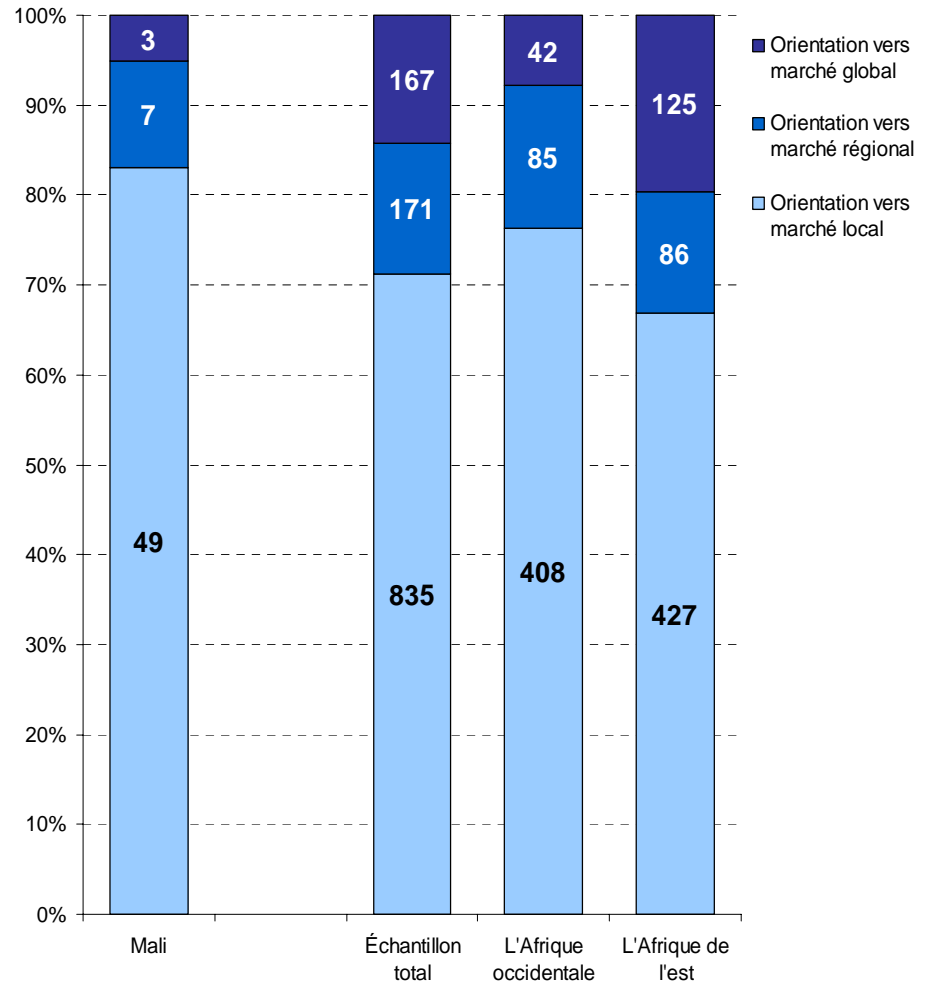
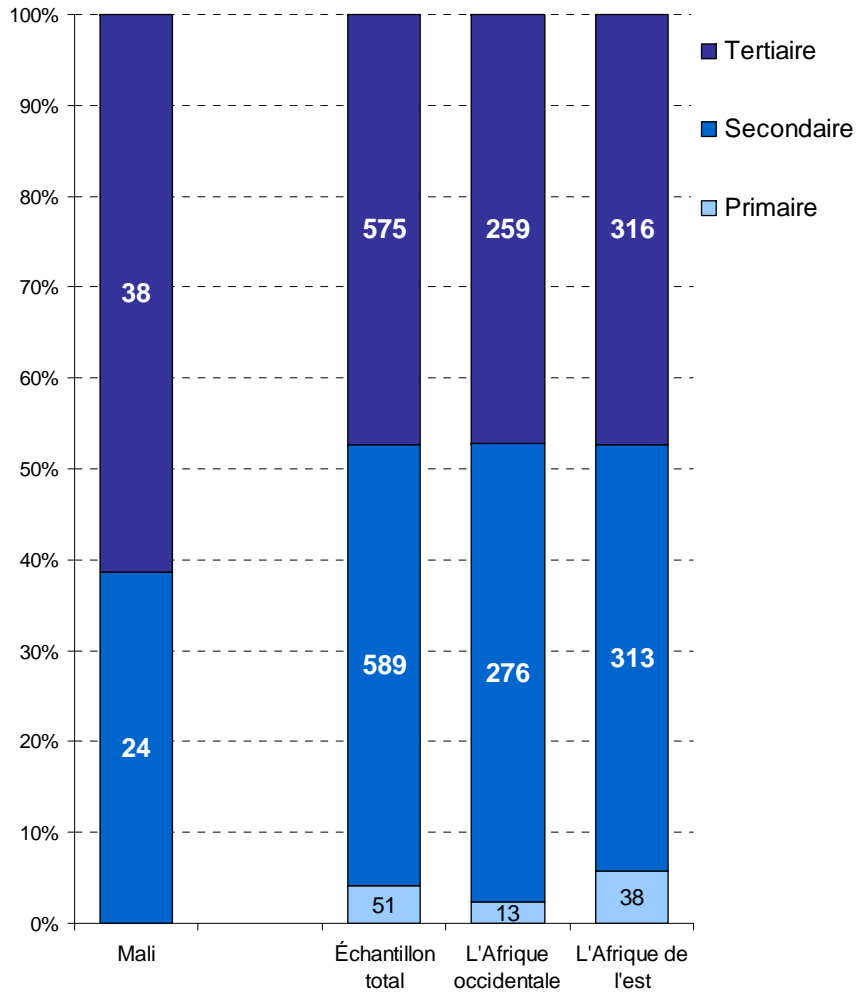


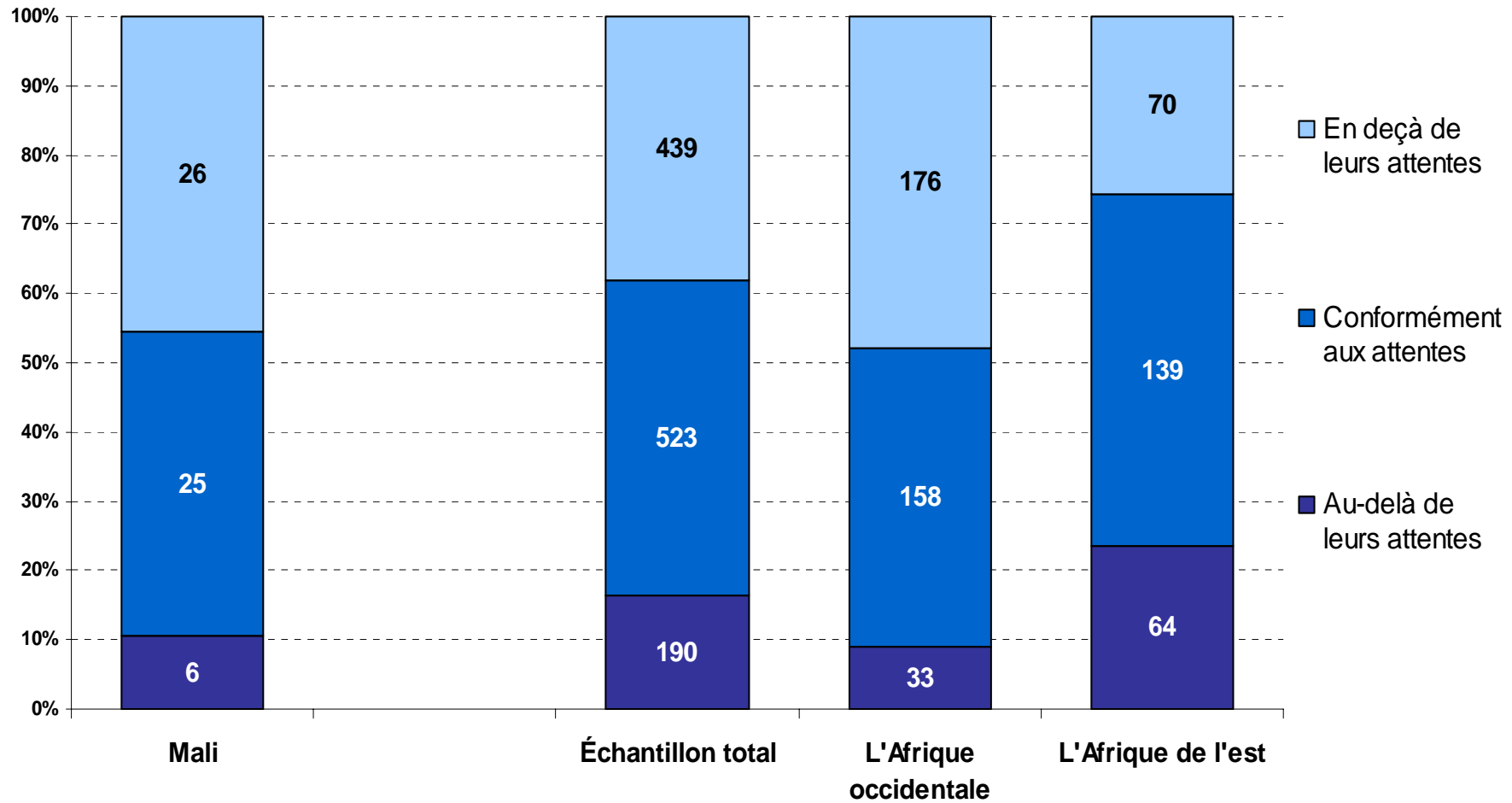


# Les secteurs d'activité et l'orientation du marché



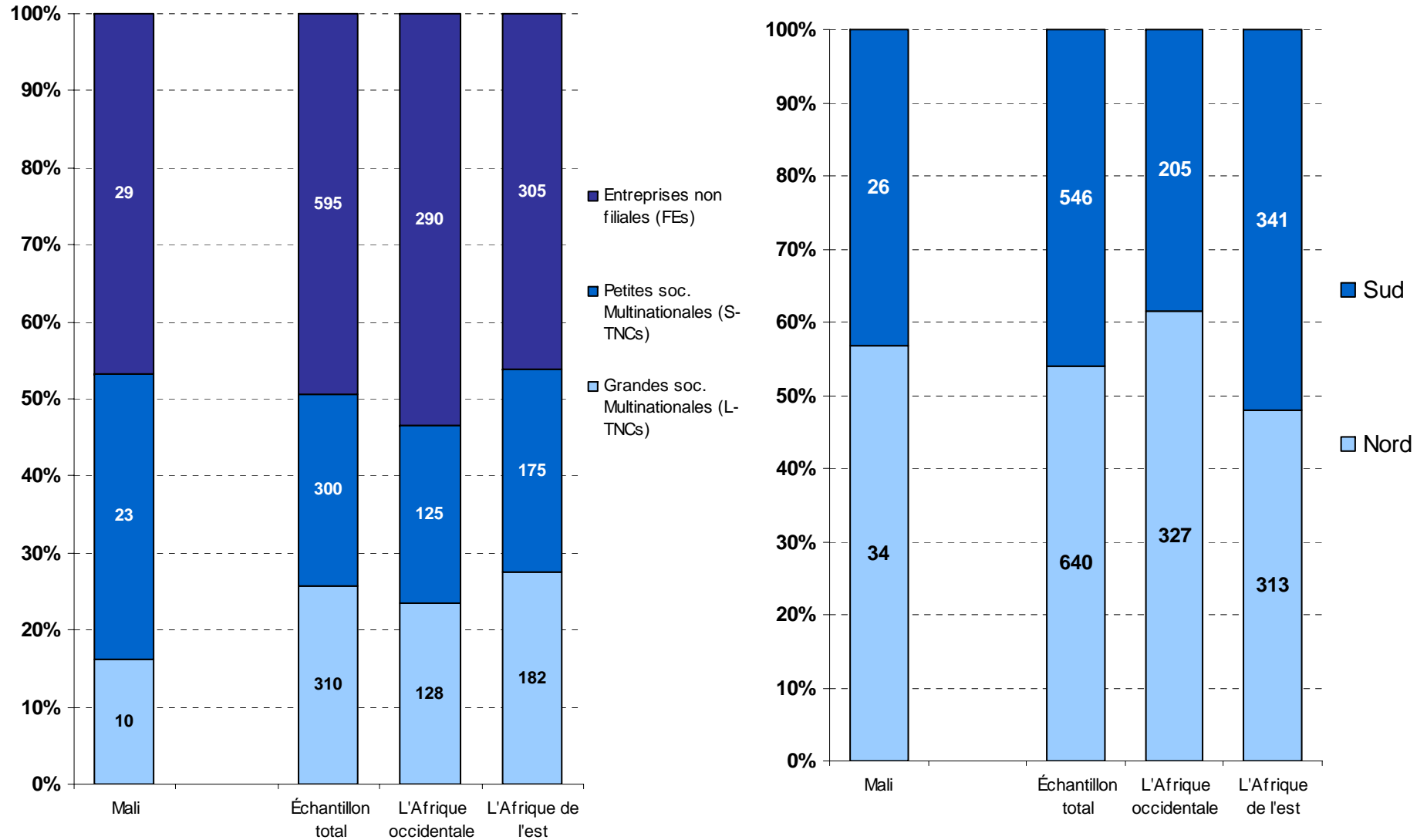


# L'évaluation de la performance passée (en comparaison des attentes initiales)





# La structure organisationnelle et l'origine de l'investisseur

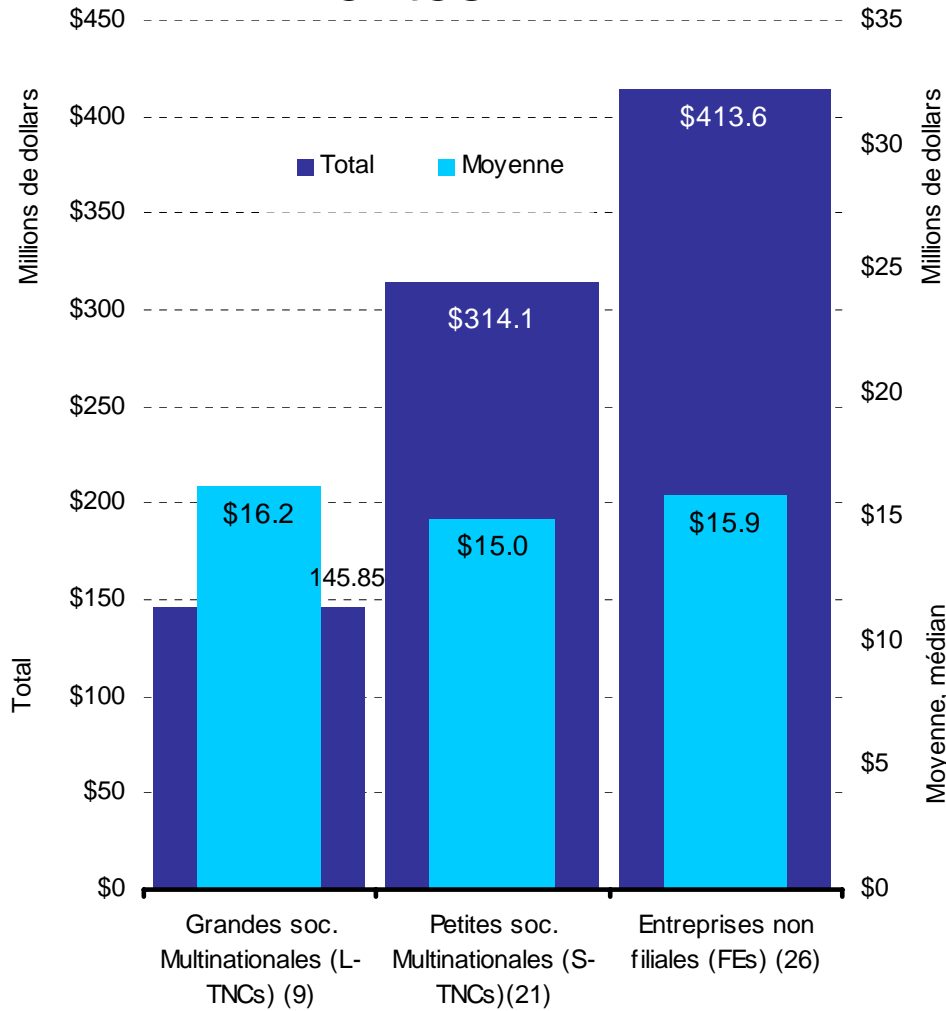




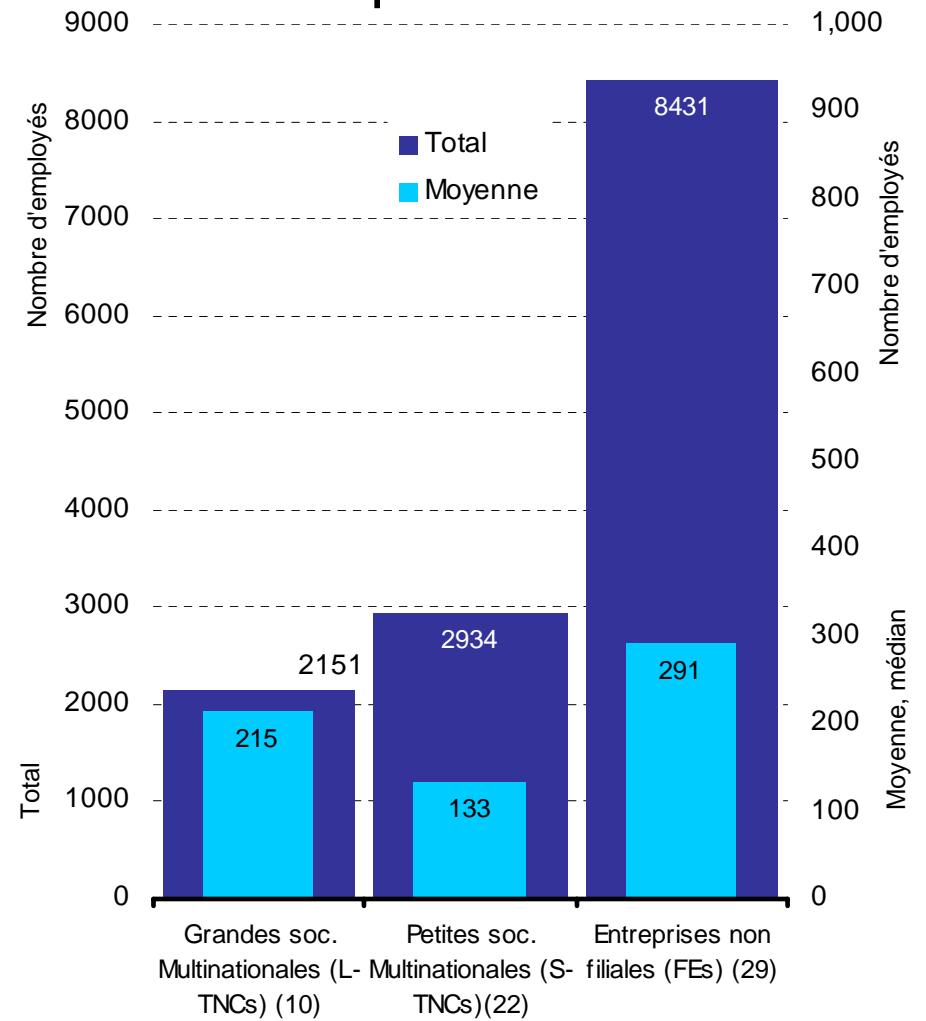
# La structure organisationnelle - Mali



## Ventes

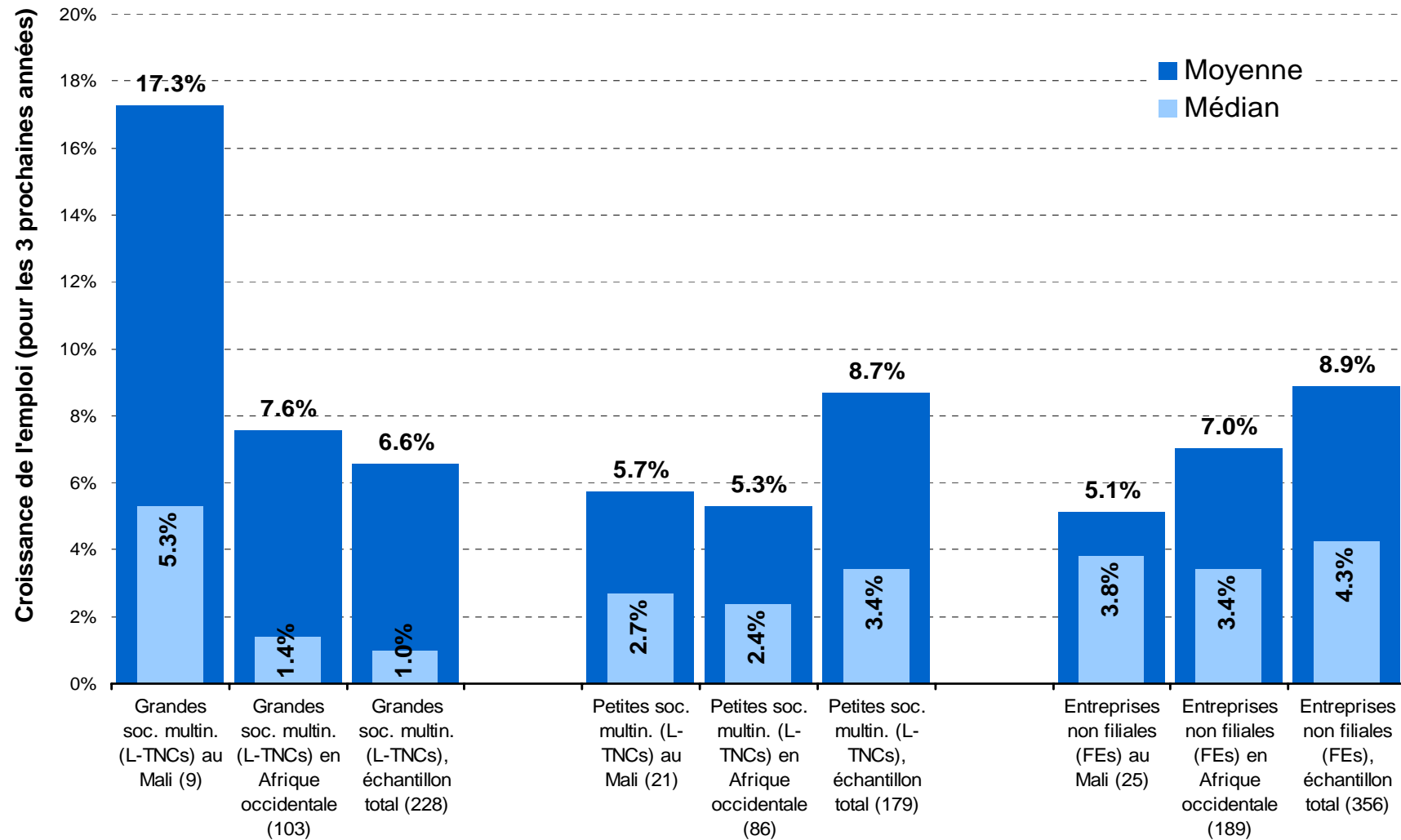


## Emploi





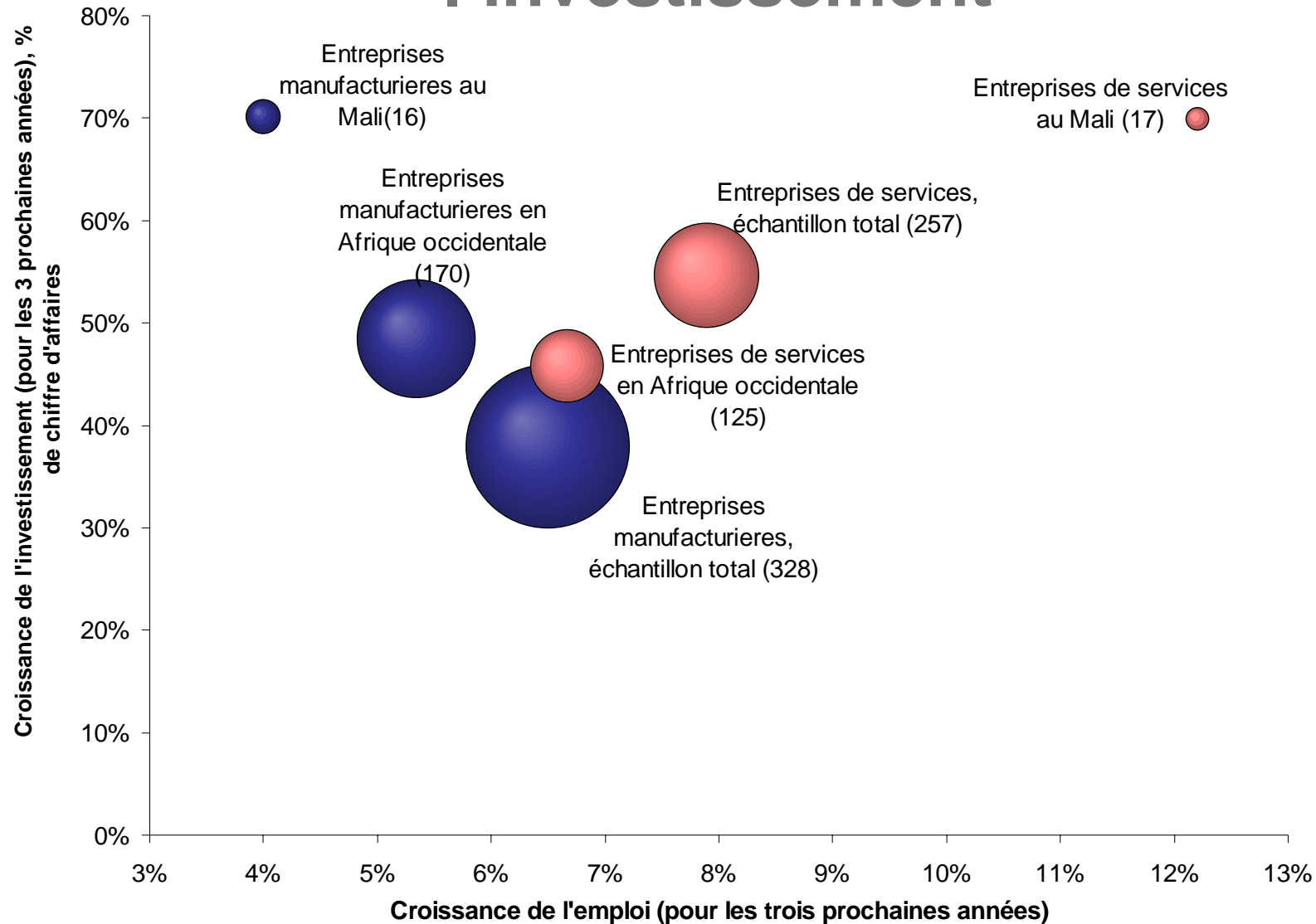
# Croissance de l'emploi



Note: Entreprises avec date de démarrage 2002 et après, et avec plus de 20 employés

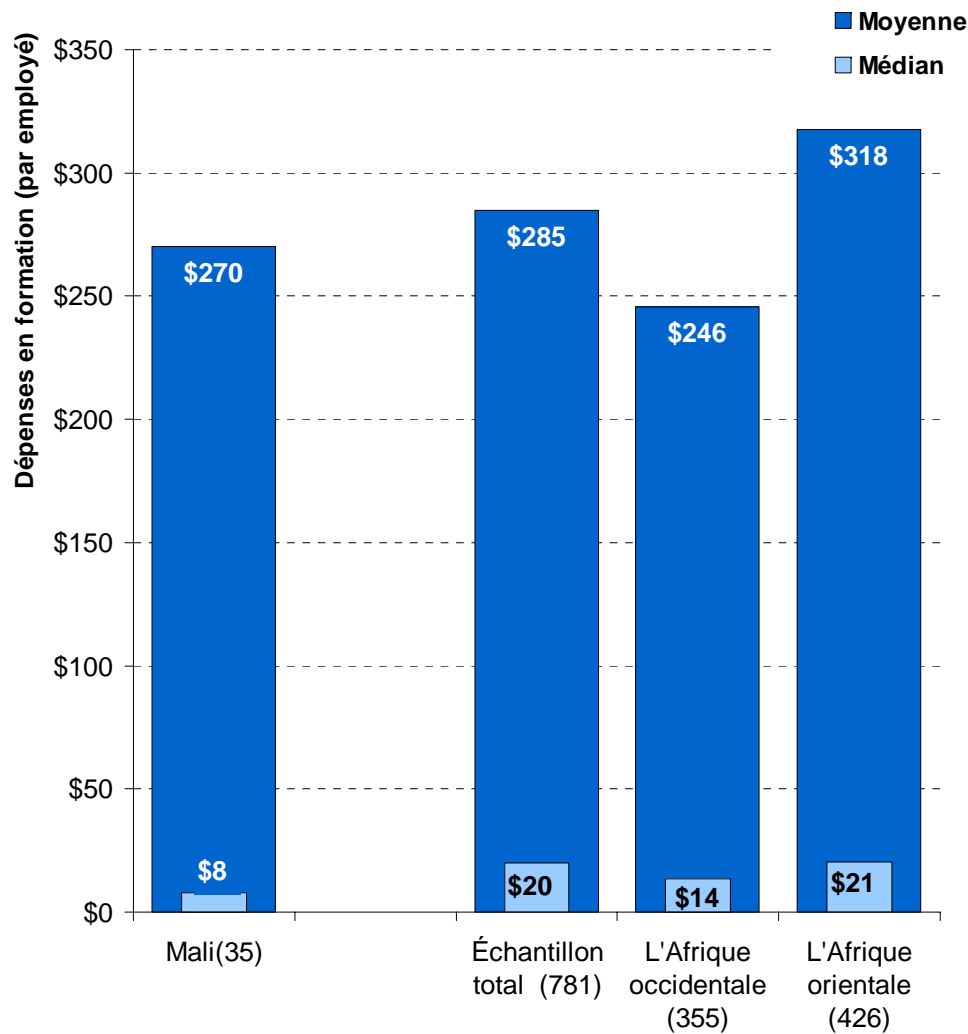


# Croissance de l'emploi et de l'investissement





# Formation et education des employés



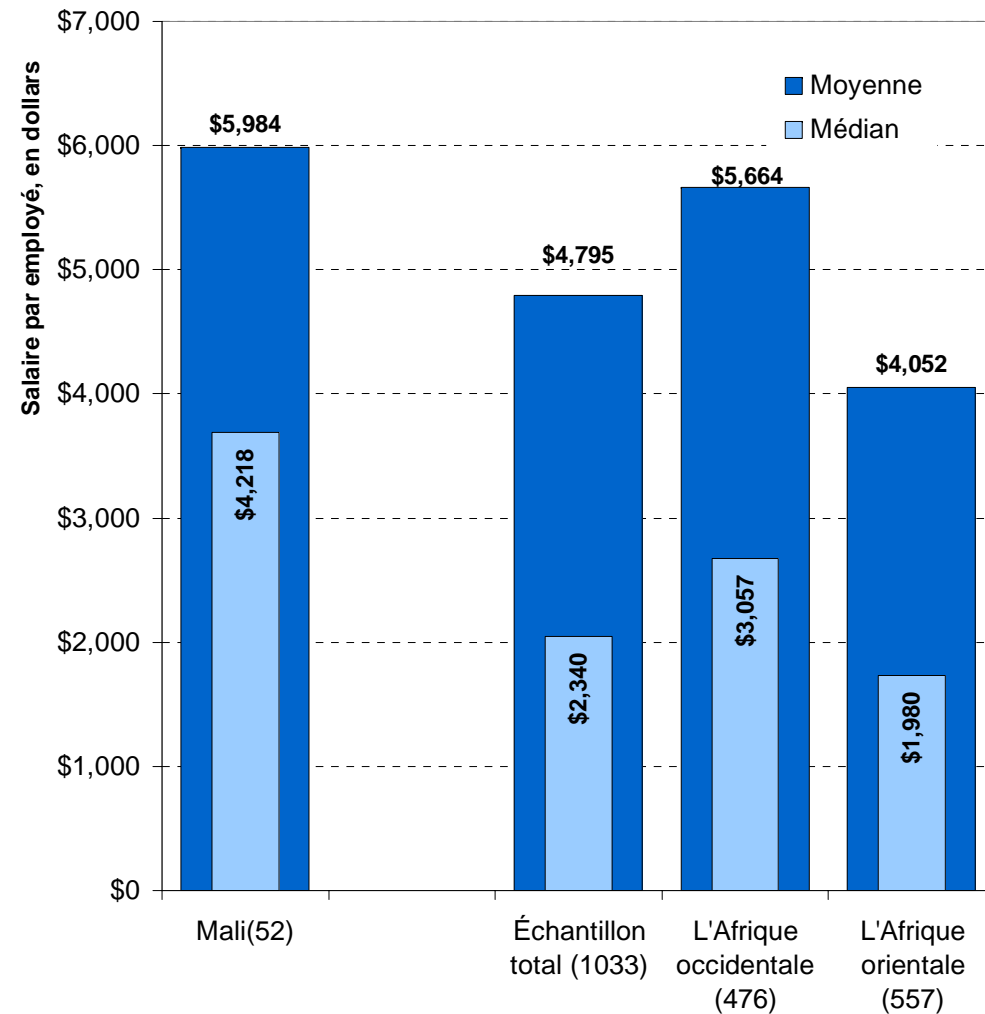
- ▶ More than 60% of the investors are doing some sort of training, but the average expenditure is comparably low
- ▶ Difference between South investors (\$371/worker) and North investors (\$194) high. Especially SSA investors spend a lot on training (\$552)
- ▶ Below average expenditures in food, construction and hotel sectors



# Salaire par employé



- ▶ Mali has one of the highest wage levels of all survey countries
- ▶ Wage level is 25% above the average wage level
- ▶ Wage levels yet reflect the higher labour productivity in Mali (29% above the average labour productivity of the sample)
- ▶ Wage level “appropriate”
- ▶ Transport and financial companies pay the highest wages (\$8000 and \$15300); chemical, food and construction pay one of the lowest wages
- ▶ Older companies pay high wages

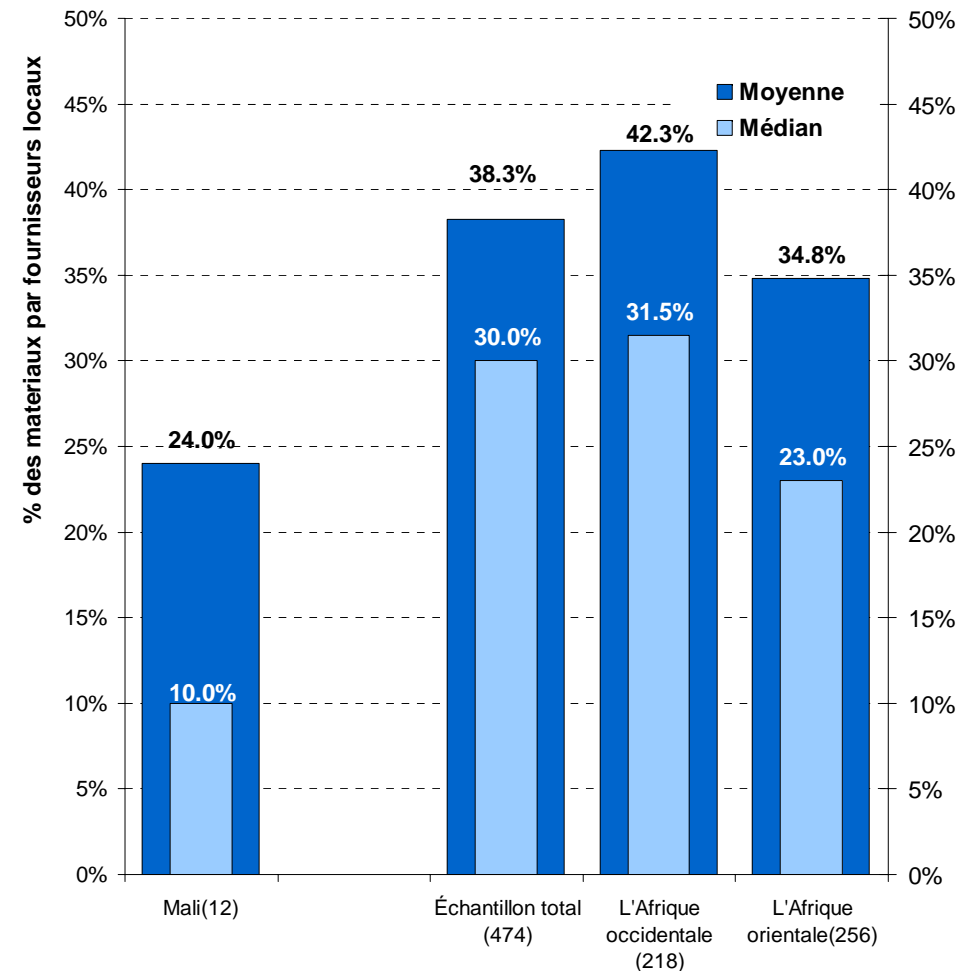




# Ressources locales

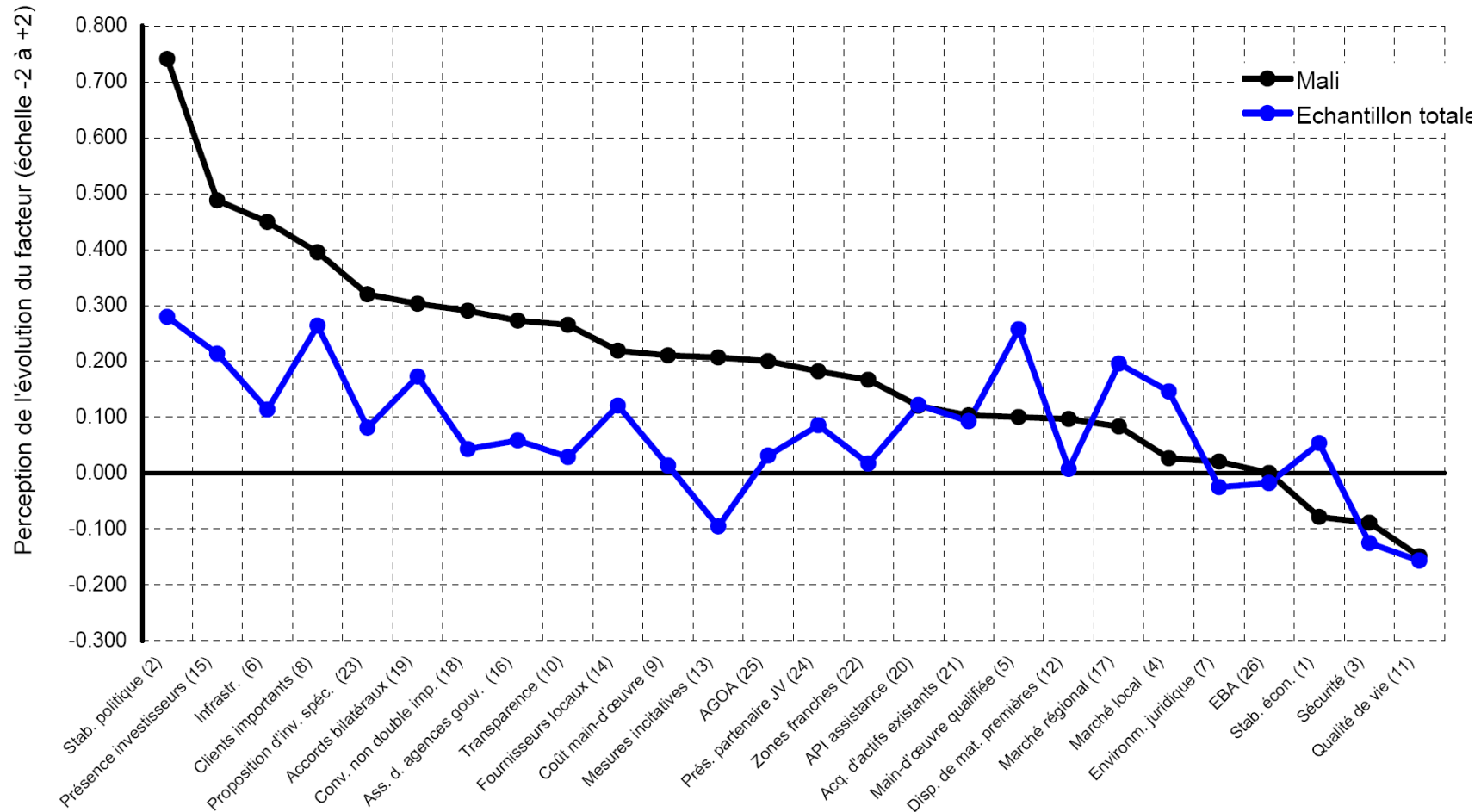


- ▶ Local content only measured for the manufacturing sector in Mali which is dominated by foreign entrepreneurs.
- ▶ One of the lowest local content percentage of all survey countries
- ▶ High potential for local supply chain upgrading





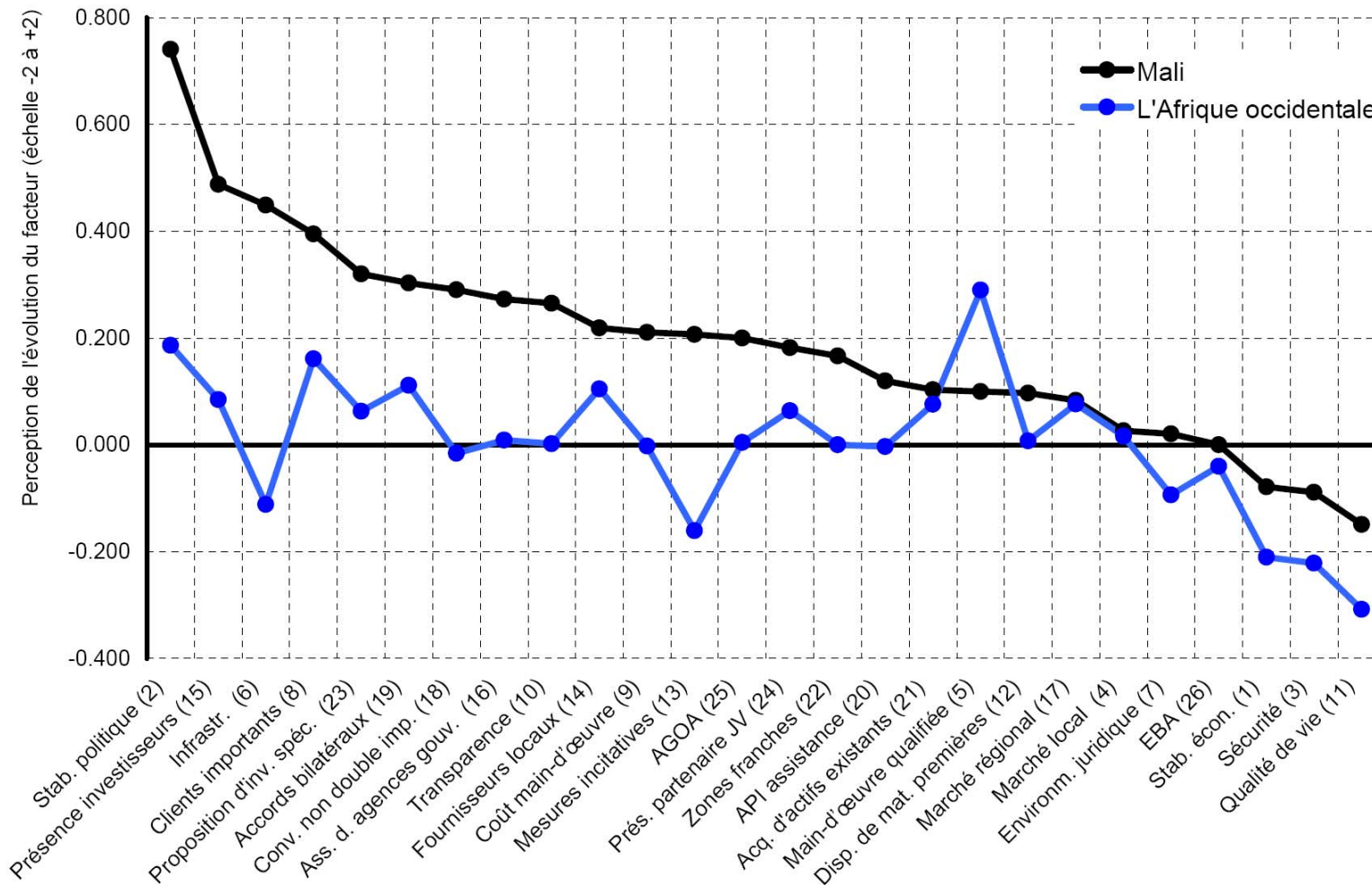
# La perception quant aux facteurs de localisation – Mali vs. échantillon total



Note: The numéros entre parenthèses représentent indice d'importance du facteur attribué par échantillon total



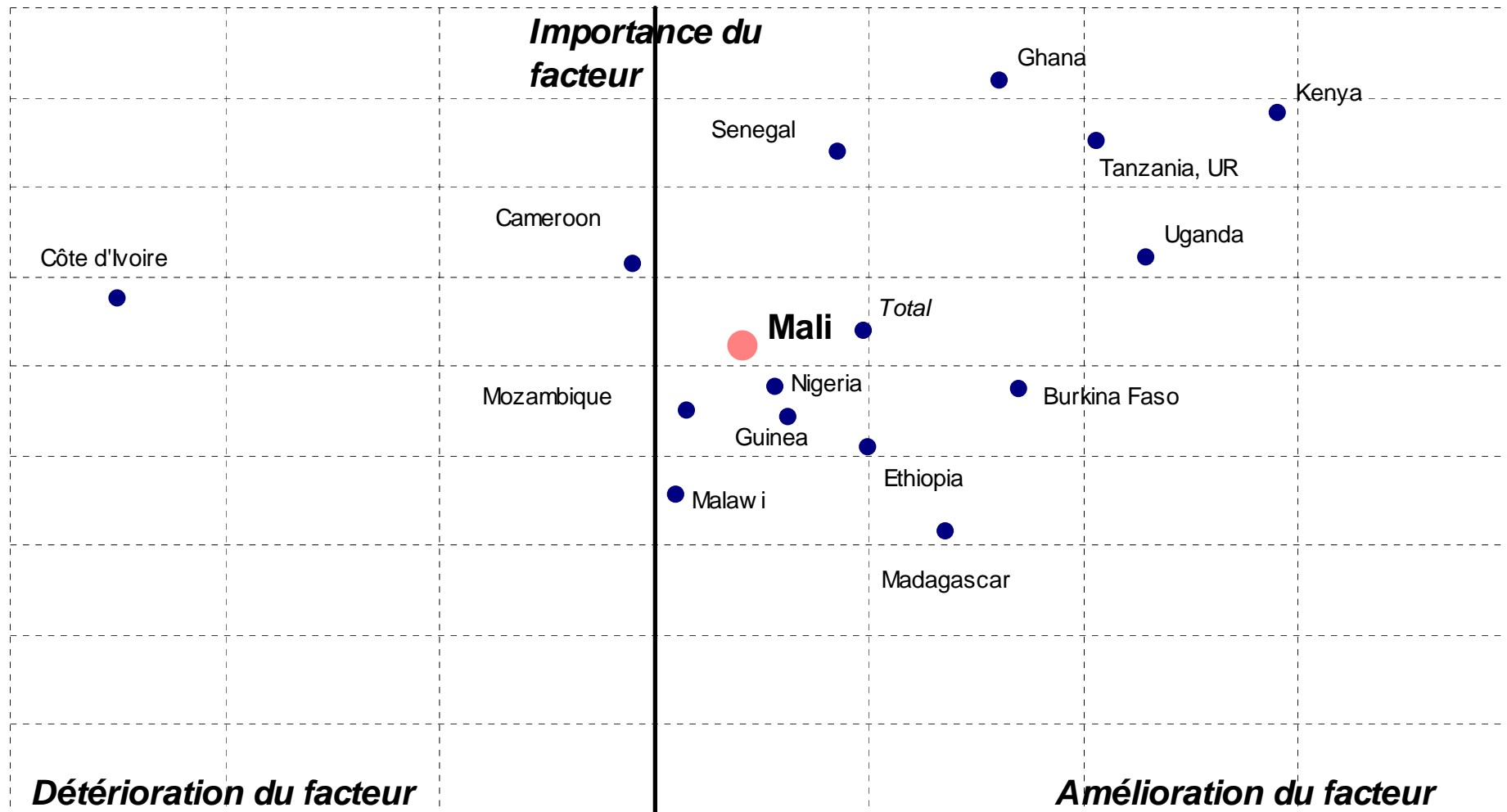
# La perception quant aux facteurs de localisation – Mali vs. Afrique occidentale



Note: The numéros entre parenthèses représentent indice d'importance du facteur attribué par échantillon total



# Les marchés régionaux





# Key outcomes for Mali



- ▶ Foreign investment to Mali is primarily local-market seeking. Local market conditions are therefore crucial for companies.
- ▶ Political stability is assessed much better than in other survey countries, qualified labour force is seen as worse.
- ▶ Investors are very eager to invest new capital, in particular investors from with Sub-Saharan Africa
- ▶ Fast-growing food & drink and hotel sector
- ▶ LTNCs in Mali exhibit highest employment and investment growth
- ▶ Investment promotion may be more tailored to the small FE investors who seem to be relatively unhappy with their own performance (50% below expectations) and thus reluctant to invest more,
- ▶ FEs have the highest employment impact, as they are in the more labour-intensive manufacturing sectors
- ▶ The importance of regional markets in Mali is moderate with a high potential of upgrading