

The Role of the Estonian Private Sector in Development Cooperation

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List of Abbreviations

CSO	Civil Society Organisation
ESD	Estonian School of Diplomacy
FDI	Foreign Direct Investment
HCEDC	Harju County Entrepreneurship and Development Consultancy
HLF4	4th High Level Forum on Aid Effectiveness
MFA	Ministry of Foreign Affairs

1. Introduction

This policy brief analyses and defines the current role of the Estonian private sector as a development actor. The role of the state and civil society organisations (CSOs) in Estonian development assistance has been quite well documented to date. However, the role of an increasingly important sector – the private sector – has so far been overlooked. This policy brief aims to fill that gap. In doing so, it will examine the different roles of the private sector in development cooperation, what activities the private sector is undertaking and provide a brief assessment of the effectiveness of the private sector in development cooperation. Furthermore, recommendations will provide ways to increase the engagement of the private sector in development cooperation.

Here, the private sector is defined as formal businesses and represented by for-profit companies (including banks, investment funds, private insurance companies, and private educational establishments). The research will also include the business and employers associations as organised representatives of the private sector companies.

The relationship between the private sector and development assistance is complex. The private sector includes sole proprietors, SMEs, large companies and MNCs not controlled by the state, which have the potential to contribute through direct channels of development assistance (e.g. employment and income, infrastructure, goods and services) and through indirect channels of development assistance (e.g. economy, tax, policy and governance). One of the main objectives of the Fourth High Level Forum on Aid Effectiveness (HLF4), held in Busan in 2011, was to ‘enlarge the tent’ and change the development assistance architecture by bringing in the private sector as a partner on equal terms as CSOs and other actors. Furthermore, Article 32 stipulates the “central role of the private sector in advancing innovation, creating wealth, income and jobs, mobilising domestic resources and in turn contributing to poverty reduction”.¹

The role of the private sector is quite different to that of the state or CSOs. Unencumbered by strict state regulations, the companies operate more along the lines of arm’s length transactions and profit maximisation. These market-directed strategies would seem to be somewhat unaligned with welfare improvement. As such, the private sector’s potential impact is far greater than that of the state or CSOs, although the question arises as to whether they have fulfilled this potential and if not, why?

This policy brief is based on the findings of research on the role of the private sector in development effectiveness as part of the project activities within the framework of the European Commission project entitled: *Update of the current status of implementation of international/bilateral trade regimes with ODA recipients and the current role of civil society and private sectors as development actors in the new EU Member states*.

1.1. Methodology

This policy brief will analyse the abovementioned issues, using the findings from an online survey sent to Estonian private companies which do business with developing countries, semi-structured interviews with those active in the field of development assistance, as well as desk research based on secondary data from reports and other sources about development cooperation.

¹ http://www.undp.org/content/dam/uspc/docs/OUTCOME_DOCUMENT_FINAL_EN.pdf

An online survey was run between November and December 2012. Respondents were chosen based on direct invitations and public announcements made through mailing lists. A total of 9 responses were garnered, which although low is within the norms for contacting the private sector with requests for information. Therefore, the results cannot be interpreted as being representative for the private sector, but rather is indicative of the individual trends that have been occurring. This would also seem to highlight that the private sector's knowledge of development assistance is low, as most companies which received the questionnaire stated that this topic does not concern them despite their activities being closely related to development assistance.

In-depth interviews were held with representatives of various private sector companies which do business in developing countries as well as public sector representatives (see appendix 1).

The focus of this policy brief will be on the Estonian private sector in relation to Estonia's priority development assistance countries (Afghanistan, Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine), although examples from other recipient countries will also be given.

This policy brief is organised as follows: the next section will focus on the role of the Estonian private sector in development assistance, focusing on different channels through which assistance is given. This is followed by a section dealing with the private sector's participation in development assistance. Thereafter, the participation of different kinds of private sector representatives in development aid will be addressed. The final section concludes, recapping the major issues and providing policy recommendations.

2. The Role of the Private Sector in Development Assistance

Although the MFA development cooperation database² does not record all private sector involvement in development assistance, nonetheless the total value of development cooperation projects undertaken by Estonian companies rose from over €21,000 in 2006 to over €169,000 by 2012, indicating the potential role the private sector can play in development assistance.

The breadth of activities in which the private sector operates is far wider than the state or CSOs. Below are examples of development supporting activities across different channels. This is by no means an exhaustive list, but rather it is indicative of the various activities that the private sector is currently undertaking.

2.1. Trade

Estonian trade with priority countries and developing countries has been steadily growing in the past few years. Estonian businesses have sought to expand outside Estonia through building up trade networks.

One good example of development assistance trade is with the wine sector. Many developing countries (and especially Estonia's priority countries) specialise in cultivating grapes and making wine. The Gurjaani Wine Cellar Aguna³ based in Gurjaani, Georgia is owned by Estonians. Much wine is sold on the local market and also exported to Estonia. This company supports local development through offering jobs to the local population. Estonia imports much wine from developing countries such as Chile (€7.2 million in 2012, the 4th largest country of imports) and South Africa (€2.6 million in 2012, the 5th largest country of imports). Indeed, one Estonian IT developer has set up a successful company importing wines from South Africa and selling them on in Estonia as well as through a network in Latvia and Lithuania.

Despite this increased trade, from a development assistance perspective, companies are still yet to understand fully the impact they can have, that their actions could be considered support for development assistance. Consequently, much business is still conducted with more emphasis on profit maximisation and less on the good will to support the development there. Insufficient promotion and information that trade can be a mechanism of development assistance could be the reason why entrepreneurs in priority countries and other developing countries have not undertaken more development supporting trade. Furthermore, Estonian companies do relatively little trade with African and Asian countries, which are still considered to be markets for their products and services and also an area for supply of raw materials. Consequently, the inclusion of development assistance is nearly non-existent in these regions.

² https://rakendused.vm.ee/akta/andmed_otsing.php

³ <http://www.agunawine.ge>

2.2. Direct Investment

Many of Estonia's most prominent business people have invested abroad through their investment companies, especially in the Caucasus region. However, as with trade, the investments are usually made with an aim of gaining a profit rather than supporting development assistance. Furthermore, the volumes of investments are not significant. The largest Estonian investments go into real estate, professional, scientific and technical activities, and wholesale and retail trade. These trends are reflected in the FDI statistics.

Private investments in the developing countries are still fraught with difficulties due to political instability and risky investment climate in the developing countries. One survey respondent mentioned that he had planned to invest in Ukraine, although after witnessing the losses other Estonian investors had, he decided to invest in Georgia instead. Unfortunately, the war with Russia broke out, so he then decided to invest in Moldova, although the economic climate there is not stable and the potential risks are very high. He pointed out that he would feel safer with his investments if the Estonian government was more influential in these countries and could guarantee to safeguard or return his investments in case of any political or economic turmoil.

The lack of direct investments is in many cases also due to little knowledge of foreign markets and business climate in the priority countries and other developing countries. Nevertheless, many Estonian companies have pointed out that they would be willing to invest more if there would be more know-how and some supporting agency which would help them to invest and monitor the business climate and markets, however such a mechanism is not present today.

2.3. Transfer of know-how, technology and good practices

The transfer of know-how and good practices is a stated aim at state level – to contribute to the reform of the partner countries, using Estonia's own experience. At private sector level, the transfer of know-how and good practices usually occurs through arm's length trade as well as direct investments, although not as an explicit action. However, some companies are involved specifically with the aim of passing on best practice to Estonia's partner countries. For example, the Harju County Entrepreneurship and Development Consultancy (HCEDC)⁴, an institution whose goal is to initiate and implement projects aimed at contributing to the local development in Harju county (Estonia has 15 counties altogether), is trying to build up civil society in Georgia through offering the same type of consultancy services. As such, since 2010 it has received around €50,000 annually from the Ministry of Foreign Affairs (MFA) for implementing the distribution of Estonian enterprising experience and support of start-up businesses. During the 2008 Russia-Georgia war, HCEDC changed its focus to concentrating on those in refugee camps by providing them know-how on how best to start their own company. The aim was to help these people out of these camps and poverty, to give them back their self-confidence and a future.

2.4. Building of physical infrastructure

The building of physical infrastructure is something that is usually regarded as being the preserve of the state rather than the private sector. Defendec⁵ has been building up a border guard control

⁴ <http://www.heak.ee>

⁵ <http://www.defendec.com>

system in Georgia for detecting intruders in green spaces such as forests. This project came about with the help of lobbyists, who actively championed such activities as being in the interest of the country there. With the help of the MFA, in 2010 Defendec also deployed its system in Ukraine, to guard the green border and prevent the illegal movement of persons and goods over the Ukrainian-Moldovan border. In the framework of that project, the border guard officials of Moldova and Ukraine were trained on the issues of adhering to the European Union, NATO and Schengen visa area.

The contribution of Estonian companies in building up infrastructure is not confined to state projects, but also to private companies. For example, Net Group⁶, an IT company providing business solutions, is building a system for one of Ukraine's major oil companies to monitor their infrastructure and other gas related data.

2.5. Building of human capital

The building of human capital (such as the training of farmers, teachers, health personnel and social dialogue) is considered one of the most important elements of state development assistance. As such, it is mostly undertaken by the state and CSOs, crowding out the need from the private sector. In the short term this activity offers more intangible rewards rather than immediate financial reward, which means that many companies only undertake it connected to long term investments. Therefore, the companies which have undertaken training in relation to development assistance are usually those specialise specifically in that field. Examples of private companies which assist in building up human capital include Miksike OÜ⁷, a private education initiative, which since 2011 has run an online learning environment in Crimean schools in Ukraine. Professionals from the Crimean Teacher Training Institute (KRIPPO) are involved in teacher training, being taught to use information and communications technology both in classroom instruction and in organising schoolchildren's independent studies. The broader goal of the project is to support achievement of the goals of the UNESCO Education for All program and the goals set in the Ukrainian information society development plan 2007-2015, which call for students to be given an opportunity to acquire ICT knowledge and skills concurrently with the learning process.

Other companies have focused on transferring the Estonian experience to other countries. In 2008 Invent Baltics OÜ⁸, an innovation consulting company, ran a series of trainings, seminars and study trips in Georgia for civil servants, representatives of R&D institutions and private companies to share the Estonian experience of establishing innovation support structures and making the technology transfer function. Equally, in 2008 Tallinn Development and Training Center⁹ undertook a training programme in Moldova, Georgia and Ukraine on e-governance and digital local agenda, best practices of Tallinn and e-Estonia.

Utilising experiences from the Estonian school computerisation programme 'Tiger Leap', the E-governance Academy (although a CSO, the Academy involved private companies in its work) is involved in elaborating digital study materials, establishing sustainable training systems of teachers,

⁶ <http://www.netgroup.ee>

⁷ <http://www.miksike.ee>

⁸ <http://www.invent.ee>

⁹ <http://www.takk.ee>

integrating ICT into the curricula, and monitoring the Georgian Deer Leap programme (the Georgian equivalent to the Estonian Tiger Leap).¹⁰

The building of human capital has also involved infrastructural projects. In 2007 a project was prepared in co-operation between the private limited company Aquatilis, Põlva County Government, the foundation of the Ida-Viru Enterprise Centre and AS Viimsi Vesi. The objective was to arrange project management training for the employees of Kulikovka region of Chernigov oblast, Ukraine. In the framework of the project officials of Kulikovka region were also consulted about the modernisation of their water and sewerage system as well as about the implementation of the development project.

Starting from 2011 the Estonian Center of Eastern Partnership¹¹ (a CSO, which operates along business lines) started to operate in Tallinn. Based on the experiences of the Estonian School of Diplomacy (ESD), the training centre has been created for arranging training programs and seminars related to various aspects of good governance reform to the government officials from EU Eastern Partnership countries. An important aspect of the work of the centre is enhancing the regional cooperation and integration of the Eastern Partnership countries. The activities of the centre are funded from the MFA development cooperation budget.

2.6. Healthcare

Estonian private healthcare companies have not been too active in development cooperation, as these activities are usually undertaken by state institutions or CSOs. One exception is AS Chemi-Pharm¹², a pharmaceutical company specialising in producing disinfecting agents, cleaning and maintenance products and natural cosmetics, which targets its main exports at Russia, the ex-Soviet countries and Asian countries (e.g. Malaysia, Indonesia, Saudi Arabia, Turkey). In particular, it is involved with the least developed hospitals and medical institutions in Asian countries, as the tropical weather combined with a relative lack of tidiness and sterility contribute to more prevalent infection and mortality rates there. Through the export of its products, as well as greater education in the need for sterile conditions at the workplace, Chemi-Pharm contributes to combating the spread of infectious diseases and to increasing the health and well-being of the people in these countries.

Another company, Amhold AS¹³, is helping design and build a network of medical laboratories for six hospitals in Uganda. At a cost of US\$87 million, local engineers from a partner firm in Uganda, engineering companies from Estonia, scientists from the University of Tartu, specialists from international organisations as well as local experienced medical staff are involved in the project. The laboratories, including bacteriology and AIDS laboratories, will serve the everyday need of doing analyses in hospitals, as well as educational and scientific purpose. The project contributes to transforming the lives of 28 million people across the country into a more secure and healthier direction.

¹⁰ <http://www.dlf.ge>

¹¹ <http://www.eceap.eu>

¹² <http://www.chemi-pharm.com>

¹³ <http://www.amhold.ee>

2.7. Education

There are some private institutions which undertake educational activities aimed at development assistance. It has been said that as Estonia cannot offer as much development assistance funding to recipient countries as other developed countries, it has focused on training and information through other educational methods instead. As such, education plays an important part of Estonia's development assistance.

Perhaps the most important education organisation aimed at development assistance is the ESD, which works very closely with priority countries. In 2013, it started to undertake training for Afghan diplomats and civil servants on diplomacy, international relations and international cooperation training. In addition, it takes young diplomats/civil servants from Georgia and Moldova for 9 months free training, with the aim that these students will return to their public sector jobs and disseminate the good practices learnt in Estonia.

A focused educational initiative on traffic prevention has been run by SA Lõuna Koolitus (a CSO which operates along business lines, working in tandem with other private companies) in the Caucasus. In 2010 it ran a project in Georgia for school children in Tbilisi, sharing the experiences of the Estonian Police work in prevention work and helping lessen the traffic injuries. In 2012 a similar project was run for Moldovan school children.

2.8. Finance

Finance is a less chosen method of private sector development assistance, as many companies do not have large amounts capital to invest. Rather, the private sector focuses on sharing and disseminating know-how and expertise. Despite this, 44% of companies reported in the survey that their main area of activity is finance and insurance.

2.9. Technical assistance in building regional integration structures

Private sector technical assistance in building regional integration structures has mostly been undertaken by larger companies that have the capacity to undertake such activities. Skinest Rail¹⁴, a group of railway companies, has a wide range of activities and offers various services in many developing countries. The company contributes to building up an international railway network in some of Estonia's priority countries (Ukraine, Georgia and Belarus). This is achieved through the sales of rolling stock and spare parts, railway construction and rolling stock repairs, maintenance of railway equipment, technical consulting, sales and leasing of railway equipment and modernisation of railway equipment. While doing this, it offers jobs in many countries (according to data, they have around 10 people in leading positions in every country as well as many other people employed as technical assistance and other workforce). It integrates region by many means this way - it supports trade in the region, however, the same railway is used by passenger carriers as well.

¹⁴ <http://www.skinest.ee>

3. Participation of the Private Sector in Development Cooperation

3.1. Activities for increasing employment in developing countries

There are many activities for increasing employment in developing countries, such as the hiring of a local workforce and using local producers or providers. From the private sector survey, it is clear that the majority of private companies rely heavily on the local workforce to undertake the work in developing countries (44% of survey respondents employ over 75% local personnel in their total workforce). However, in some cases this is more than simply utilising the local workforce. Helmes¹⁵, an Estonian IT solution company, has set up a subsidiary in Belarus and trained a team of IT specialists there. The cause for this was not to outsource to a lower cost location, but rather as there is a shortage of IT specialists in Estonia. With the help of the Belarusian team, Helmes has started to undertake various development assistance projects in other priority countries. As Estonian companies are usually quite small and specialised, they generally employ either specialists from the partner countries (mainly well-educated employees who help find local partners, lobby for projects and seal the deals) or skilled employees who carry out the projects. Unskilled workers are generally not employed by Estonian companies.

3.2. Social activities in developing countries

There are various social activities the private sector can undertake which contribute significantly towards development assistance, such as increasing the level of female workforce, providing training to the local personnel, providing various social services, providing membership in local trade unions, or implementing a company code of ethical behaviour.

Many private companies offer such activities as part of their corporate social responsibility within the scope of their work. For example, the Estonian fashion designer Reet Aus¹⁶ has helped largest fabric and garment producer in Bangladesh to reduce textile waste in mass-production. Consequently, she has launched a collection based on upcycled clothes made with much reduced water and energy per garment. In doing so, she also supports the employment of local workers in Bangladesh.

The survey for the private sector actors found that in most cases companies offer extra benefits to the employees in the priority countries (44% of respondents), indicating that they are treated equally with the companies' Estonian employees. The most frequent type of benefit is social insurance (33%). This is followed by food vouchers/company canteen, vocational/in-house training, support for schooling, and health insurance (each 22%). However, the survey found that some benefits are not offered by any companies, such as daycare for children, employment injury benefits, maternity benefits, and occupational pension schemes. This may be explained that many Estonian companies only undertake projects in partner countries rather than having a permanent business established there, consequently the provision of such benefits is prohibitively expensive for the value of the work they

¹⁵ <http://www.helmes.ee>

¹⁶ <http://www.reetaus.com>

undertake. In any case, the level of benefits Estonian companies provide highlights their social responsibility, and that Estonian companies are not there merely to exploit the local workforce.

4. Participation of Different Kinds of Private Sector Representatives in Development Aid

Different types of private sector representatives, such as for-profit companies, multinational and regional banks, private insurance companies and private educational establishments have different roles and levels of importance within Estonian development cooperation.

Although private for-profit companies are the key drivers behind private sector development assistance they cannot work by themselves and rely on a support system, not only from the state structures but also in particular from private banks and insurance companies.

Multinational and regional banks are an integral part of private sector development assistance, as they grant funds to the private sector which can then be used for development assistance. However, Banks in Estonia are not too willing to grant special loans for investing in priority countries. There has also not been much talk about special grants from regional banks. This may be partly attributed to the global economic downturn, which caused banks to scale back on providing loans for projects that are perceived to have a higher risk of defaulting. Consequently, private sector actors have a somewhat negative attitude towards the banks.

The provision of multinational grants is a big issue for some of the interviewed companies. The general feeling is that funds (e.g. World Bank grants and funding) are usually granted to companies from the USA or other influential countries. Companies feel that this is the case because there is not the capacity to fulfil their expectations, for example, there are often not enough IT specialists and other personnel. In addition, for companies to get funding from multilateral institutions, strong and continued lobbying is often required, something which is fairly weak. One interviewee mentioned the examples of Italy and Greece, which have such lobbyists and have been successful in gaining funding and projects for their companies, even though their projects are often much weaker than Estonian ones. As such, companies feel that this is one area in which the government could strengthen the possibilities for increasing exports and improving development assistance.

Estonian private insurance companies are not currently active within development cooperation. One interviewee commented that there is a great lack of investment insurance for Estonian companies to invest in the priority countries. Most European countries have such a system, where they try to secure large investments and through this increase investments to countries which are not always considered safe to invest to. Estonia has a similar system run by the Credit and Export Guarantee Fund KredEx, although its programme is not considered to be effective by the private sector. It can take at least half a year to get the insurance and KredEx is not willing to cover many trade and development sectors.

Another key private sector representative is the private educational establishments. As noted above, there are not too many private educational establishments as such activities are usually undertaken by the state or CSOs. Therefore, their impact on development aid has been somewhat limited to date.

5. Future Plans and Qualitative Assessment of Private Sector Development Aid Effectiveness

On the basis of the surveys, focus group discussion results and interviews, it is clear that the Estonian private sector has much more potential than has been used to date. This is not necessarily a problem which is solely confined to Estonia, as many other countries are in a similar situation. Nevertheless, a greater inclusion of the private sector in future would significantly increase the level and effectiveness of development assistance.

Estonian private sector development assistance activities are still yet to take off, although this is natural given stage of private sector development (e.g. EBRD indicators show improvement still needed in enterprise restructuring, competition policy, securities markets & non-bank financial institutions). The stronger the private sector becomes, the greater the chance it will contribute more to development assistance activities.

Private sector aid and assistance that has been given has not yet been fully mapped or evaluated. This is a crucial first step in defining the private sector's potential for development aid effectiveness. This should be undertaken by the MFA in conjunction with other private sector associations and representatives.

Another key issue is that the private sector still does not understand its potential role within development assistance and consequently it does not consider its actions to be development assistance. The level of knowledge varies from sector to sector, with the ICT sector being relatively more well-informed and other sectors such as the trade sector being less informed or assessing less their development assistance effectiveness. Consequently, there are cases where companies are undertaking activities which could be considered development assistance although they do not seek help from the state in supporting their activities.

Most current private sector activities are profit-orientated; therefore the effectiveness of development assistance has not been deemed necessary to evaluate them.

A major issue is that many Estonian companies do business with neighbouring countries and more developed countries, rather than developing countries. Private companies seek to do business with equal partners: if such partners do not exist in the recipient countries or there are no markets for its products, it is difficult to justify being there. Many companies would be encouraged to enter less developed markets if they had greater support from state mechanisms.

6. Conclusions

At the moment, there are very few initiatives which motivate the private sector to deliver development aid. Indeed, although this could be seen as a missing piece in Estonian development cooperation policy, it should be borne in mind that this is no different than the experiences of other developed countries. Further inclusion of this important sector would expand the potential impact of Estonian official development assistance in its priority countries and beyond.

Support for business activities in developing countries is given through project financing by the MFA as well as some funding for entrepreneurship from Enterprise Estonia and guarantees from KredEx. However, the companies have not widely taken up these forms of funding. This might be due to the nature of the private sector not being fully aware of the possibilities, but equally could also be attributed to the project compatibility issues and difficulties in obtaining finance and insurance.

Most of the different channels of private sector development assistance apply in the case of Estonia, albeit to differing relevancies. Some are more prevalent and important (e.g. training and education), whilst others play a marginal role, are not very relevant, or are still notably absent (e.g. finance). This has been a reflection of Estonia's desire to share its experiences.

Private companies have been quite active in supporting development assistance through their activities, possibly as a result of strengthened corporate social responsibilities. However, given the relatively limited resources these companies have not been able to offer as much as they might hope. A first step towards exploring the potential of the private sector would therefore be to map this highly heterogeneous sector.

7. Recommendations

On the basis of the analysis presented above, recommendations can be made to different groups of stakeholders which should be considered for increasing the effectiveness of the private sector in development assistance. These are as follows:

Estonian Government

- In all of Estonia's development assistance priority countries, there should be strong embassies with a permanent economic attaché or business representative, who would link Estonian companies with local governments, policy makers and entrepreneurs. According to Estonian entrepreneurs, such business–politics cooperation is a necessity in Estonia's priority countries and other countries with developing markets.
- Increase the role and level of input from the Ministry of Economic Affairs and Communications and the Ministry of Finance in fostering private sector development assistance, as these ministries contribute significant amounts to ODA and have a large wealth of knowledge about supporting entrepreneurship.
- At the World Bank, UNDP, IMF and other such global organisations engaged in development assistance there should be lobbyists who would help to get development assistance projects to Estonian companies. It is considered crucial for further integrating private companies into the development assistance sphere.
- More information about international and national funds to incorporate development assistance issues to making business abroad (in priority countries and other countries with developing markets). This could include greater information and project calls.
- Review the system for insuring investments in order to support the increase of direct investments to Estonian priority countries.
- Include private sector associations and representatives when planning and reviewing the priority country list, to ensure the choices also incorporate business ties and economic reasons rather than being made predominantly on a political basis.

Private sector

- Hold the private sector to account for strengthening its links with public sector and CSO development assistance actors (as per the HLF4 aim). This could be achieved through soft initiatives, such as training and information dissemination (e.g. a series of seminars or workshops where the importance of the private sector could be clearly highlighted), as well as hard initiatives, such as legislation.
- Good cooperation and links between Estonian companies and the public sector (ministers and other key policy makers) should continue. All diplomatic and business delegations to the countries with developing markets and Estonia's priority countries has highlighted how needed such a combination is. Also, there has not been any problem in getting Estonian ministers (for example the Minister of Economic Affairs or Minister of Foreign Affairs) to do much needed official visits to seal some important business deals with priority countries or other developing countries. Ministers have been very supportive and helped as much as they have been able to.

- Business associations and representatives could regularly collect more information about companies' activities abroad, so that the state could provide them with information and other services to improve their stance within the sphere of development assistance. At the same time, this mechanism could serve as an input for the ministries when drafting regulations.

Appendix 1. List of interviews

Liina Grünberg, Director of External Relations Bureau, Ministry of Agriculture

Ruth Oltjer, Executive Director, Chemi-Pharm

Oleg Ossinovski, Owner, Skinest Rail

Kaupo Reede, Director, Harju County Entrepreneurship and Development Consultancy

Christman Roos, Specialist, Internal Market Department, Ministry of Economic Affairs and Communication

Indrek Vimberg, Executive Director, ICT Demo Center

