

Go Egypt – Plenary Kick-off Meeting

June 11th 2020



DRAFT

BAIN & COMPANY 

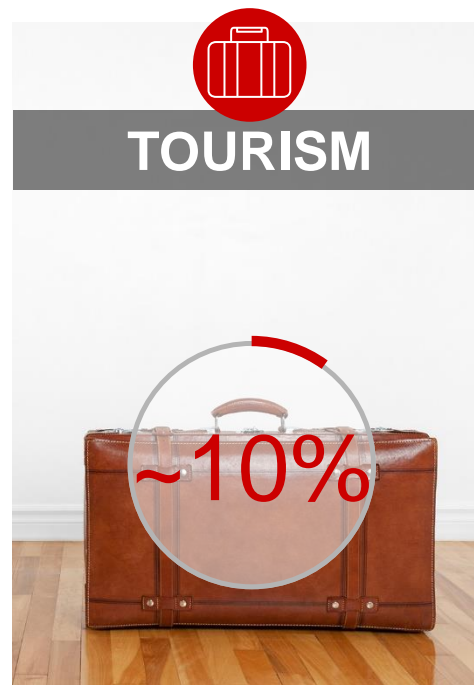
Go Egypt - Project Objectives

- Objective of the project is to **identify practical actionable initiatives to re-launch Egyptian economy post-Covid and improve Egypt economic position**
- The project will be organized in **two phases**:
 - A **first phase**, with a duration of **6 weeks** (starting next Sunday), that will
 - > Assess current situation
 - > Identify practical actionable initiatives and high level roadmap
 - > Quantify economic impact
 - > Start discussing how to finance initiatives
 - A **second phase** where the working groups and the economic committee will **oversee and steer detailed design and implementation of the recommend actions**



How we are set-up to deliver: 5 streams and 5 committees

4 vertical streams representative of key Egyptian economy sectors



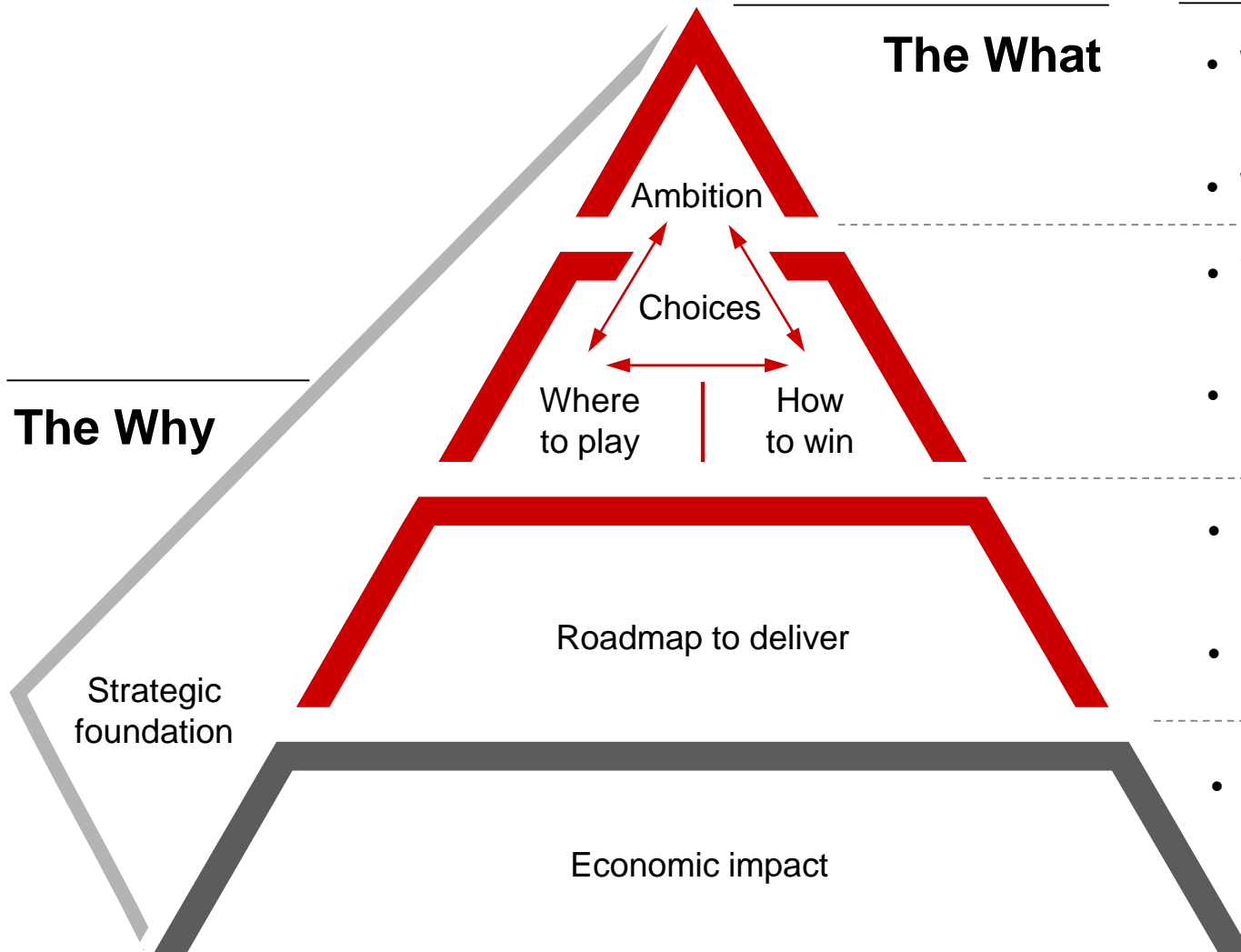
XX% Egypt GVA share '19

1 horizontal stream to estimate economic impact



Note: Industrial GVA includes mining, manufacturing, construction; tourism GVA includes travel; *Telco/digital GVA includes only telco and ICT services
Source: statista, trading economics, IHS

We will generate a **White Paper** leveraging a **Strategic Approach**

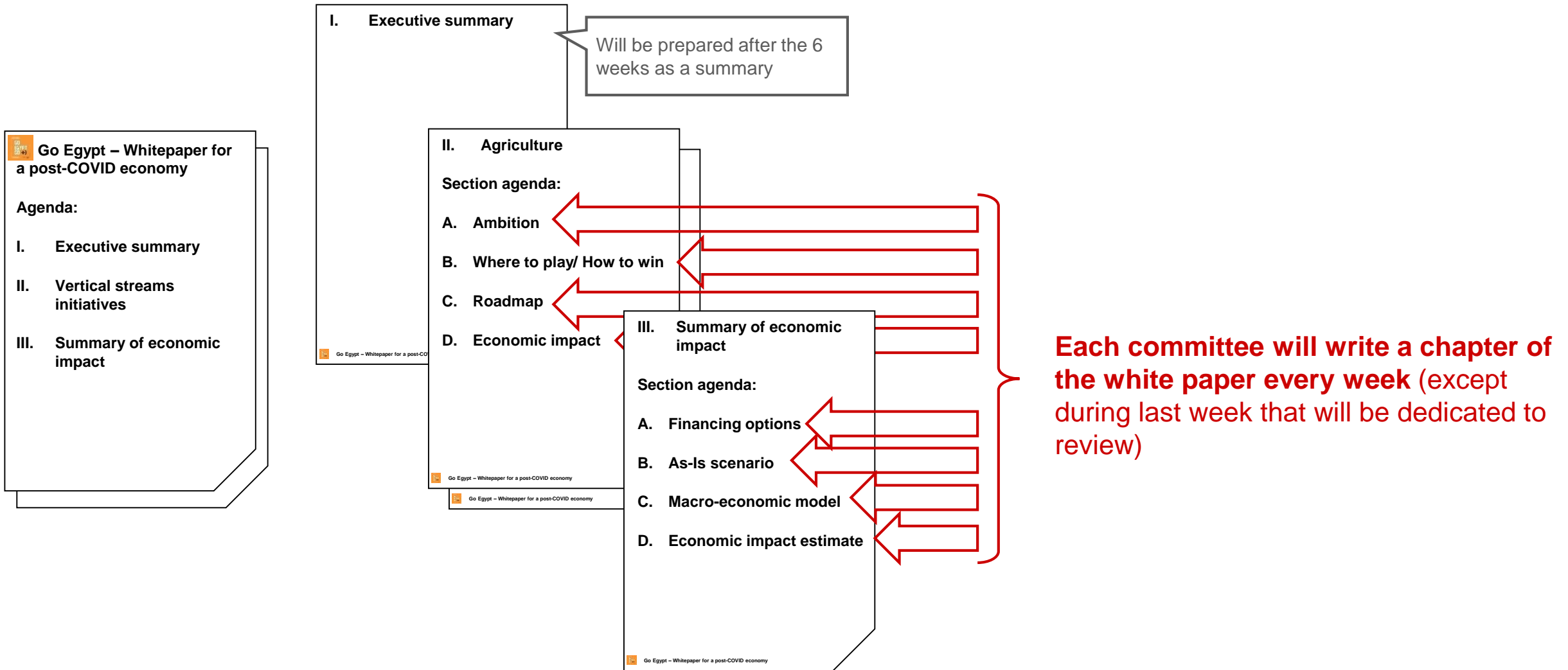


Key questions to be addressed

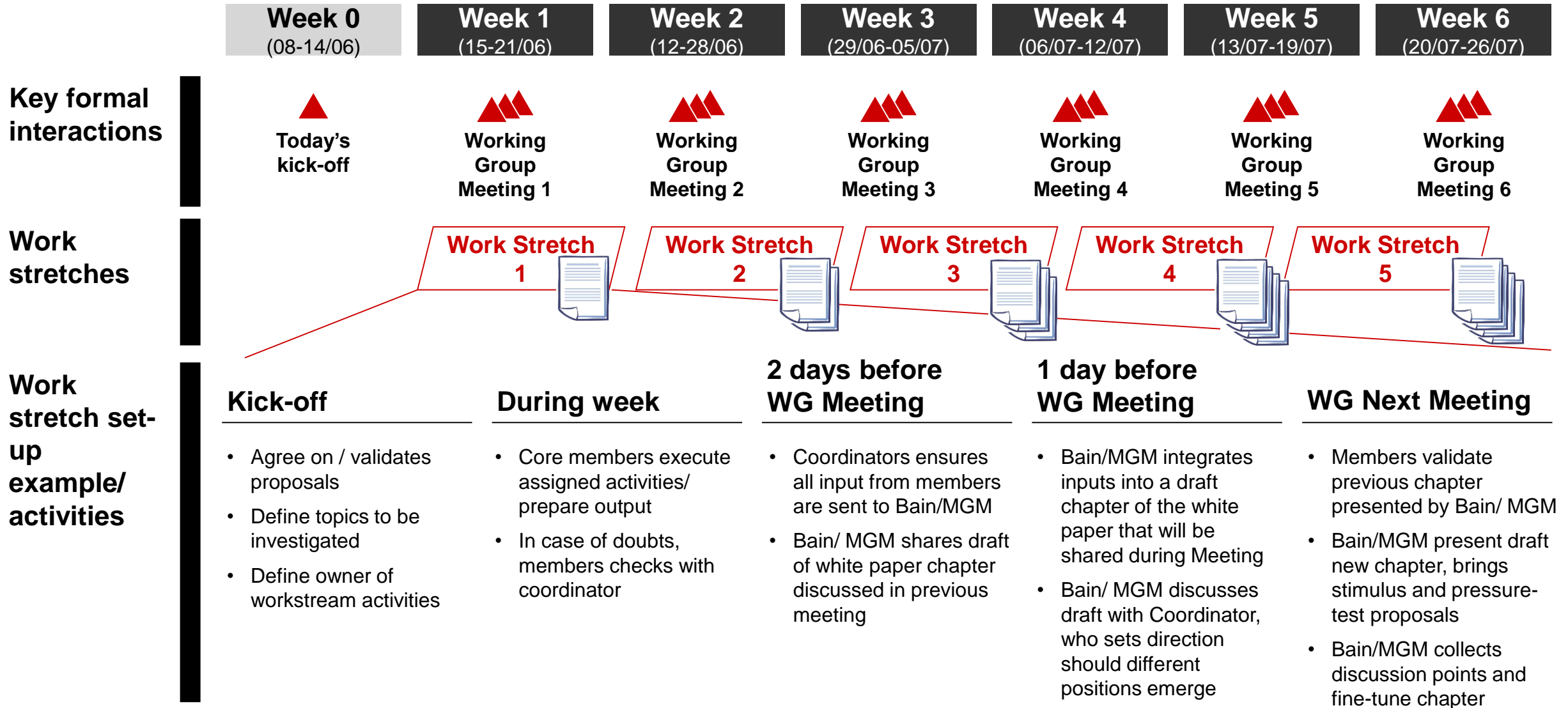
- **Where we want Egypt to be in 5 years' time** in the 4 industries assessed by this project?
- What **contribution to GVA, Export and Employment?**
- **Which subsectors** should be **strengthened** with higher priority and why?
- How **could be improved** the **competitive positioning** of Egypt in the priority subsectors?
- **Which are the actions to be implemented** to reach the defined level of ambition in 5 years time?
- Which are the **key accountabilities** of the actors involved?
- What is the **expected economic impact in 5 years'** time in terms of GVA contribution, investments needed and source of financing?

The **White Paper** will have a **clearly defined agenda**, where each meeting will contribute to a chapter of the overall document

/ ILLUSTRATIVE



First phase will last 6 weeks with each week organized as a repeatable module to help build the final modules of the whitepaper



Specific weekly routine / schedule by Committee

/ MEETING SCHEDULE (TIME/DAY)

	WEEK N					WEEK N+1				
	SUN	MON	TUE	WED	THUR	SUN	MON	TUE	WED	THUR
TOURISM	Bain prepares Meeting	Week N Meeting 12.-13 pm	Committee executes assigned activities		Members Send inputs to Bain	Bain prepare Meeting	Week N+1 Meeting 12.-13 pm	Committee executes assigned activities		Members Send inputs to Bain
TELCO / DIGITAL	Bain prepares Meeting	Week N Meeting 13.-14 pm	Committee executes assigned activities		Members Send inputs to Bain	Bain prepare Meeting	Week N+1 Meeting 13.-14 pm	Committee executes assigned activities		Members Send inputs to Bain
AGRICULTURE	C.tee executes assigned activities	Members Send inputs to Bain	Bain prepares Meeting	Week N Meeting 12.-13 pm	Committee executes assigned activities	Members Send inputs to Bain	Bain prepares Meeting	Week N+1 Meeting 12.-13 pm	C.tee executes assigned activities	
INDUSTRY	C.tee executes assigned activities	Members Send inputs to Bain	Bain prepares Meeting	Week N Meeting 13.-14 pm	Committee executes assigned activities	Members Send inputs to Bain	Bain prepares Meeting	Week N+1 Meeting 13.-14 pm	C.tee executes assigned activities	
ECONOMY	C.tee executes assigned activities	Members Send inputs to Bain	Bain prepares Meeting	Week N Meeting 14.-15 pm (TBC)	Committee executes assigned activities	Members Send inputs to Bain	Bain prepares Meeting	Week N+1 Meeting 14.-15 pm (TBC)	C.tee executes assigned activities	

6 meetings for each stream with clear objectives and deliverables

Vertical streams objectives and deliverables

① Committee kick-off

- Presentation of working group
- Discussion on expected deliverables and contributions by week and way of working
- Everyone's initial POV on ambition

② Ambition Definition

- Discussion of current point of departure
- Discussion and definition of a level of ambition in 5 years with rationales

③ Where to play/ How to win

- Prioritization of sub-sectors according to attractiveness and ability to win of Egypt
- Discussion of key enablers to win in the "where to play" arena

④ 5 years Roadmap

- 5 years execution plan with definition of key milestones and assignment of key accountabilities

⑤ Key economic impact

- Expected economic impact in 5 years time vs inertial scenario due to roadmap implementation and investments in place

⑥ Whitepaper finalization

- Final review of the whitepaper
 - Ambition
 - Where to play
 - How to win
 - Roadmap
 - Economic impact

Economic Stream objectives and deliverables

① Committee kick-off

- Presentation of working group
- Discussion on expected deliverables and contributions by week and way of working

② Financing options discussion

- Possible financing options and current situation for the 4 vertical assessed (GVA, employment,...)

③ As-is scenario

- 2020 economic projection (post covid) of the 4 verticals assessed

④ Macro economic model

- Macroeconomic model development and key input data set KPIs by each stream

⑤ Economic impact estimate

- Validation of inputs and outcomes for each vertical and consolidation of overall view

⑥ Whitepaper finalization

- Final review of the whitepaper
 - Ambition
 - Where to play
 - How to win
 - Roadmap
 - Economic impact

White paper preparation



A clear standard agenda for each meeting (excluding first and last one)

Working Groups meeting agenda structure/ timing

15 mins

- **Review and validation of previous week chapter**, based on inputs received and on decisions taken with Coordinator
 - **All inputs to be provided before the meeting**, no new content shared during meeting

30 mins

- **Discussion on draft of current week chapter** prepared by Bain/ MGM **based on inputs received and validated by coordinator** on topics with different positions in the working group
 - **All inputs to be provided before the meeting**, no new content shared during meeting

15 mins

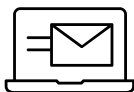
- Definition of **next steps** and formalization of **“home work” to prepare** next meeting



Some ground rules to ensure we effectively collaborate in a remote context: communication channels usage

Key remote collaboration tools and expected usage

Emails



- **Official communication channel** for formal communication and input submission with Bain/MGM
 - Coordinator will act as the interface with Bain/MGM

Video-conf



- **Official video collaboration platform** for weekly meetings/ other meetings

Whatsapp/ Phone calls







- **Informal communication channel** between coordinator/ and core members/ other members
 - Content of chat will not be structurally tracked and hence will not be used for whitepaper building

Meeting code of conduct

- **Email calendar invites will be shared ahead of time** to secure agenda
 - **Please connect at designated time** to avoid time-loss at the beginning of the meeting
- **Some ground rules** to ensure effective remote collaboration:
 - Connect **through a notebook/ desktop to be able to see and share material if needed**
 - Ensure to have a **reliable network connection** (i.e. Wi-Fi/ cable)
 - **Test your audio equipment** before joining to avoid delay
 - **Turn on video** whenever possible to ensure to connect personally
 - **Mute yourself** unless speaking
 - **English only discussions** to allow whole table engagement

Roles and Accountabilities: **Expert Committee** will provide contents and will co-develop / sponsor the whitepaper

	Accountabilities	Project dedication
Terous Foundation 	<ul style="list-style-type: none"> • Main sponsor of the Project • Ensure deliver assignment to goals • Ensure correct level of dedication of expert committee 	<ul style="list-style-type: none"> • Project Management time as needed
Expert Committee: Coordinator	<ul style="list-style-type: none"> • Owner and validation of contents • Make sure all core members provide required inputs • Primary interface of Bain/MGM • Co-develop/ approve and sponsor whitepaper 	<ul style="list-style-type: none"> • Significant investment of time (> 1 day/ week) <ul style="list-style-type: none"> – Participation to sessions – Preparation of material/ inputs pre-meeting – Review of documents post-meeting
Expert Committee: Core Members	<ul style="list-style-type: none"> • Provide inputs and point of view to Coordinator during group working sessions • Challenge / Provide inputs during weekly updates 	
Other members	<ul style="list-style-type: none"> • Provide inputs on ad hoc bases as requested by Coordinators 	<ul style="list-style-type: none"> • Ad hoc
Bain and MGM   	<ul style="list-style-type: none"> • Provides methodology and approach • Pressure test/ challenge POV and provides stimulus • Drumbeat / coordination of process • Ensure consistency of output • Synthesize whitepaper 	<ul style="list-style-type: none"> • Dedicated team by stream • Experts time as needed

Focus next slides!








Committee members and coordinators have been identified (details in appendix)

Committee Go Egypt - Agriculture

Name Surname	Job Title @ Company	Role in Committee	Contact email	Contact mobile
 Dr. Amr Masoud	Doctor and Expert in Agriculture, FAO	Coordinator	Amr.massoud@medilab-egy.com	+2 0122 212 3711
Loay El Kot		Core Member	Loay@saagro.com	+2 0100 110 0003
 Hesham El Naggar	CEO @ Daltex	Core Member	Hesham.elnaggar@daltexcorp.com	+2 0122 788 8270
Dr. Gamal Seyam		Core Member	Gamal_siam@hotmail.com	+2 01001648575
 Eng. Ayman Korra	Chairman of Cosu Korra	Core Member	mak@korra-holding.com	+2 01222107001
 Eng. Emad Tayeb		Core Member	emad.tayeb@agrolife-eg.com	+2 01005009707

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Committee Go Egypt - Industry

Name Surname	Job Title @ Company	Role in Committee	Contact email	Contact mobile
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 Dr. Nagwa Samak	Professor of Economics - Cairo University	Core Member	nagwasamak@cps.edu.eg	+201152388500 ; +2010165186395
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 Eng. Ayman Korra	Chairman of Cosu Korra	Core Member	mak@korra-holding.com	+2 01222107001
 Dr. Ahmed Darwish	Former Minister of State for Administrative Development	Core Member	darwish@eeec.org	+2 0122 224 7381
 Yarek Tawfik	Deputy Chairman of FEI	Core Member	Trkinefik1@gmail.com	+20122 210 5613
 Dr. Ahmed Filky Abdelwahab	Chairman of RAW	Core Member	ahmed.fawahab@googlemail.com	+20100 110 3130




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Committee Go Egypt - Tourism

Name Surname	Job Title @ Company	Role in Committee	Contact email	Contact mobile
 Ahmed El Waseef	President of the Federation of Tourist Chambers (Coordinator)	Coordinator	Wassief@wingsholding.com	+2 0100 540 4444
 Dr. Abla Ragab	Professor of Economics - Cairo University	Core Member	abla.ragab@cps.edu.eg	+2 01222116274
 Eng. Mahmoud Abdel Latif	Vice President of Travco Group	Core Member	Mahmoud.abdelatif@travco.com	+2 01222113396
 Abdelhamid Aboyoussaf	Chairman of Orascom Development	Core Member	Abdelhamid.aboyoussef@orascom.de.com	+2 0100 533 3386
 Moutaz Shilki	General Manager of Travco	Core Member	moutaz.schly@travco.com	+2 0100 888 9966
Tamer Makram		Core Member		+2 01222139218
 Dr. Hala Saqr	Professor of Economics - Cairo University	Core Member	sakrhala@yahoo.com	+20 100 519 5024

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Committee Go Egypt - Telecommunication

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 Eng Nehal Zaki	Ex Vodafone Egypt	Core Member	nihaltraki@gmail.com	+20 100 500 9569
 Heshem Zohair	Ex Mobilni	Core Member	heshemzohair@gmail.com	+20 122 211 2142 ; +201143526768
 Adel Danish	Chairman & CEO Eceeed	Core Member	Adel.danish@gmail.com	+20 122 211 4113
 Dr. Ahmed Darwish	Former Minister of State for Administrative Development	Core Member	darwish@eeec.org	+2 0122 224 7381

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Committee Go Egypt - Economy

Name Surname	Job Title @ Company	Role in Committee	Contact email	Contact mobile
 Osama Saleh	Former Minister of Investment & Board Member at SODIC	Coordinator	saleh_o@yahoo.com	+2 01222140692
 Ahmed Shams	Managing Director & Head of Research @ Egyptian Financial Group - Hermes	Core Member	ashamseldm@efg-hermes.com	+2 0100 0076914
 Maged Shawky	Chairman of Beltone Holding	Core Member	Msaourat@beltonefinancial.com	+2 0100 166 0525
 Hassan Samir	Managing Director @ Prime Holding	Core Member	hsamir@egyprimegroup.org	+2 0122 315 5838

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A specific Partner, Manager and Consultant from Bain will be assigned to each group (communicated before Sunday)

Q&A - Questions and Answers



- If you have any unanswered questions, please **feel free to submit either through the chat or orally**
- **Process questions or general questions that applies to all committees (process, methodology, type of involvement, ...) to be asked and answered today**
- **Sector specific content questions will be addressed during the committees' kick-off sessions next week**

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	Dr. Ahmed Fikry Abdelwahab	Chairman of FAW	Core Member	ahmed.f.a.wahab@googlemail.com	+20100 110 3130

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 Abdelhamid Abouyoussef	Chairman of Orascom Development	Core Member	Abdelhamid.abouyoussef@orasc.com	+2 0100 533 3386
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Tamer Makram		Core Member		+2 01222139218
 Dr. Hala Saqr	Professor of Economics - Cairo University	Core Member	sakrhala@yahoo.com	+20 100 519 5024

Committee Go Egypt – Telco / Digital



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 Eng Nehal Zaki	Ex Vodafone Egypt	Core Member	nihal.tzaki@gmail.com	+20 100 500 9569
 Hashem Zohair	Ex Mobinil	Core Member	hashem.zohair@gmail.com	+20 122 211 2142 ; +201143526768
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