

Manufacturing Africa:

Mozambique Economic and
Green Manufacturing
Growth Strategy Report and
UK Private Sector
opportunity assessment

Program Governance and Implementation Report

March–April 2026



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We have identified **3 main workstreams** to transform to support achieving Mozambique's economic development ambition...

Program Strategic goal



Unlock short-term FDI opportunities across priority value chains

What the governance model will ensure

- Ensure the right investor is matched to the right opportunity through active deal origination
- Coordinate between APIEX and sector ministries to deliver a seamless investor journey
- Track conversion from investor engagement to committed FDI flows



Attract FDI at scale by focusing on large FDI flagship projects

- Identify and validate the government's top-priority flagship projects with the highest catalytic potential
- Place the right stakeholders on the delivery unit to unblock project preparation and structuring



Improve FDI enabling ecosystem by optimizing engagement between stakeholders

- Implement targeted interventions to close the most critical gaps in the FDI ecosystem
- Clarify and align roles across APIEX, government, bilateral institutions, multilateral institutions, and the private sector



Workstreams

1. Short-term FDI opportunities



2. Large FDI flagship projects



3. FDI enabling Ecosystem

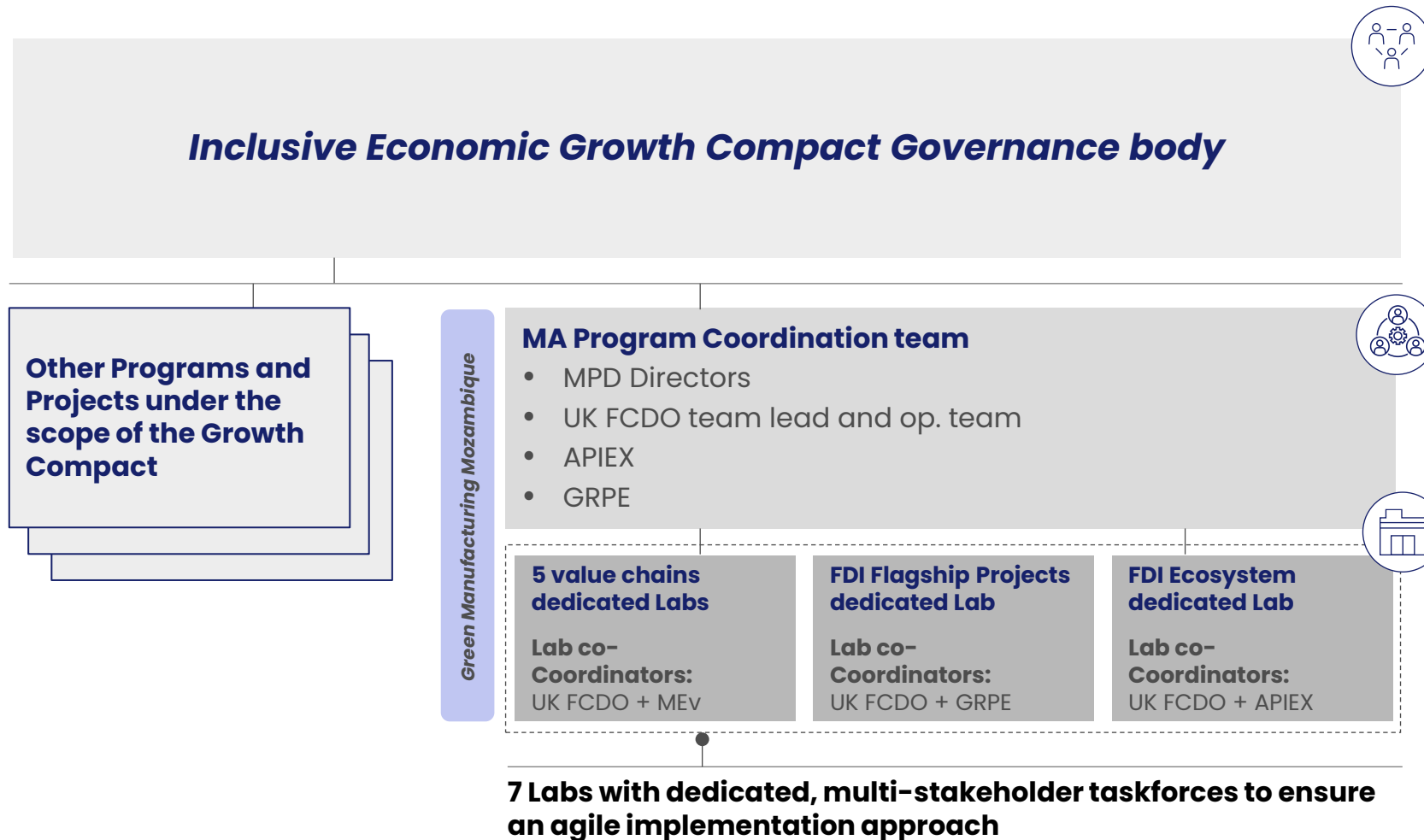


... which will require a governance model and structure to guarantee proper delivery

PRELIMINARY FOR DISCUSSION

Program structure

■ Governance bodies ■ Delivery Lab



Governance structures



IEGC Governance body

Responsible for the executive and strategic decisions across the Inclusive Economic Growth Compact with Executive teams from UK FCDO and Government of Mozambique



MA Program Coordination team

Coordinates day-to-day program delivery across workstreams, ensuring alignment between the Labs and the strategic direction set by the GGC Coordination Office



Delivery Lab

Manages implementation of interventions within each workstream



Workstream initiatives will be delivered through a lab-based model

PRELIMINARY FOR DISCUSSION

Core functions



Strategic prioritisation

Align lab members on a short, prioritised list of actionable initiatives within the workstream scope



Initiative Design

Co-design investor-ready interventions, reforms, and value propositions with public and private actors



Stakeholder coordination

Map roles across the ecosystem and establish clear ownership for each initiative



Implementation planning

Produce actionable implementation plans and unblock regulatory or institutional bottlenecks



Monitoring & Escalation

Track progress, escalate blockers, and capture knowledge to sustain momentum across cycles

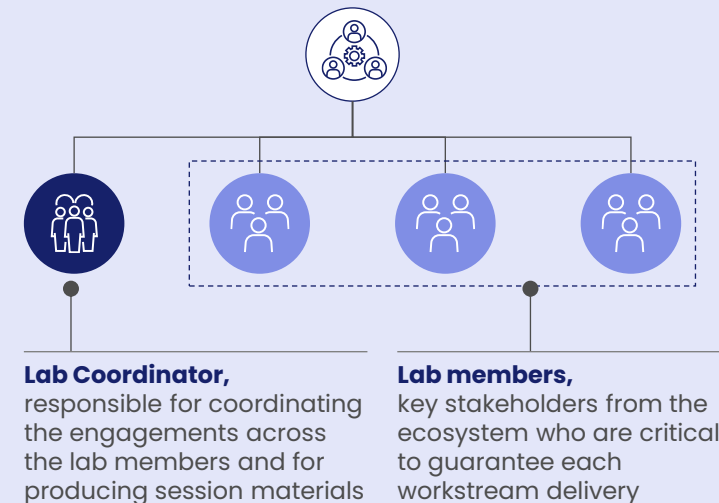


Practical-oriented

Simplify and agile way of working to ensure swift turnaround time on the implementation

Typical structure

Program Coordination Office



Key success factors



Max. 10 people per Lab










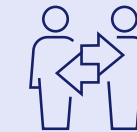
Selected profiles are expected to have recognised seniority in their organisation



To guarantee full implementation, 7 dedicated Labs focused on the strategic development priorities need to be created

PRELIMINARY FOR DISCUSSION

Lab	Workstream	Lab coordinator	Key lab members
 Cotton	1. Short-term FDI opportunities	UK FCDO	DNIEC ¹ , DASP ² , DNI ³ , IAOM, AT, APIEX, CTA, IFC/WorldBank, GiZ, JFS
 Edible oils		UK FCDO	DNIEC ¹ , DASP ² , DNI ³ , IAOM, AT, APIEX, CTA, IFC/WorldBank, GiZ
 Rice		UK FCDO	DNIEC ¹ , DASP ² , DNI ³ , DNA, DNCE ⁴ , ICM, AT, APIEX, CTA, IFC/WorldBank, GiZ
 Cashew		UK FCDO	DNIEC ¹ , DASP ² , DNI ³ , DNCE ⁴ , IAM, AT, APIEX, CTA, IFC/WorldBank, GiZ, Permanuts
 Tourism		UK FCDO	DNIEC ¹ , DASP ² , DNI ³ , AT, APIEX, CTA, IFC/WorldBank, GiZ
 Flagship opportunities	2. Large FDI flagship projects	UK FCDO	DNIEC ¹ , GRPE, APIEX, AT, IFC/WorldBank, GiZ
 FDI Ecosystem	3. FDI enabling Ecosystem	UK FCDO	DNIEC ¹ , DASP ² , DNCI, GRPE, APIEX, AIMO, CTA



Depending on each Lab's scope, some participants may sit on multiple Labs to optimise use of limited resources

1. Direcção Nacional de Investimentos Estratégicos e Cooperação
2. Direcção Nacional de Apoio ao Sector Privado
3. Direcção Nacional de Indústria
4. Direcção Nacional de Comércio Externo



The Program Coordination Office will ensure operational alignment between the Labs and overarching governance

PRELIMINARY FOR DISCUSSION

Dimension

Description



Objectives

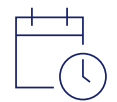
- Coordinate day-to-day program delivery across all workstreams, ensuring Labs are progressing against agreed milestones
- Act as the primary operational interface between the Overarching TO and the 7 Labs – translating strategic direction into actionable priorities at workstream level
- Ensure cross-workstream dependencies are managed and that no initiative falls between institutional mandates



Participants

- **MPD Directors** – provide government-side coordination and ensure national policy alignment across workstreams and Labs
- **UK FCDO Team Lead and Op. Team** – manage program delivery coordination, prepare materials, and track Lab-level progress
- **APIEX** – ensures investor facilitation and deal support activities are aligned across value chain Labs
- **GRPE / TBI (TBD)** – provides program delivery and technical advisory support to the coordination function

Note: Lab Co-Coordinators may be invited to present workstream-specific updates or escalations depending on the agenda



Meeting cadence

- Convenes **1x/month for a 2-hour working session**
- **Agenda prepared jointly by the UK FCDO Team Lead and MPD teams** at least 3 days in advance



Materials to be prepared for SteerCo

- Consolidated workstream progress update with color-coding rating per Lab
- Summary of cross-Lab dependencies, blockers, and proposed resolution actions
- Updated forward workplan covering the next coordination cycle, with owner assignments per initiative



Key next steps

- 1 Formally confirm membership and roles within the Program Coordination Office
- 2 Schedule the first monthly coordination session and lock recurring dates in all participants' calendars
- 3 Map critical institutions per workstream (APIEX, ministries, DFIs, private sector)
- 4 Select and formally invite, members to establish the lab
- 5 Reach out to priority investors through embassies, attachés, and existing networks
- 6 Organize targeted investor delegations and site visits aligned with each workstream's opportunities




MPD will be key to guide strategic direction, coordinate efforts and provide technical input across the governance structures

PRELIMINARY



MPD's participation in the program will span multiple levels across the ministry, with varying degrees of engagement required at each level



Governance structure	Rank	MPD Role	Level of participation required
 IEGC overarching coordination office	<ul style="list-style-type: none"> Minister DNIEC Director, upon ad-hoc clarification requests 	<ul style="list-style-type: none"> Provide strategic direction and final decisions on program priorities, ensuring that IEGC objectives and government requirements are fully reflected 	<ul style="list-style-type: none"> 1x annual 2-hour gathering at Presidential level, plus quarterly 2-hour sessions at Executive level
 MA Program Coordination team	<ul style="list-style-type: none"> DNIEC Director 	<ul style="list-style-type: none"> Jointly lead coordination of the program and mobilise participation from relevant government institutions and stakeholders 	<ul style="list-style-type: none"> 1x monthly 2hr session DNIEC teams and other MPD teams will work with the UK FCDO to jointly develop and prepare the meeting documentation
 Delivery Labs	<ul style="list-style-type: none"> DNIEC team members + other MPD Directions teams, i.e., DNPED¹ 	<ul style="list-style-type: none"> Contribute technical expertise, validate analytical outputs, and support review of key issues and proposals discussed in the Labs 	<ul style="list-style-type: none"> Bi-monthly sessions of 2 hours

1. Direcção Nacional de Políticas Económicas e Desenvolvimento

Facilitating the program would require ~\$35K to host meetings across the various office and labs

Illustrative quarterly meeting cadence

PRELIMINARY



Engagement cadence	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
IEGC Governance body	<i>To be defined</i>											
MA Program Coordination team				In-person				In-person				In-person
Value chain dedicated labs		Virtual		In-person		Virtual		In-person		Virtual		In-person
FDI Flagship projects lab		Virtual		In-person		Virtual		In-person		Virtual		In-person
FDI ecosystem lab		Virtual		In-person		Virtual		In-person		Virtual		In-person

Delivery Labs


~\$25K

annual program cost¹
including the logistics of hosting the meetings across the different workstreams and offices

1. Assumes meeting room booking rates from Radisson Blu Mozambique venue


We have identified 48 initiatives across the priority value chains to be driven by the corresponding delivery labs... (1/4)

PRELIMINARY NON-EXHAUSTIVE

Workstream	Initiative	Responsible Lab				
 <p>1. Short-term FDI opportunities</p>	1 Review import tariffs on crude edible oil to encourage domestic processing	Edible Oils VC Lab				
	2 Enforce domestic processing requirements for soybean exports and imports		Edible Oils VC Lab			
	3 Establish a dedicated, project-specific fast-track lane at ports for exports and imports			Edible Oils VC Lab		
	4 Review the tax regime for customs duties on extraction/crushing inputs and machinery				Edible Oils VC Lab	
	5 Guarantee a dedicated discounted tariff for the SEZ below USD 0.08/kWh					Edible Oils VC Lab
	6 Review and align minimum wage structures for textile and garment manufacturing to ensure competitiveness	Cotton VC Lab				
	7 Mobilise donor and bilateral TA partnerships (e.g., Portugal, ICAC) to drive productivity		Cotton VC Lab			
	8 Establish a dedicated, project-specific fast-track lane at ports for exports and imports			Cotton VC Lab		
	9 Complete the Chimuará–Nacala power transmission project to extend the 400 kV/220 kV line and new substations all the way to Nacala				Cotton VC Lab	
	10 Guarantee a dedicated discounted tariff for the SEZ below USD 0.08/kWh					Cotton VC Lab
	11 Grant long-term, investment-linked land-use rights in the relevant SEZ					


We have identified 48 initiatives across the priority value chains to be driven by the corresponding delivery labs... (2/4)

PRELIMINARY NON-EXHAUSTIVE

Workstream	Initiative	Responsible Lab		
 <p>1. Short-term FDI opportunities</p>	12 Guarantee timely and sufficient supply of preferred basic seed per season	<p>Rice VC Lab</p>		
	13 Establish a fast-track registration and domestic production approval for new rice seed varieties		14 Establish a dedicated fast-track lane for rice seed certification for integrated rice players	
	15 Guarantee application of that customs duties and VAT exemption for rice production inputs and machinery (e.g., irrigation)		16 Guarantee application of reduced corporate tax	
	17 Guarantee application of accelerated depreciation benefit		18 Grant long-term, investment-linked access and operating rights to the 50 ktpa Zambézia rice milling facility	
	19 Grant long-term, investment-linked access to 2,600 ha of irrigated agricultural land near the Zambézia rice milling facility		20 Negotiate a reduced water tariff for agribusiness for ~25 years to improve irrigated rice economics	
	21 Commit to rehabilitating and upgrading water-delivery infrastructure to ensure reliable water access for milling and production areas		22 Establish an exclusive RCN procurement window for domestic primary processors	<p>Cashew VC Lab</p>
	23 Organize dedicated procurement fairs to improve access to high-quality RCN		24 Enforce application of increased tax levy on non-processed cashew	
	25 Appoint a partner financial institution to manage cashew-sector financing mechanisms			

We have identified 48 initiatives across the priority value chains to be driven by the corresponding delivery labs... (3/4)

PRELIMINARY NON-EXHAUSTIVE

Workstream	Initiative	Responsible Lab
 <p>1. Short-term FDI opportunities</p>	26 Set up a cashew industrial loan-guarantee fund financed by earmarked levy revenues	Cashew VC Lab
	27 Launch dedicated cashew industrial credit lines at preferential interest rates	
	28 Guarantee application of customs duties and VAT exemption	
	29 Guarantee application of reduced corporate tax for cashew industrials	
	30 Guarantee application of accelerated depreciation benefit for cashew industrials	
	31 Grant long-term, investment-linked land-use rights in the relevant SEZ	
	32 Create a unified digital tourism platform to streamline tourism investment approvals	Tourism Lab
	33 Establish hospitality and tourism vocational training centres in priority regions	
	34 Create sustainable financing mechanisms for protected areas	
	35 Expand visa waiver eligibility and launch awareness campaigns to secure tourist demand	
	36 Scale delegated co-management PPP models across priority conservation areas	
	37 Establish long-term concession frameworks for tourism assets	

We have identified 48 initiatives across the priority value chains to be driven by the corresponding delivery labs... (4/4)

PRELIMINARY

Workstream

Initiative

Responsible Lab

1. Short-term FDI opportunities



- 38 Identify and engage target investors through embassies and commercial attaches
- 39 Establish a dedicated investor taskforce to coordinate outreach and investor engagement
- 40 Organise a targeted investor delegations and site visits
- 41 Engage DFIs and blended finance partners to de-risk investment

All VC Labs

2. Large FDI flagship projects




- 42 Secure executive alignment and national sponsorship for priority flagship opportunities
- 43 Develop a gas-based industrialisation masterplan
- 44 Develop dedicated strategic roadmaps for the other flagship opportunities
- 45 Define a project-specific government offer for each flagship opportunity
- 46 Map target investors and launch structured engagement with investors and industry experts
- 47 Secure international knowledge and credibility partnerships
- 48 Organise targeted sector deal rooms, investor roundtables, and value-chain forums

Large FDI Lab

... supported by 13 cross-cutting interventions to enhance the FDI enabling ecosystem and drive implementation

PRELIMINARY

Priority initiatives

Workstream	Intervention	Description	Responsible Lab
 <p>3. FDI enabling Ecosystem</p>	1 APIEX elevation to Autonomous Investment Authority	APIEX elevated to autonomous national authority for FDI, reporting to top executive office with a mandate to enable and execute priority investments, and enabled by budgetary independence and best-in class talent experienced in investment promotion	Ecosystem VC Lab
	2 Sectoral Wide Approach (SWAp) Division of Labour Framework	Role allocation model, aligned with stakeholders, defining responsibilities and priorities by value chain, and meeting cadence to align across ecosystem	
	3 Private Sector Representation Strengthening program	Capability building and mapping of sector players, increase reach of representation, and effectiveness of advocacy in PPD by private sector groups	
	4 Annual competitiveness & investment climate review	Action-oriented annual review benchmarking regulatory performance and reform progress, translating diagnostics into targeted recommendations	
	5 Integrated Set-up & Regulatory compliance one-stop shop	End-to-end digital platform integrating registration, licensing, regulatory approvals & compliance, and payments into a single interface	
	6 Regional Investment Delivery & ownership program	Strengthened regional APIEX branches with clear attraction, facilitation, and aftercare mandates tied to measurable development targets	
	7 Strategic investor lifecycle management program	Dedicated relationship managers assigned to priority investors to support attraction, delivery, aftercare & retention, and reinvestment	
	8 Investment pipeline & delivery management system	centralised digital dashboard tracking priority projects, approvals, and bottlenecks in real time to enable proactive intervention and coordination	
	9 National FDI & Economic development monitoring system	Standardized KPI and SLA architecture linking sector strategies to institutional mandates, with clear accountability and ecosystem wide performance tracking	
	10 Delivery & rapid reform steering team	Time-bound, sector-focused reform labs bringing decision-makers and private sector actors together to unblock operational barriers and deliver solutions	
	11 Foreign mission investment promotion program	Foreign missions formally mandated and equipped to target priority sectors and markets, coordinating investor outreach and pipeline with APIEX	
	12 Mozambique Investment summit	High-level investment forum structured around fast-track and bankable opportunities, designed to drive deal conversion and investor matchmaking	
	13 Mozambique Bankable Projects & Digital data room platform	Live pipeline of investment-ready projects supported by a secure digital data room with financial, regulatory, and technical documentation for due diligence	

1. APIEX elevation to Autonomous Investment Authority

Selected intervention deep-dive

NON-EXHAUSTIVE

Milestone/Activity	Key stakeholders
1 Conduct a go & see visit to RDB to understand their autonomous authority model, governance structure, and One-Stop Centre operations	APIEX leadership, UK FCDO, MPD, GRPE, DFIs
2 Run a gap assessment of APIEX against IPA best practices covering dimensions like mandate, autonomy, talent, and budget independence	APIEX, ME, UK FCDO, AIMO, CTA, DFIs, GRPE
3 Stakeholder consultation with private sector, ministries, and DFIs to validate priority gaps and build political buy-in for reform	MPD, ME, Private sector associations, multilateral and bilateral donors, UK FCDO
4 Develop an institutional reform roadmap – define the legislative changes needed to grant APIEX autonomous authority and direct reporting to the Executive	APIEX, MPD, ME, UK FCDO
5 Design a new governance model – including a Board of Directors with private sector representation, a CEO mandate, and accountability mechanisms	APIEX, MPD, ME, UK FCDO
6 Develop a talent and capability plan – map skills gaps and design a recruitment and retention strategy for investment promotion specialists	APIEX, MPD, ME, UK FCDO
7 Launch a One-Stop Centre (OSC) design – integrating business registration, visa facilitation, investment incentives management and investor aftercare	APIEX, MPD, ME, UK FCDO, Private Sector associations and relevant ministries
8 Pilot the new operating model with 3 flagship investor cases to test responsiveness, service quality, and cross-ministry coordination	APIEX, Pilot investors, MPD, ME and relevant ministries
9 Official launch and communication of the elevated APIEX – investor-facing brand, new website, mandate communication to diplomatic missions	APIEX, Ministry of Foreign Affairs, Embassies, Bilaterals, ME, MPD, UK FCDO

2. Sectoral Wide Approach (SWAp) Division of Labour Framework

Selected intervention deep-dive

NON-EXHAUSTIVE

Milestone/Activity

Key stakeholders

1	Map the current ecosystem landscape – document all institutions active in FDI and economic development, their mandates, activities, current engagement with value chains, and areas of overlap or gap	APIEX, MPD, bilateral institutions, multilateral institutions, private sector associations
2	Conduct stakeholder interviews – engage each ecosystem actor individually to surface coordination failures, mandate tensions, and unmet needs across value chains	MPD, APIEX, bilaterals, multilaterals, private sector associations
3	Convene a strategic alignment workshop – bring all ecosystem actors together to agree on the priority value chains for the country and build a shared view of the development agenda	All ecosystem stakeholders, MPD (chair), UK FCDO (facilitator)
4	Align on priority value chains – formally validate the short list of value chains that will anchor the SWAp, with documented consensus from all parties	MPD, APIEX, private sector associations, bilateral and multilateral partners
5	Define the role allocation framework by value chain – create a dedicated lab per priority value chain, based on mandate, capacity, and comparative advantage	MPD, APIEX, GRPE, UK FCDO
6	Validate the framework in a co-design workshop – present the draft role allocation to all ecosystem stakeholders, incorporate feedback, and secure collective sign-off	All ecosystem actors, MPD (decision authority), UK FCDO (facilitator)
7	Design the SWAp coordination cadence – establish a regular meeting rhythm and shared reporting structure to maintain alignment across value chains as implementation progresses	APIEX, Lab Owners, UK FCDO
8	Integrate SWAp performance reporting into program governance – ensure coordination effectiveness is tracked and escalated at SteerCo level on a quarterly basis	UK FCDO, MPD

3. Private Sector Representation Strengthening program

Selected intervention deep-dive

NON-EXHAUSTIVE

Milestone/Activity	Key stakeholders
1 Map existing private sector associations – assess their reach, membership, sectoral coverage, and current capacity to advocate in PPD processes	MPD, APIEX, private sector associations (CTA, CCI, AIMO), UK FCDO, bilaterals
2 Conduct a capability gap assessment of the most relevant associations – scoring them on advocacy skills, technical capacity, and PPD effectiveness	UK FCDO, MPD, bilaterals
3 Design a tailored capacity building program – covering policy analysis, evidence-based advocacy, and engagement techniques for PPD processes	UK FCDO, training partners, multilaterals, MPD
4 Establish a formal PPD mechanism – define structure, agenda-setting process, decision-making rules, and follow-up accountability for public-private dialogue (i.e., revamp current PPD PSWG)	MPD, current Private Sector Working Group members and additional Private Sector members
5 Develop a private sector intelligence function – enable associations to produce investment climate reports and position papers that inform government policy	Private sector associations, UK FCDO
6 Institutionalize the revamped PPD with a formal charter and co-signed by government and private sector – giving it permanence beyond the program cycle	MPD, Ministry of Justice, Private sector associations
7 Establish a monitoring and evaluation framework for the program – tracking reach of representation, quality of advocacy outputs, and PPD outcomes	UK FCDO, private sector associations, MPD

5. Integrated Set-up & Regulatory compliance one-stop shop

Selected intervention deep-dive

NON-EXHAUSTIVE

Milestone/Activity	Key stakeholders
<p>1 Map the current investor set-up journey – document the full approval pathway across business registration, investment approval, licensing, tax/customs onboarding, land access, utilities, immigration, environmental approvals, and sector-specific permits</p>	<p>APIEX, MPD, relevant sector ministries, AT, CTA, AIMO, UK FCDO</p>
<p>2 Prioritise the minimum viable service scope – identify the first set of investor services to be integrated into the one-stop shop based on pain points and conversion impact</p>	<p>APIEX, MPD, relevant sector ministries, AT, CTA, AIMO, bilaterals, multilaterals, UK FCDO</p>
<p>3 Define the target-state service catalogue and SLAs – agree which institution owns each step, the required documentation and expected turnaround times</p>	<p>APIEX, MPD, relevant sector ministries, AT, GRPE, UK FCDO</p>
<p>4 Design the one-stop shop operating model – create an APIEX-led case-management model with designated ministry focal points and clear escalation pathways</p>	<p>APIEX, MPD, relevant sector ministries, AT, GRPE, UK FCDO</p>
<p>5 Specify the digital platform and interoperability requirements – define the investor portal, document workflows, payment functionality, tracking dashboard, and the interfaces needed with existing public systems used</p>	<p>APIEX, MPD, relevant sector ministries, AT, GRPE, UK FCDO</p>
<p>6 Pilot the redesigned journey on priority investor cases – test the end-to-end process with a small set of live investors in priority value chains, validate turnaround improvements</p>	<p>APIEX, MPD, relevant sector ministries, AT, CTA, AIMO, bilaterals, multilaterals, UK FCDO</p>
<p>7 Formalise the institutional and legal arrangements – secure the inter-agency agreements, mandate clarifications, data-sharing protocols, staffing model, and governance mechanisms</p>	<p>APIEX, MPD, relevant sector ministries, AT, CTA, AIMO, bilaterals, multilaterals, UK FCDO</p>
<p>8 Launch phased rollout and embed performance tracking – expand the one-stop shop by process and sector, publish service standards, and track approval time, backlog, investor satisfaction, and escalations through the broader program governance rhythm</p>	<p>APIEX, MPD, relevant sector ministries, AT, CTA, AIMO, bilaterals, multilaterals, UK FCDO</p>

6. Strategic Investor Lifecycle Management program

Selected intervention deep-dive

NON-EXHAUSTIVE

Milestone/Activity	Key stakeholders
1 Benchmark best-practice ILM models – study how leading IPAs (RDB, IDA Ireland, CINDE Costa Rica) assign relationship managers and track investor journeys	APIEX, UK FCDO, ME, GRPE
2 Segment the priority investor base – define tiers of strategic investors by value chain, investment size, and lifecycle stage (prospecting, active, retained)	APIEX, MPD, Multilaterals, UK FCDO, ME, GRPE
3 Design the Relationship Manager (RM) model – define roles, responsibilities, coverage ratios, and performance metrics for dedicated RMs per investor tier	APIEX, UK FCDO, ME, GRPE
4 Recruit and onboard RMs – hire or redeploy qualified investment professionals with sector expertise aligned to priority value chains	APIEX, UK FCDO, ME
5 Develop an investor CRM system – implement a digital platform to track investor interactions, pipeline stages, blockers, and relationship health across the lifecycle	APIEX, UK FCDO, ME
6 Design standard service protocols for each lifecycle stage – attraction, facilitation, delivery, aftercare, and reinvestment – with clear response times and deliverables	APIEX, UK FCDO, ME
7 Activate diplomatic channels – brief embassies and commercial attachés on the RM model and equip them to identify and hand over qualified investor leads	APIEX, Ministry of Foreign Affairs, Embassies, Bilaterals, ME, MPD, UK FCDO
8 Run a pilot with 10 priority investors across 2 value chains – testing the full lifecycle service model from initial outreach to post-investment aftercare	APIEX RMs, UK FCDO, relevant ministries
9 Establish an investor feedback loop – structured mechanism to capture investor experience at each lifecycle stage and feed improvements back into the system	APIEX, MPD, ME, Private Sector
10 Integrate the ILM into APIEX's core operating model – embed RMs into the institutional structure with formal KPIs tied to FDI attraction, retention, and reinvestment	APIEX, MPD, ME, Private Sector