representation and balance

- The training workshops for building the African PSD research community will take gender considerations into account in the selection of the workshop facilitators and the content of the training sessions

- The Jury will consider how gender issues and the roles of women in business are addressed in the research proposals as a component of their evaluation criteria
Governance Structure

The diagram below illustrates the governance structure of the ICBE Research Facility and the interrelationships of the key stakeholder groups.

The next sections below outline the role and functioning of the Executive Committee, the Jury, the Peer Reviewers and the Secretariat. This is followed by information on other project details such as timeline and budget.
Executive Committee

Committee Composition
The Executive Committee will be comprised of four members:

- A representative of IDRC
- A representative of TrustAfrica
- The ICBE RF Project Coordinator
- David Wheeler (ex-officio)

Committee Chair
The Executive Committee will be chaired by a representative of, or appointee from, the IDRC. The committee chair is responsible for ensuring that the work of the Facility is carried out with fairness, thoroughness and integrity.

Responsibilities of Committee Members
Executive Committee members will be responsible for:

- Overall design and structuring of the Facility, including:
  - Final identification of research themes and approaches to the themes (research terms of reference / entry points)
  - Overseeing timely management of the Facility and its activities
  - Selecting the members of the Jury for the African research competitions
  - Providing direction in liaising with other important actors in Africa and with other donors

- The Executive Committee and the Project Coordinator will share responsibility for strategic partnering and for further resource mobilization for this project.

- At the project’s completion, the Executive Committee will engage an independent and reputable third party to conduct a final review of the project with funds earmarked in the Secretariat’s budget.
Secretariat

The Secretariat will be housed at TrustAfrica in Dakar and will be staffed by two full-time bilingual (English-French) individuals: the Project Coordinator and the Project Assistant. These two staff members will be hired by TrustAfrica for a period of 2½ years.

Secretariat Responsibilities
The Secretariat as the administering organization will be responsible for:

- Issuing calls for proposals for the various grants programs
- Responding to questions from potential applicants
- Receiving grant proposals
- Processing grant applications and enquiries in French and English
- Nominating and recruiting Peer Reviewers and Jury members
- Coordinating the peer review of grant proposals
- Screening and determining that all proposals that go to peer review and Jury meetings have met the eligibility requirements
- Arranging Jury meetings / teleconferences
- Acting as secretary at the Jury meetings to record final scorings and comments on each proposal, keep track of budget recommendations and funding commitments, taking minutes of the meeting, etc.
- Providing comments and feedback from adjudicators to applicants
- Disbursing money to successful applicants for the small, intermediate and large grants
- Creating and maintaining a bilingual project web site
- Managing and monitoring the project budget
- Providing sufficient administrative support to ensure responsibilities are carried out
- Responding to all queries and complaints pertaining to the decisions of the Adjudication Committee
- Keeping track of feedback from various stakeholders for continual improvement and also for final program evaluation

Project Coordinator Job Description
Candidates for the position of Project Coordinator must have the following skills and competencies:
- Academic background and knowledge of academia and business schools in Africa
- Research experience
- Experience in the private sector (in a broad sense)
Jury

Nominations and Selection Criteria
The Executive Committee will receive nominations for the Jury from the Secretariat and other stakeholders (see Appendix C for draft call for nominations for Peer Reviewers and Jury members and Appendix D for names of potential candidates identified to date). The Executive Committee will then appoint the Jury. The prime consideration for selecting Jury members is to ensure:

- the overall competence and credibility of the Jury
- appropriate representation by geography, gender, and expertise
- an appropriate knowledge of English and French

Jury members will be expected to serve for the initial 2 rounds of grant-making or approximately 2.5 years.

Composition
The Jury will be composed of approximately 10 individuals. The Jury will include a ‘Small Grants Committee’ that will be responsible for adjudicating approximately 50 small grants per funding round.

Possible Jury composition could be as follows:
- 3 from West Africa
- 3 from East/South Africa
- 2 from North Africa
- 1 from ICF
- 1 from NEPAD
- 1 from IFC (possibly Bernard Chidzero, General Manager, APDF)

The 8 jury members from North, South, East and West Africa could include: 5 from the academic world (i.e. business schools, management, etc.), 2 from the public policy sphere, and 1 from the private sector.

Jury Chair Selection Process
The Jury will elect a Chair from amongst the members of the Jury.

Responsibilities of the Jury Chair
The Jury chair is responsible for ensuring that the work of the Jury is carried out with fairness, thoroughness and integrity. He or she is also responsible for efficiently managing the committee's time so that each application is adequately discussed.

The committee chair has a vital role in ensuring that the Facility’s procedures are observed and that potential or actual conflict of interest situations involving committee members are avoided. The chair works closely with the secretariat and seeks guidance, as appropriate, before and during the adjudication process.

The Jury chair:
• guides the discussion of each application before the Jury
• ensures that the Jury’s final recommendations accurately reflect the majority view or consensus of the committee
• summarizes the views and arguments expressed by members in order to provide the applicant with a rationale for the committee’s decision (recorded by the Secretariat)

**Responsibilities of Jury Members (for Intermediate and Large Grants)**

Jury members are responsible for evaluating the relative merits of each application submitted to them for review, including the input of peer reviewers where available, on the basis of the adjudication criteria. Committee members will not be asked to review proposals which pose a conflict of interest.

It is important that individual committee members review those applications where their expertise will assist the Jury in making its recommendations.

In advance of the face-to-face meetings of the Jury, Jury members receive copies of all of the proposals by courier from the Secretariat. Each Jury member will be assigned as a Reader A or Reader B to approximately 20% of the proposals. The Jury member will review the proposals they have been assigned to in detail, including the comments of Peer Reviewers. e-mail or fax their preliminary scores to the Secretariat on a specified date before the face-to-face adjudication meeting is held.

Jury members are asked to share their preliminary scores and comments with the rest of the Jury (logistics provided by the Secretariat) before the meeting to serve as guides for discussion during the meeting. During the meeting, the Reader A assigned to a proposal will present to the committee a brief summary and evaluation of the proposal and a brief analysis of the budget requested. Reader B will provide additional comments and analysis only if they differ substantially from those of Reader A.

Jury members discuss each application until consensus is reached. Then the Jury decides the final scores and makes its funding recommendations. The Secretariat records these details as well as feedback for the applicants. After assigning final scores to all applications, the Jury draws up a rank-ordered list of the applications and will forward this to the Secretariat for grant disbursement subject to budget constraints.

**Responsibilities of Committee Members (for Small Grants)**

For Small Grants, the Secretariat will review proposals to determine eligibility. They will then be forwarded to the “Small Grants Committee” for final adjudication.

**Honorarium**

In lieu of an Honorarium, the Jury members will benefit professionally from the team building workshop in East Africa and attending the face-to-face Jury meetings where international per-diems will be paid to cover expenses.
Peer Reviewers

Each intermediate or large grant proposal will be reviewed by up to three peer reviewers (assuming successful recruitment and training).

**Rationale**
- Peer Reviewers give the ICBE RF increased legitimacy amongst the African PSD research community
- Peer Reviewers ensure maximum appearance of impartiality
- Peer Reviewers contribute valuable comments for the consideration of Jury members

**Selection Process and Criteria**
Peer reviewers will be nominated by their academic institution or research organization or by the Steering Committee and categorized according to their research expertise.

Peer reviewers may be invited to attend the training in Research Methods, Proposal Writing and Peer Reviewing in mid-2006.

Peer Reviewers will be chosen based on their overall competence and expertise and to reflect appropriate representation on the basis of region, language and gender.

**Responsibilities**
Peer Reviewers will be responsible for:

- Reviewing proposals in confidence and submitting qualitative comments

**Peer Reviewer Expenses**
The Facility will cover the costs of Peer Reviewers for long-distance telephone charges and couriering.
Monitoring and Evaluation

The Secretariat will be responsible for ongoing monitoring of ICBE RF grant recipients and for collecting final reports from all grantees.

Evaluation of the ICBE RF Project will occur at a time after the two rounds of funding have been completed. Evaluation may occur on or around the time of the major conference to share research findings and further create networking and capacity building opportunities for the African PSD research community. The evaluation will be carried out by a neutral third party, overseen by the Steering Committee and paid for from the Secretariat’s budget.

Dissemination Strategy and Major Conference
During early 2006, the Steering Committee (through IDRC) will reconnect with stakeholders that have been consulted to date (Nairobi meeting participants, etc.) to provide an update on the Research Facility. A pre-announcement of the call for proposals will be issued as well to potential proponents.

Applicants to the Intermediate and Large Grant programs will be required to include plans for dissemination of their research in their proposals, and this will be considered by the Adjudication Committee.

In addition, a major opportunity exists for the IDRC and other partners to participate in a major conference on Sustainable Enterprise in Africa that would include significant opportunities to share and disseminate the results of the research (for further details and a conference concept note see Appendix F). This conference could be considered the follow up and successor to the IDRC’s Unleashing Entrepreneurship conference in April 2005.
### Timeline

<table>
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<tr>
<th>Month</th>
<th>Event Description</th>
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| November  | **Identification of Secretariat**  
Ongoing project design                                                                                                                                  |
| December  | **Finalization of Project Design**  
Completion of ICBE RF project design  
Creation of Executive Committee / Steering Committee                                                                                                    |
| 2006      | **Foundation**: Contact Canadian Business Schools                                                                                                                                               |
| January   | **Foundation**: Send out request for Jury Members and Peer Reviewers                                                                                                                             |
| February  | **Call for Proposals for Canadian Business School partnerships and pre-announcement of Call for proposals in Africa.**                                                                          |
| April     | **Jury Selected by the Executive Committee**                                                                                                                                                 |
| June      | **TrustAfrica Commences Operation of Secretariat**                                                                                                                                            |
| June-July | **Project Coordinator Hired**  
Training for Jury members, peer reviewers and other stakeholders.                                                                                                                        |
| July      | **Call for Proposals** (1st round)                                                                                                                                                              |
| December  | **Deadline for Proposal Submission**                                                                                                                                                            |
| January   | **Jury Meeting** (face to face)                                                                                                                                                                |
| February  | **Winners Announced**, Grants Disbursed                                                                                                                                                         |
| September | **Call for Proposals** (2nd round)                                                                                                                                                              |
| December  | **Deadline for Proposal Submission**                                                                                                                                                            |
| 2007      | **Jury Meeting** (face to face)                                                                                                                                                                |
| January   | **Winners Announced**  
Grants Disbursed                                                                                                                                                                                    |
| October   | **Major Conference** highlighting results of research and latest thinking on PSD issues in Africa                                                                                              |
| November  | **Evaluation and Assessment**  
Review and assessment of outputs and outcomes of the ICBE RF to date                                                                                                                               |
Appendix A: Sample Call for Research Proposals

Call for Research Proposals

The International Development Research Centre and TrustAfrica/Ford Foundation is pleased to announce the establishment of an Investment Climate and Business Environment Research Facility which will make available up to US$2.8 million for researchers in private sector development based in African Universities, business schools and independent research institutions.

The ICBE Research Fund will invite research proposals in the following thematic areas:

1. Entrepreneurship and human capital development.
2. Public-private partnerships and dialogue.
3. Regulation and reform (i.e. structural changes in the business enabling environment) including but not limited to the following aspects:
   a. financial systems,
   b. market access,
   c. customs systems,
   d. tax systems,
   e. ports and transportation systems,
   f. adjudication and transfer of property, and
   g. conflict resolution and transparency in government and in private transactions and operations.
4. Business and community linkages associated with foreign and domestic investments, including local, municipal, regional, national and sub-regional supply chains, supply chain processes and SMEs.

There will be an emphasis on research that directly involves the private sector. Research will be especially welcome where it examines PSD in Africa that is both ‘sustainable’ and local, i.e. contributing to long term economic development and livelihood creation that does not erode social, human or ecological capital, but rather enhances these assets.

Approximate funding allocation across these areas will be announced in 2006. The allocations may vary according to differing priorities identified in different parts of Africa. Full guidance for research proposal submission will be available in July 2006.

Requests for proposals will be received in the following categories:

Small Grant Program
Fifty grants of up to $10,000 each will be available for each of the two rounds of the project. Typically these grants will be to support the writing of case studies, the work of Masters and PhD students, or to allow scholars and researchers to present papers at international conferences.
**Intermediate Grant Program**
Fifteen grants of up to $50,000 will be available for each of the two rounds of the project. These grants will be peer reviewed and awarded to research proposals that are aligned with the themes and objectives of the Fund and which achieve high scores from the Adjudication Committee.

**Large Grant Program**
In the second round of the project (2007), five grants of up to $100,000 will be awarded. These grants are likely to involve collaborators in more than one country and will be peer reviewed and awarded to research proposals that are aligned with the themes and objectives of the Fund and which achieve high scores from the Adjudication Committee.

The deadline for submission of proposals (for the small and intermediate grants) and for concept notes (for the large grants) is [include date when finalized].
Appendix B: Canadian-African Business School Partnerships

Activities of Selected Canadian Business Schools
An important capacity-building component of the Facility is the awarding of approximately 6 grants of (average) CAD $50,000 to Canadian business schools for proposals to strengthen or establish PSD research capacity-building partnerships with African business schools. This will be undertaken in collaboration with existing global business school networks. Should other donors join this initiative, business schools and other institutions from their respective countries could play a similar role in further augmenting the network.

A competitive call to Canadian business schools will be issued. The facility will use a targeted approach to those Canadian Business Schools with the most intensive international cooperation programs in Africa.

Since David Wheeler and Kevin McKague are involved in the design and delivery of this aspect of the ICBE RF, York’s Schulich School of Business and other faculties at York University will not be eligible to apply in order to avoid any potential conflicts of interest.

Listed below are the top 20 Canadian business schools. Research to date on linkages with African business schools is provided in bullet points below each school.
Draft RFP for Canadian Business Schools to Partner with African Schools

The International Development Research Centre and TrustAfrica/Ford Foundation is pleased to announce the availability of 6 grants of up to CDN $50,000 for Canadian business schools to strengthen nascent or existing partnerships with African business schools for the purposes of building the African private sector development research community.

This Canadian-African capacity building component is part of a larger $3.2 million Facility to support researchers in private sector development based in African universities, business schools and independent research institutions.

The Facility encourages research in the following areas:

1. Entrepreneurship and human capital development.
2. Public-private partnerships and dialogue.
3. Regulation and reform (i.e. structural changes in the business enabling environment) including but not limited to the following aspects:
   a. financial systems,
   b. market access,
   c. customs systems,
   d. tax systems,
   e. ports and transportation systems,
   f. adjudication and transfer of property, and
   g. conflict resolution and transparency in government and in private transactions and operations.
4. Business and community linkages associated with foreign and domestic investments, including local, municipal, regional, national and sub-regional supply chains, supply chain processes and SMEs.

There will be an emphasis on research that directly involves the private sector. Research will be especially welcome where it examines PSD in Africa that is both ‘sustainable’ and local, i.e. contributing to long term economic development and livelihood creation that does not erode social, human or ecological capital, but rather enhances these assets.

Submission of a maximum 10 page proposal is due ___ date.
Appendix C: Draft Call for Nominations for Peer Reviewers and Jury Members

International Development Research Centre and TrustAfrica/Ford Foundation
Investment Climate and Business Environment (ICBE) Research Fund

Call for Nominations for Peer Reviewers and Members of the Pan-African Jury

The International Development Research Centre and TrustAfrica is pleased to announce the establishment of an Investment Climate and Business Environment (ICBE) Research Facility which will make available up to US$2.8 million for researchers in private sector development based in African universities, business schools and independent research institutions.

Nominations are now invited for scholars willing to serve as Peer Reviewers and Adjudication Committee members for the ICBE Research Fund over a period of two years from 2006 to 2008. These are voluntary roles available to active, respected and experienced scholars in Africa with a knowledge of private sector development. All successfully nominated and selected Peer Reviewers and Adjudication Committee members will be expected to attend a one-week conference in July 2006 in Africa.

Nominations may be made by any senior administrator in an African institution using the nomination form provided. Peer reviewers will join a Pan-African Panel of peer reviewers of research proposals and will be requested to review and comment on a maximum of 3-5 proposals per annum either by e-mail or by fax. Adjudication Committee members will meet once per annum to review the comments of Peer Reviewers and select and prioritize proposals for funding. The nature of the funding process is set out in the attached document ‘Obtaining Investment Climate and Business Environment (ICBE) Research Funding’.

Questions on this process may be addressed to:
Kevin McKague, York Institute for Research and Innovation in Sustainability: mckague@yorku.ca

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3 These appointments will not be remunerated as they are considered to be part of the normal duties of active academics involved in research. However they will carry significant opportunities for personal development where international per diems will be paid. Peer reviewers and Adjudication Committee members will not be expected to give opinions on proposals involving their own institution or its collaborators.
Obtaining Investment Climate and Business Environment (ICBE) Research Funding

Qualified scholars will be invited to apply for funds over two funding rounds between 2006 and 2008. Grant funding will be allocated in three program areas:

Small Grant Program
Fifty grants of up to $10,000 each will be available for each of the two rounds of the project. Typically these grants will be to support the writing of case studies, the work of Masters and PhD students, or to allow scholars and researchers to present papers at international conferences.

Intermediate Grant Program
Fifteen grants of up to $50,000 will be available for each of the two rounds of the project. These grants will be peer reviewed and awarded to research proposals that are aligned with the themes and objectives of the Fund and which achieve high scores from the Adjudication Committee.

Large Grant Program
In the second round of the project (2007), five grants of up to $100,000 will be awarded. These grants are likely to involve collaborators in more that one country and will be peer reviewed and awarded to research proposals that are aligned with the themes and objectives of the Fund and which achieve high scores from the Adjudication Committee.

Research Themes
The ICBE Research Fund will invite research proposals in the following thematic areas:

1. Business Research Methods
2. Entrepreneurship
3. Regulation/Reform/Enablement i.e. structural changes to an economy that unleash entrepreneurship
4. Microfinance/banking – capital flows
5. Capacity building and resource mobilization
6. Human capital development

There will be an emphasis on research that directly involves the private sector. Research will be especially welcome where it examines PSD in Africa that is both ‘sustainable’ and local, i.e. contributing to long term economic development and livelihood creation that does not erode social, human or ecological capital, but rather enhances these assets.

Approximate funding allocation across these areas will be announced in 2006. The allocations may vary according to differing priorities identified in different parts of Africa. Full guidance for research proposal submission will be available in July 2006.
**International Development Research Centre and TrustAfrica/Ford Foundation**  
**Investment Climate and Business Environment (ICBE) Research Fund**  

<table>
<thead>
<tr>
<th>Nomination Form for Peer Reviewers and/or Members of the Pan-African Adjudication Committee</th>
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</table>
| **Name and Job Title of Nominating Person**  
(NB Must be a Senior Administrator in an African Institution) |
| **Name of Nominating Institution** |
| **Name and Job Title of Nominee**  
(NB Must be an Employee of an African Institution) |
| **Name of Nominee’s Institution** |
| **Contact Details for Nominee:** |
| **E-Mail:** |
| **Telephone:** |
| **Fax:** |
| **Is The Nominee Aware of the Nomination?**  
Yes or No (please circle one) |
| **Do You Nominate This Person as:** |
| Peer Reviewer | Jury Member | Both (please circle one) |
| **Why Are You Nominating This Person?** |

Please Return this Form to:  
Kevin McKague   Fax int +1 416 364 7541   E-mail mckague@yorku.ca
Appendix D: Potential Candidates for the Jury and Peer Reviewers

The following individuals have been proposed as Jury members to date:
(note: FF = francophone, female; AF = anglophone, female, etc.)

Aminata Niane, Directeur Général, Agence de Promotion de l’Investissement et des Exportations (APIX), Dakar, Sénégal (FF)
Samuel Dossou-Aworet (FM), Executive VP, African Business Roundtable
Ruth Nyakotey, CEO (AF) or Peter Ankrah (AM), Director, Ghana Investment Promotion Centre
Mahmoud Attala, Vice-Chair, Egypt’s General Authority for Investment and Free Zones (AM)
Osey Boeh-Ocansey, Director General, Private Enterprise Foundation, Ghana (AM)
Chris Darroll, Managing Director, SBP, Johannesburg, SA (AF)
Amadou Diaw, President, Institut Supérieur de Management, Dakar, Senegal (FM)
Moustapha Guirassy, Institut Africain de Management, Dakar, Sénégal (FM)
Franklyn Manu, Director, School of Business Studies, GIMPA, Ghana (AM)
Rosalind Thomas, CEO, Development Finance Resource Centre, SADC, Bostwana (AF)
David Creighton, President, CIFA, Montréal, Canada (AM)
Jesse Moore, Care Canada, Toronto, Canada (AM)
Peter Ondeng, President, Aset Capital, Nairobi, Kenya (AM)
George Manu, President, Creative Squares, London, UK (A/FM)
Stephan Malherbe, Director, Genesis Analytics, Johannesburg, SA (AM)