



REPORT ON THE AMCHAM U.S. TRADE MISSION NEW YORK AND WASHINGTON DC OCTOBER 30TH & 31ST, 2018

MISSION HIGHLIGHTS, OUTCOMES AND RECOMMENDATIONS

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INTRODUCTION

From October 28 to November 2, 2018 the American Chamber of Commerce (AmCham) Kenya, in collaboration with the State Department for Trade and with the support of the Commercial Service of the U.S. Embassy in Kenya, held a trade mission to the U.S. covering New York and Washington DC to promote trade and investment opportunities in Kenya under the Big Four Agenda. The mission coincided with the launch of the first non-stop Kenya Airways flight to New York and comprised of one business and investment briefing forum, one bi-lateral and one tri-lateral meeting, business-to-government engagements and a networking reception. This report provides a background on the mission, highlights of the key activities that took place and the outcomes and learnings from the mission.

BACKGROUND

AmCham's core mandate is to promote trade and investment between Kenya and the U.S. Following the hugely successful AmCham Economic Summit 2018 on the Big Four Agenda, that saw a total of 70 U.S. Government and business leaders attend, including the U.S. Under Secretary for International Trade Gilbert Kaplan and members of the President's Advisory Council on Doing Business in Africa (PACDBIA) as part of their fact-finding mission to Kenya; it was recommended that a follow-up occur to provide in depth information on the specific project opportunities under the Agenda and further one-on-one engagement with interested investors and businesses on these opportunities.

The final PACDBIA report also recommended better information dissemination on the opportunities, while being plain about the existing challenges and how to mitigate risks, as a means to spur U.S. private sector interest and counter their lack of participation in Kenya's commercial opportunities especially around the Big Four Agenda. Further, the MoU signed between Kenya and the U.S. during this visit made this information dissemination a priority.

The launch of the first non-stop Kenya Airways flights to New York, a historic event for Kenya, provided an opportunity to promote and raise awareness on these opportunities backed by the increased connectivity and convenience of travel between the two countries provided by the flights; and subsequently, the increased potential of expanded commercial opportunities between the two countries.

The choice of states for the mission was informed by the nature of the planned forum and the location of the partners involved. New York being the financial hub was deemed ideal to host an investor briefing. Washington on the other hand provided the opportunity to have policy-focused conversations and engage with representatives of the U.S. Department of Commerce, the United States Trade Representative (USTR), the United States Trade and Development Agency (USTDA), the Overseas Private Investment Corporation (OPIC) and the Export–Import Bank of the United States (U.S. EXIM Bank).

Finally, AmCham has a strategic priority to enhance business leadership by positioning the organization as a champion for economic and social prosperity. Aligning with Kenya's Big Four Agenda is one of the ways this can be done; to identify and promote the opportunities in this agenda that contribute to social and economic prosperity. The trade mission, to raise awareness on these opportunities was therefore a good fit in line with this goal.

MISSION OBJECTIVE

The main objective of the mission was to bridge the information gap and reshape the narrative on doing business in Kenya by showcasing business and investment opportunities under the Big Four agenda.

Specifically, the mission aimed to:

 Showcase Kenya's business and investment opportunities under the Big Four Agenda by outlining potential areas for U.S. commercial engagement, including a list of projects under each pillar of the Agenda.

- 2. Build on the recent increased engagement between Kenya and the U.S. to bolster U.S. Kenya commercial engagement by promoting Kenya as an investment destination and spurring U.S. business and investor interest in Kenya.
- 3. Build interest and momentum for the AmCham Investment Summit as the forum for insight on trends, opportunities and constraints to trade and investment in key sectors in Kenya and the greater East African region as well as direct government-business and business-business engagement to spur increased trade and investment between Kenya and the U.S.

DELEGATES

Delegates included AmCham member companies, Kenya Government officials and the Commercial Service of the U.S. Embassy in Nairobi. The Kenya private sector had representatives from the Kenya National Chamber of Commerce and Industry (KNCCI) and the Kenya Private Sector Alliance (KEPSA). *See Appendix A for the full list of delegates*

MISSION HIGHLIGHTS

NEW YORK

Event: Doing Business in Kenya Business Forum

Date: October 30, 2018

Venue: Citi Executive Centre

Sponsor: Citi Bank

Partners: Corporate Council for Africa and the Government of Kenya

Over 90 people attended this half-day forum focusing on the opportunities available under the Big Four Agenda, government initiatives to encourage private sector participation in these opportunities and providing an investor brief on the overall business environment in Kenya including testimonials from private sector members operating in the country.

The session program was ordered as follows:

Opening Session and Welcome Remarks

Keynote Address

• Q & A Session with Kenyan Government on the Big Four Agenda

• A Private Sector Perspective on the Kenyan Economic Agenda

Closing remarks

Highlights of the Keynote Address by Amb. Dr. Monica Juma, Cabinet Secretary,

Ministry of Foreign Affairs

Amb. Juma outlined the clarity of policy on development priorities for Kenya provided by the Big Four Agenda, highlighting the existing need to develop requisite innovative tools, means, solid networks and partnerships necessary to bring the vision to fruition. She challenged businesses to play their role in unlocking synergies with the U.S., having an opportunity to leverage on the financial capital and broad innovation capabilities of the U.S. as well as Kenya's affordable and competent human capital.

Highlights of Remarks on Behalf of the U.S. Government by Joel Szabat, Deputy Assistant Secretary (DAS) for Transportation Policy, U.S. Department of Transportation

DAS Szabat reiterated the deep value the U.S. places on its relationship with Kenya and its demonstrated commitment to bolster commercial ties. He spoke of the role that businesses play in giving political ties meaning through engagement in unlocking synergies such as those unlocked by the non-stop Kenya Airways Nairobi - New York flight service, opening new avenues for trade, tourism, and business to achieve a brighter future for Kenyans and Americans alike. He also spoke about the journey to the realization of this flight and how that facilitated development in human resource and sharing of skills through the teamwork of the U.S. and Kenyan civil aviation authorities as well as elevating and facilitating growth in international aviation on the continent.

Highlights of Presentation on Kenya's Big Four Agenda by the Principal Secretary, State Department of Investment and Industry - Betty Maina

PS Maina's presentation focused on the overall goals of the Big Four and provided a detailed brief on doing business in Kenya.

Panel Discussions

The first panel discussion served as an opportunity for the audience to engage directly with the Kenyan government representatives present on the specific opportunities available under the Agenda. One of the companies' present was able to get a way forward on an environmental project.

In the second panel discussion, AmCham members had the opportunity to narrate their experience of doing business in Kenya to attendees and answer questions. Key highlights included their experience in the setting up process, fulfilling market demand and finding qualified workforce.

See Appendix B for the full speaker list

PICTORIAL - NEW YORK FORUM













Speakers at the Doing Business with USA Forum in New York (From top to bottom, left to right)

- Amb. Dr. Monica Juma Cabinet Secretary, Ministry of Foreign Affairs Kenya
- Joel Szabat Deputy Assistant Secretary (DAS) for Aviation and International Affairs, U.S. Department of Transportation
- Betty Maina Principal Secretary, State Department of Investment and Industry Kenya
- Florie Lizer President, Corporate Council on Africa
- Dr. Chris Kiptoo Principal Secretary, State Department of Trade, Kenya
- Maxwell Okello Chief Executive Officer, AmCham Kenya











1. Q&A panel session with Kenya government representatives on the Big Four Agenda. 2 – 3. Panel discussion with AmCham members sharing their Doing Business in Kenya experience. 4. Michael Mutiga Managing Director, Corporate and Investment Banking, Citi Kenya. 5. Group photo with (*from left to right*): Kiprono Kittony, Chair, Kenya National Chamber of Commerce and Industry, Amb. Dr. Monica Juma, Cabinet Secretary, Ministry of Foreign Affairs, Florie Lizer – President, Corporate Council on Africa, Maxwell Okello – Chief Executive Officer, AmCham Kenya, Amb. Njeru Githae - Kenya Ambassador to the U.S., and Michael Mutiga - Managing Director, Corporate and Investment Banking, Citi Kenya.

WASHINGTON DC

Event: The Kenya Direct Flights Trilateral Business Forum

Date: October 31, 2018

Venue: U.S. Chamber of Commerce

Partners: U.S. Chamber of Commerce – U.S. - Africa Business Centre and the Government

of Kenya

This forum brought together representatives from the U.S. and Kenyan Governments and private sector to dialogue on key requirements to drive commercial cooperation between

the two countries and better support the private sector in taking advantage of available

opportunities and provide introductory deliberations on a possible model for engagement

to achieve this. On the Kenyan side, representatives gave an overview of opportunities and

progress made in attracting private sector participation across the different sectors of the

Big Four Agenda. U.S. side representatives on the other hand defined where and how their

individual organizations or departments could get involved, what they had to offer and the

criteria for their involvement including a possible engagement framework going forward.

Highlights of the Presentation on Kenya's Big Four Agenda by Betty Maina – Principal

Secretary, State Department of Investment and Industry, Kenya

PS Maina gave an introductory presentation on the goals of the Big Four Agenda in

manufacturing, provision of affordable housing, universal health coverage and food

security, touching as well on the business operating environment in the country. The

presentation then gave opportunity to representatives of the different pillars present at the

forum to give further information on the specific focus of each pillar and the progress so far.

Highlights of Remarks by Prof. Hamadi Boga – Principal Secretary, State Department

of Agriculture and Research, Kenya

With agriculture currently the driver of Kenya's economy contributing 31% of GDP directly

and up to 57% indirectly, Prof. Boga provided an overview of the current focus for

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improving food security in the country in line with achieving the goals of the Big Four Agenda as:

- Increasing productivity for all the major crops
- Increasing technology and mechanization
- Reducing post-harvest losses for crops, livestock products and fish
- Irrigation technology
- Value addition
- Consolidating data to support decision making by private sector, farmers and policy makers.

Highlights of Remarks by Ngatia Kirungie – Representative for Ministry of Transport, Infrastructure, Housing and Urban Development

Mr. Ngatia reiterated the current situation in regard to housing in the country and the focus of the Big Four Agenda. He went further to outline the current challenges experienced by the sector and the corresponding Government interventions to ensure private sector participation as follows:

a) Supply Side

<u>Challenge</u> – Developers are only willing to develop the number of units they are confident can be taken up by the market.

<u>Government Intervention</u> – The formation of the National Housing Revolving Fund to take up the completed units by private sector developers, leading to reduced risk for developers.

b) Demand Side

<u>Challenge</u> – Accessibility and affordability of home owner finance or mortgages. Currently, Kenya, with a population of 45 million people has only 25,000 mortgages, demonstrating a significant failure of the banking system to address the challenges of home ownership.

<u>Government Intervention</u> – The National Housing Revolving Fund intends to sell units to the public through a tenant purchase scheme with repayment tenure periods of 20 - 25years. Current mortgage terms in Kenya are 10 - 15 years. For higher income earners the Kenya Mortgage Re-Finance Company setup by the Treasury and the World Bank will provide banks and credit and savings cooperatives long-term financing credit lines to enable them to provide longer mortgage repayment tenure periods and lower monthly payments.

c) Legal Framework

<u>Government Intervention</u> - The introduction of 50% off corporate tax for developers who build more than 100 units in a year, 15% affordable housing tax relief for savers who save into the Affordable Housing program and a waiver of stamp duty for first time home buyers.

Highlights of Remarks by Dr. Chris Kiptoo - Principal Secretary, State Department for Trade, Kenya

Dr. Kiptoo covered the goals of the Technical Working Group setup following the visit by President Kenyatta to the U.S. where he and President Trump agreed to form the Working Group to focus on:

- Kenya's post AGOA trade relationship with the U.S.
- Maximizing AGOA for the remainder of its lifetime about six and a half years
- Strengthening commercial cooperation between the two countries through the provisions of the MoU
- Addressing trade barriers

He also re-affirmed the need for Kenya to bring more specificity around the projects and welcomed the input of the U.S. as a partner in the process.

Highlights of the Presentation by Seward "Skip" Jones - Deputy Assistant Secretary for Middle East and Africa, U.S. Department of Commerce

DAS Jones presented on the model of engagement proposed by the U.S. government to spur and support U.S. private sector participation in economic opportunities in Kenya as well as the overall commercial engagement between the two countries.

On the MoU, he urged the government of Kenya side to provide detailed and quality information on the key projects that they would like to engage the U.S. on, where they think the U.S. can offer solutions. This information can then be pushed through the Department of Commerce network and deal teams across the U.S. Once an American company expresses their interest in any of the projects, the U.S. government can then determine how best to support that private sector proposal.

He mentioned that it would also be important to focus on identifying and resolving potential constraints and obstacles for which a business climate issues taskforce would be put in place supported by the joint efforts of the Technical Working Group.

Highlights of Remarks by Constance Hamilton - Assistant U.S. Trade Representative for Africa

The focus of her remarks was the outcomes of her team's recent trip to Kenya which served as an initial exploratory visit to set the stage for the technical working group which would focus on:

- Exploring a future Kenya-U.S. trade and investment framework
- Strengthening commercial cooperation and also support the goals of Kenya's Big Four Agenda.
- Working together to maximise the remaining years of AGOA guided by the Kenya National AGOA Action Plan.
- Developing short-term solutions to reduce barriers to trade and investment and to drive trade and investment in the short term as work continues on other ways to deepen trade and investment relationship in the longer term.

Highlights of Remarks by Worku Gachou - Managing Director for Africa, Overseas Private Investment Corporation (OPIC)

He emphasized the need for deals to be commercially viable and in line with OPIC's development agenda to be eligible for OPIC support. This is in line with OPIC's offerings in debt financing and political risk insurance. OPIC's Connect Africa Initiative which has committed \$1 Billion over the next two years in development funding in Africa focusing on ICT, transport and logistics and value chains to help increase domestic processing was highlighted as a program whose goals are aligned to the goals of the Big Four Agenda and could be leveraged.

The impact of the BUILD Act on OPIC's ability to support development agendas such as the Big Four Agenda was also discussed covering:

- Increased lending capacity from \$30 million to \$60 million,
- Ability to offer equity products and
- Ability to lend in the local currency.

Highlights of Remarks by Katrien Hinderdael - USTDA Country Manager East Africa Region

Her remarks expressed the USTDA's keenness, as the project preparation assistance arm of the U.S. government, working in all infrastructure spaces with the priority sectors as: ICT, transportation and energy to expand their Kenyan portfolio and their openness to discuss projects in the Big Four Agenda especially in health and agriculture based on areas where either U.S. companies or their partners are interested in.

She reiterated their focus as helping U.S. companies interested in these projects get involved by help them de-risk the projects at an early stage through funding feasibility studies and providing technical assistance to help projects reach financial close. She however emphasized that projects would be evaluated based on the following to qualify:

- Development impact,
- U.S. export potential,
- Strong partners and
- Government enabling environment for the project to move forward.

Highlights of Remarks by Rick Angiuoni - Office of Policy Analysis and International Relations, U.S. EXIM Bank

These remarks focused on the workings of the U.S. EXIM Bank. The need for bankability and more detailed information on the proposed projects was however strongly emphasized.

Highlights of the Presentation by Heba Shams - World Bank Group, Lead Investment Policy Specialist

The news on Kenya moving up 19 points to number 61 on the Ease of Doing Business Index had just been announced the morning of this forum and thus the presentation focused on expounding the significance of the news. Kenya's move on the Ease of Doing Business Index

was confirmed to be based on real reform and projecting the right signals to potential investors. The presentation also provided pointers on how to attract and maintain investors in light of the goals of the Big Four Agenda.

Highlights of the Roundtable Discussion moderated by Maxwell Okello – Chief Executive Officer, AmCham Kenya

Q. Amb. Robin Sanders – Housing entity for mortgages – the financing packages are organized but the banks and private entities still need some kind of guarantee and how are fintech and cashless systems being used?

A. Ngatia Kirungie – The National Housing Revolving Fund being the main up taker of the housing units removes the need for a guarantee. Blockchain is being applied in allocation of housing units. The online housing portal will ensure fair allocation and allow the allotted to save to the system.

Maxwell Okello – Ngatia, if you could speak on alternative building technologies.

A. Ngatia Kirungie – The Government is looking to use alternative building technologies tried and tested in other markets to reduce construction time from 36 months to 18-24 months depending on the scale of the development. They are also looking to alternative construction materials such as aluminium foam work where you can replicate the same housing design and concept over multiple sites projects and EPS technology. The challenge is that the economic benefit for these alternative technologies kicks in with scale and so you need a critical size and total number of units to build to feel the benefits but the 1500 units per site and some up to 20,000 being done under the Big Four covers that. Investors are already requesting for land to put up factories for these technologies because they understand the scale of the opportunity.

Floor remarks by Kiprono Kittony Chair – Kenya National Chamber of Commerce and Industry (KNCCI) – He suggested a collaboration between U.S. Chamber, AmCham Kenya, KNCCI and the Kenyan government to develop a portal for deal flow in the private sector as

well as creating a collaborative platform between Kenyan and U.S. SMEs. He also highlighted Kenya's capacity for innovation providing a huge potential for American technology in the ICT sector, specifically in blockchain and Artificial Intelligence.

Q. Peter Karenge, President B360 - Although there is demonstrated focus, strategy, improvement in ease of doing business, what needs to be done especially by businesses operating in both Kenya and the U.S. to unlock financing?

A. Skip Jones Part of the challenge has been driving U.S. Private sector interest in the opportunities but raising awareness through the provisions of the MoU and the outreach work envisioned by the MoU might help. There is a major conference planned in the coming year to create a buzz about the attractiveness of the African market including Kenya.

A. Rick Angiuoni, **EXIM Bank** - Factors considered when reviewing financing requests by the bank include:

- Financing risk
- Operating risk
- Social risk
- Environmental risk
- Market risks

If these can be calculated, then they can be mitigated. Provided that they can be mitigated then the financing can be provided. Kenya, for example, has successfully calculated and offered mitigation measures for affordable housing. On involvement of SMEs the Bank intends to do so through export assistance centres.

Additional Remarks by Dr. Kiptoo – Speaking on the Kenya government portal for private sector projects, he mentioned the \$500 million project to digitize government operations including providing details of government procurement online.

TESTIMONIALS

Brenda Mbathi, Executive Director Govt. Affairs and Policy Eastern Africa GE: She reiterated the immense opportunities available to investors and the significant projects that GE has participated in in the country.

Michael Mutiga, Managing Director, Corporate and Investment Banking, Citi Kenya: He highlighted Citi's success in its 44 years in Kenya, currently serving 600 corporate clients and the government with a focus on financing transactions. He tagged Kenya as an invest to grow country.



PICTORIAL — DC FORUM 1 – 2. The iconic Hall of Flags at the U.S. Chamber, the forum venue. 3. Betty Maina - Principal Secretary, State Department of Investment and Industry giving an overview of the Big Four Agenda. 4. Brionne Dawson – Director Africa, U.S. – Africa Centre, U.S. Chamber of Commerce. 5. Heba Shams - Lead Investment Policy Specialist, World Bank Group. 6. Maxwell Okello – CEO – AmCham Kenya. 7. Kiprono Kittony, Chair, Kenya National Chamber of Commerce and Industry. 8. Group photo with Seward "Skip" Jones - Deputy Assistant Secretary for Middle East and Africa, U.S. Department of Commerce (*third from right*) 9. Rick Wade, Vice President of Strategic Alliances and Outreach at the U.S. Chamber of Commerce speaking at the cocktail reception.

MISSION OUTCOMES

U.S. Companies

- Received exposure to current projects and investment opportunities in Kenya under the Big Four Agenda with a breakdown of the focus areas.
- Had an opportunity to hear directly and engage with Kenyan Government representatives and American businesses already operating in Kenya.
- Received credible, first-hand market information on Kenya as a business and investment destination.

Kenyan Delegation

- Were able to position Kenya as an exceptional investment destination.
- Opportunity to create linkages and partnerships with U.S. government agencies and private sector companies.

RECOMMENDATIONS

Based on the outcomes and learnings from this mission, we recommend that:

- AmCham leads sector-specific missions, as a follow-up, to explore American private sector solutions, technology, and expertise that can support the realization of the development goals outlined in the Big Four Agenda and well as provide linkages for Kenyan and U.S. government and businesses to establish or enhance relationships.
- 2. That the AmCham Investment Summit 2019 be used as a forum to:
 - o Attract U.S. investors and businesses to view, engage and interact with opportunities in Kenya under each pillar of the Big Four Agenda.
 - Provide opportunity for U.S. businesses to showcase their products, services, processes and technologies that can support the realization of the Big Four Agenda.

- Provide direct government-business and business-business engagement to enhance commercial collaboration.
- 3. That the government of Kenya collaborate with AmCham in packaging bankable, investor-ready projects targeting the American market.
- 4. That AmCham be included in the technical working group and the deal team to provide the necessary U.S. private sector voice and perspective.

APPENDIX A LIST OF DELEGATES

AMCHAM KENYA

Tom Onyango, Board Member - Tripleoklaw Advocates

James Rigassio, Board Member - U.S. Commercial Service, U.S. Embassy Kenya

Maxwell Okello, Chief Executive Officer

Rhodah Mwangi - Communications Lead

Michael Mutiga, Member - Citibank

Brenda Mbathi, Member - GE

Peter Kabui Wairegi, Member - Kenya Property Realtors Association

Rose Musau, Member - Preferred Personnel Africa

GOVERNMENT OF KENYA

Amb. Dr. Monica Juma - Cabinet Secretary, Ministry of Foreign Affairs

Ngatia Kirungie – Consultant Representative, Ministry of Transport, Infrastructure, Housing and Urban Development

Dr. Chris Kiptoo - Principal Secretary, State Department for Trade

Betty Maina - Principal Secretary, State Department of Investment and Industry

Prof. Hamadi Boga - Principal Secretary, State Department for Agriculture and Research

GOVERNMENT OF KENYA AGENCIES

Export Promotion Council

Brand Kenya

KENYAN PRIVATE SECTOR

Kenya National Chamber of Commerce and Industry

Kenya Private Sector Alliance

APPENDIX B LIST OF SPEAKERS

NEW YORK

Plenary

- 1. Amb. Dr. Monica Juma Cabinet Secretary, Ministry of Foreign Affairs
- 2. Amb. Njeru Githae Kenya Ambassador to the United States
- Joel Szabat Deputy Assistant Secretary (DAS) for Aviation and International Affairs,
 U.S. Department of Transportation
- 4. Betty Maina Principal Secretary, State Department of Investment and Industry
- 5. Florie Lizer President, Corporate Council on Africa
- 6. Carole Kariuki Chair, Kenya Private Sector Alliance
- 7. Kiprono Kittony Chair, Kenya National Chamber of Commerce and Industry
- 8. Maxwell Okello Chief Executive Officer, AmCham Kenya

Panel 1

- Betty Maina Principal Secretary, State Department of Investment and Industry, Kenya
- 2. Dr. Chris Kiptoo Principal Secretary, State Department of Trade, Kenya
- 3. Prof. Hamadi Boga Principal Secretary, State Department for Agriculture and Research, Ministry of Agriculture, Kenya
- 4. Ngatia Kirungie Consultant Representative of the Ministry of Transport,
 Infrastructure, Housing and Urban Development
- 5. Moderator: Maxwell Okello Chief Executive Officer, AmCham Kenya

Panel 2

- 1. Mark Lippert Vice President, Boeing International
- 2. Brenda Mbathi Executive Director Govt. Affairs and Policy Eastern Africa, GE
- 3. Peter Karenge Ng'ang'a President, B360
- 4. Rose Musau CEO and Founder, Preferred Personnel Africa

Moderator: Michael Mutiga - Managing Director, Corporate and Investment Banking, Citi Kenya

WASHINGTON DC

Moderators:

- 1. Brionne Dawson Director Africa, U.S. Africa Centre, U.S. Chamber of Commerce
- 2. Maxwell Okello Maxwell Okello Chief Executive Officer, AmCham Kenya

Main Speakers

Kenyan Government

- Betty Maina Principal Secretary, State Department of Investment and Industry, Kenya
- 2. Dr. Chris Kiptoo Principal Secretary, State Department of Trade, Kenya
- 3. Prof. Hamadi Boga Principal Secretary, State Department for Agriculture and Research, Kenya
- 4. Ngatia Kirungie Consultant Representative of the Ministry of Transport, Infrastructure, Housing and Urban Development, Kenya

U.S. Government

- Seward "Skip" Jones Deputy Assistant Secretary for Middle East and Africa, U.S.
 Department of Commerce
- 2. Constance Hamilton Assistant U.S. Trade Representative for Africa
- 3. Rick Angiuoni Office of Policy Analysis and International Relations, U.S. EXIM Bank
- 4. Katrien Hinderdael USTDA Country Manager East Africa Region
- 5. Heba Shams Lead Investment Policy Specialist, World Bank Group

