

NATIONAL EXPORT

NATIONAL EXPORT
Strategy



JAMAICA

STRATEGY JAMAICA

“Jamaica, a leading per capita export country known for its commitment to creativity, innovation and exceptional quality.”



Ministry of Industry
Investment & Commerce



JAMAICA
TRADE & INVEST



Jamaica Exporters'
Association

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Foreword



The Hon. Bruce Golding, MP
Prime Minister of Jamaica

The Government of Jamaica is totally invested in the process to create an enabling environment for the trade and exportation of our many high quality products and services that can fetch premium prices in the global marketplace. Looking forward, it is my belief that we can significantly increase the levels of export competitiveness and sales by executing a winning strategy fuelled by healthy doses of self-belief.

In reflecting on the journey and efforts of all the benchmark countries in global trade and business- *Singapore, Hong Kong, China, the United States and Panama*- one must acknowledge that the sensible, cutting edge systems and procedures innovated by these countries were rooted in a fundamental 'can do' philosophy. It is this 'can do' energy and collaborative spirit that all our producers and exporters must tap into, in order to make this National Export Strategy work, in partnership with all the relevant agencies of the State and our international partners such as the International Trade Centre and the European Union.

As Prime Minister I want to pledge my support to be a champion and a driver of this process. When all is said and done, it will be our shared belief in our capacity to innovate and produce that will drive the competitiveness of our export sector and create increased wealth for the nation. It will be the skilful execution of this National Export Strategy that will effectively position Jamaica's exports in target markets.

Notwithstanding the vicissitudes of global trade and business, let us never cease to draw inspiration from our glorious history, which has defined us as a unique people, a nation of world class competitors, who have time and time again prevailed against incredible odds!

I congratulate all the stakeholders in this critical process for wealth creation and economic development. Let us never stop believing and working hard to make this vision a reality.



The Hon. Karl Samuda, MP
Minister of Industry, Investment and Commerce

The National Export Strategy represents an important policy tool in the Ministry of Industry, Investment and Commerce that seeks to prepare the Export Sector on all fronts- *beginning with the producer taking his goods and services to market, to the critical role of the facilitators of trade who provide the lubricant to make the process happen...all the moving parts in this process, synchronized and working in perfect harmony.*

This vision of a finely honed mechanism that accommodates every cog in the wheel to work hard in pursuit of an export trade that is efficient, globally competitive, and a high revenue earner that contributes to the overall development of the economy is the ultimate goal of the NES.

In keeping with this, the Ministry of Industry, Investment and Commerce is committed to providing the requisite support to make the Strategy a resounding success.

This National Export Strategy represents an important milestone in that journey to defeat the myriad of challenges that have stymied our progress. We now have a system where every player engaged in the process of packaging, processing and delivering a Jamaican good or service to export markets can collaborate cohesively and consistently!

In so doing, we can make Jamaica in a relatively short time, the undisputed trade and export hub of the Caribbean in a world without borders that affords the 21st Century Jamaican Businessperson to do business with anybody he or she desires. This must be the mission of the NES.

I commend the continuing work of the Jamaica Export Council, Jamaica Trade and Invest and the Jamaica Exporters' Association for their leadership role in this arduous but important process that requires the engagement of so wide a cross section of stakeholders. Generations to come will remember us kindly for our efforts in this initiative.

Statements



Robert Gregory, CD
President, Jamaica Trade & Invest

The visionary mandate of Jamaica Trade and Invest is to achieve sustained economic development for Jamaica through increased trade & investment. By so doing, we are seeking to build the competitive advantage of Jamaican goods and services on the platform of culturally inspired creativity and innovation. Achieving a competitive advantage means that there has to be an effective distinction and differentiation of one's products or services from others in the global market place. In that equation, culture is the only differentiating and distinguishing factor remaining in this globalized, homogenized world we live in today. And indeed, much of what now amounts for global trade is essentially trading in cultures.

The National Export Strategy (NES) provides us with a flexible tool that will enable us to meet global demand for highly differentiated culturally inspired Brand Jamaican products and services, especially our existing and emerging non-traditional exports.

JTI also regards the NES as a functional network that offers a range of export solutions, including:-

- Consistent, affordable, effective and quality business advice to our producers.
- Training for prospective exporters in a range of skills such as business plan writing and preparing funding proposals. Exporters with similar interests and challenges will collaborate through the exchange of experiences, contacts and information.
- Standardized, universal and value-added services through islandwide Export Centres and Business Information Points.

As Jamaica moves towards becoming a robust exporter to the world, JTI in partnership with the Jamaica Exporters' Association, JEA, will push for the legislative institutionalisation of the National Export Strategy and continued capacity development and training. We will structure regular communications and create formal linkages among stakeholders, and work with trade institutions to eliminate duplication and road blocks.

Jamaica has a range of innovative goods and services with strong potential to be world class exports. Our commitment is to utilise the Strategy to the fullest with all our partners and stakeholders, in order to achieve global competitiveness for Jamaican exports.



Michael Lumsden
President, Jamaica Exporters' Association

The Jamaica Exporters' Association (JEA) sees the National Export Strategy (NES) as an important framework for the advancement of Jamaica's Export Industry. We believe that with the successful implementation of the NES we will be able to realize the vision of Jamaica being one of the leading per capita export countries in the Caribbean .

The JEA is confident that the NES will improve the standard of the export industry by the implementation of sector strategies for more effective, efficient and globally competitive trade. The NES will also enhance the development of Jamaica's export sector and business environment and improve the competitiveness of our firms.

Brand Jamaica is one of the most recognizable brands internationally and it is important that we utilize the National Export Strategy to position Jamaican exporters of goods and services to capitalize on the opportunities which exist for Jamaican products and services in the international market, while at the same time strengthen *Brand Jamaica* to achieve a stronger positioning globally.

The National Export Strategy will transform Jamaica's export industry and improve our performance in our leading export markets. Through employment creation, export diversification, improved Net International Reserve and increased contribution to GDP, the NES will also help in creating greater wealth for the nation by reducing the disparity between earnings from exports and imports.

As part of Jamaica's National Development Plan, Vision 2030, the NES has set specific goals to be achieved in the next five years and the JEA is committed to working with our partners on the National Export Council to realise these goals.

We look forward to the continued collaboration with the Government of Jamaica, through the Ministry of Industry, Investment and Commerce, the International Trade Centre, multilateral agencies and all the players in the Export Sector as we work together to build a better Jamaica.



Dr. Wesley Hughes, CD
Director General, Planning Institute of Jamaica

As barriers to trade fall, nations with small domestic markets, such as Jamaica, are able increasingly to achieve economies of scale through access to large international markets. Our ability to take advantage of export markets is fundamental to our economic development and is enhanced by our strategic geographic location, strong Nation Brand and relations with the Jamaican Diaspora.

The National Export Strategy represents a major initiative to improve Jamaica's export performance by enhancing the trade and business environment and improving the competitiveness of firms and sectors. It will provide sector-specific measures to enhance key exporting industries, improve the bureaucratic processes for exporters, and strengthen a range of supporting services such as trade information and finance, export quality management, trade facilitation, branding, and trade promotion. As such, it is wholly consistent with the goals of Vision 2030 Jamaica - National Development Plan and is a key action for achieving international competitiveness on our path to becoming a developed country with a prosperous economy.

As the agency established to *stimulate, facilitate, and promote* the development of trade and industry, the JTI is strategically positioned to ensure the successful implementation of this key export strategy which has been identified as a priority within the first three years of implementation of Vision 2030 Jamaica – National Development Plan.

The Planning Institute congratulates the JTI for spearheading this initiative and pledges its support for its full implementation.



Patricia Francis
Executive Director,
International Trade Centre, UNCTAD/WTO

The National Export Strategy of Jamaica represents an important milestone in the country's drive to position exports as a principal means to achieve further development, within the context of the broader national goals. The Vision 2030 National Development Plan, which specifies international competitiveness as a key area for the country's national development, has served as the beacon and the inspiration for Jamaica's National Export Strategy.

The strategy design process has been a challenging, but rewarding experience. It has engaged the expertise and the insights of a large number of practitioners at the policy, institutional and enterprise levels in a consultative forum over many months. It has taken into account the constraints and the concerns of those who have an impact on export development and export competitiveness, and built upon mutually agreed opportunities. The result is a highly detailed, specific and realistic strategy that will serve as the roadmap for enhanced export performance, and the socio-economic benefits that this promotes. It is truly a national export strategy made by Jamaicans, for Jamaicans.

The National Export Strategy is not written in stone; nor is the national and international trading environment static. New challenges will surely emerge. The public-private dialogue that the export strategy initiative has strengthened should not stop. Rather, this consultative process should be reinforced to keep the key stakeholders engaged in the pursuit of an export strategy that is relevant and that continues to respond to the country's current needs and challenges.

This strategy document is not an end in itself. Whilst the purpose of the strategy is to provide an agreed and transparent architecture for the export sector to flourish, it will make an impact only through its implementation. The end of the design phase thus marks the beginning of an even more challenging chapter – the implementation of the initiatives and activities elaborated in the strategy's plan of action so that the targets, the objectives and the impact are achieved.

Jamaicans are right to feel proud of this important achievement. ITC is equally proud to have been Jamaica's partner throughout the process. We pledge our commitment to continue providing excellent support and assistance in line with our vision of achieving "Export Impact for Good".

Acknowledgements

The National Export Strategy was developed under the leadership of the Minister of Industry, Investment & Commerce with technical assistance from the International Trade Centre UNCTAD/WTO, and partial funding from the Private Sector Development Programme (PSDP), a joint initiative of the Government of Jamaica and the European Union.

The Strategy development and implementation is being managed jointly by Jamaica Trade and Invest and the Jamaica Exporters' Association. The Strategy fits under the "International Competitiveness Outcome" of Vision 2030, Jamaica's National Development Plan.

The development of the National Export Strategy has been a one year process involving public and private sector entities; some of which are members of the Jamaica Export Council. The Council is an independent body comprising representatives of the public and private sectors, charged with the execution of the Strategy while acting in an advisory capacity to the Government and private sector stakeholders.

The Council comprises representatives of the following public and private sector entities which are critical members of the trade support network and wider export community:

Ministry of Industry, Investment & Commerce
Jamaica Trade and Invest
Jamaica Exporters' Association
The Planning Institute of Jamaica
Private Sector Organization of Jamaica
Jamaica Manufacturers' Association
Small Businesses Association of Jamaica
Bureau of Standards of Jamaica
Factories Corporation of Jamaica
Jamaica Business Development Corporation
University of the West Indies
Scientific Research Council
Trade Board Ltd
Ministry of Finance & the Public Service
Jamaica Customs
Office of the Prime Minister (Planning & Development)
Urban Development Corporation
National Export-Import Bank of Jamaica Ltd.
Development Bank of Jamaica
Ministry of Transport & Works
Ministry of Energy

Ministry of Mining & Telecommunications
Mines & Geology Division
Jamaica Bauxite Institute
Jamaica Constabulary Force
Port Authority of Jamaica
Ministry of Health & Environment
Ministry of Foreign Affairs & Foreign Trade
National Environmental Planning Agency
Ministry of Agriculture
Ministry of Information, Culture, Youth & Sports
HEART Trust / NTA
Jamaica Bankers' Association
Jamaica Cultural Development Commission
Caribbean Regional Negotiating Machinery
Jamaica Deposit Insurance Corporation
Jamaica Stock Exchange
Jamaica Employers' Federation
Shipping Association of Jamaica
Customs Brokers Association & Freight Forwarders
Association of Jamaica
Jamaica Chamber of Commerce

The specific sector strategies emerged from the work of dedicated teams for each of the priority sectors, *which met for numerous consultations. There were over eighty (80) participants from the private sector alone,*

The strategy was validated at a stakeholders workshop held on March 17, 2009 at the Jamaica Pegasus Hotel in Kingston attended by One Hundred and Fourteen (114) persons comprising individuals from firms and organisations in the public and private sector:

Recording Industry Association of Jamaica/JACAP
Jamaica Reggae Industry Association - Music Cluster
Caribbean Agribusiness Association (CABA)
Freight Forwarders Association of Jamaica Ltd
Jamaica Association of Dramatic Artists
Jamaica Fashion & Apparel Cluster
Ministry of Industry, Investment & Commerce
Jamaica Trade and Invest
Jamaica Exporters' Association
Planning Institute of Jamaica
Private Sector Organization of Jamaica
Jamaica Manufacturers' Association
Small Business Association of Jamaica
Bureau of Standards of Jamaica
Factories Corporation of Jamaica
Jamaica Business Development Centre
University of the West Indies
Scientific Research Council
Trade Board Ltd
Ministry of Finance & the Public Service
Jamaica Customs
Office of the Prime Minister (Planning & Development)
Urban Development Corporation

National Export-Import Bank of Jamaica Ltd.
Development Bank of Jamaica
Ministry of Transport & Works
Ministry of Energy
Ministry of Mining & Telecommunications
Mines & Geology Division
Jamaica Bauxite Institute
Jamaica Constabulary Force
Port Authority of Jamaica
Ministry of Health & Environment
Ministry of Foreign Affairs & Foreign Trade
National Environmental Planning Agency
Ministry of Agriculture
Ministry of Information, Culture, Youth & Sports
HEART Trust / NTA
Jamaica Bankers' Association
Jamaica Cultural Development Commission
Caribbean Regional Negotiating Machinery
Jamaica Deposit Insurance Corporation
Jamaica Stock exchange
Jamaica Employers' Federation
Shipping Association of Jamaica
Customs Brokers Association & Freight Forwarders Association of Jamaica
Jamaica Chamber of Commerce

The National Export Strategy has received the endorsement and support of the following key private sector entities:

- Jamaica Chamber of Commerce
- Jamaica Manufacturers' Association
- Private Sector Organisation of Jamaica
- Small Businesses Association of Jamaica

SECTION 1: WHY A NATIONAL EXPORT STRATEGY FOR JAMAICA?

Goal#1 Achieving Export-led Growth

With its near-shore location to the largest consumer market in the world, and exports accounting for one-fifth of GDP, Jamaica regards itself a trading nation with vast prospects to exponentially increase its current levels of exports to the world. As the second-biggest market in the Caribbean Community (CARICOM) trading bloc, it boasts an economy that is highly open and diverse relative to its Caribbean neighbours, but which has traditionally been an under-performer in export volumes, resulting in a widening trade deficit.

Yet, when considered in the context of the overall sub-optimal performance of Jamaican exports, there have been some notable achievements. The services sector, led by tourism, has attracted sizeable foreign investment this decade and export-free zones across the island are encouraging further industrial diversification to achieve a positive impact on productivity. The Government and the productive sector have long pinpointed a range of sector-specific weaknesses and a number of cross-cutting issues which have impeded the *global competitiveness* of the sector, and the achievement of export-led growth.

The National Export Strategy, whilst not a panacea, proposes actions and responses to these perennial challenges, and lays out a coherent road-map to grow and sustain exports that create wealth and engender real economic development. Jamaica's National Development Plan *Vision 2030* which states:

“Jamaica, the Place of Choice to Live, Work, Raise Families, and Do Business”

provides the framework for the vision of the National Export Strategy, which seeks to make;

“Jamaica, a leading per capita export country known for its commitment to creativity, innovation and exceptional quality.”

The success of the strategy requires broad stakeholder collaboration that will inform policy formulation by the Ministry of Industry, Investment and Commerce, which in turn supports high levels of performance by our exporters, buttressed by a highly facilitative trade support network.

As a point of emphasis, the vision reinforces *creativity, innovation and quality* as central to the formidable goals of the National Export Strategy. It posits the creation of quality of jobs, national economic development and the sustainable use of resources as key deliverables in the initial five years of the Strategy, by:-

- Contributing to overall GDP growth by increasing the export sector's contribution to GDP from one-fifth to one-third by 2013;
- Increasing the export sector's contribution to overall employment generation thereby improving the livelihoods of marginalised groups;
- Achieving greater diversification of the export sector by:

- Attaining higher value addition in all priority sectors;
- Increasing the current value of non-traditional exports of goods by 2013 through increased volumes and higher value addition;
- Increasing the contribution of services exports as a percentage of overall exports with particular emphasis on developing professional services and creative industries export sectors;
- Increasing penetration in existing markets and accessing new and emerging markets;
- Maintaining a 'competitiveness mindset' at all levels to ensure the reliability and sustainability of the sector.

The Macro Picture

In the face of the external turbulence from the global financial meltdown, which has had a major impact on the North American markets on which Jamaica depends for half of its export revenues, as well as invisible earnings, the stance of the Jamaican export sector is to be prepared and proactive. Jamaica enjoys political stability and broad consensus on market-oriented reforms. The Government has committed to maintaining a stable macro-economic framework to improve business confidence and create predictability, whilst keeping inflation in single digit range. The macro-economic environment also seeks to facilitate tax reform and continued support for:

- A real exchange rate.
- A relatively efficient tax system
- An independent Central Bank
- A well-developed, globally connected Financial Services Sector
- World-class accounting and auditing standards
- Diminishing bureaucracy and red tape, a major mandate of the Ministry of Industry, Investment and Commerce.
- And, a well-developed infrastructure for business, characterized by sophisticated technology, superior air transport infrastructure quality and world-class ground and highway transportation links

The international financial institutions (IFIs) have consistently praised Jamaica's efforts to entrench macroeconomic stability and raise growth by improving the business climate over the medium-term. The Government in dialogue with the Private Sector has formulated a medium-term strategy, supported by multilateral organisations, aimed at putting the island on a path of robust growth while reducing poverty and unemployment. The Government's main objectives are to achieve:

- Reduced public debt/GDP ratio by fiscal consolidation and elimination of budget deficit by 2010/11. Servicing of debt absorbs one-third of public spending or 13% of GDP at the expense of badly needed capital investments;

- Private sector led growth through the expansion of capacity in the manufacturing and export sectors and ultimately boosting job creation;
- Prudent monetary policy to reduce inflation expectations and maintenance of adequate foreign exchange reserves to underpin confidence in national currency;
- Social sector priorities including the Millennium Development Goals (MDGs) and targets on human development/opportunity, as well as law and crime;
- Enhanced business climate and a reformed tax system to increase efficiency and effectiveness, thus higher revenue collection;
- Further improvement in the quality of governance through better public sector management and a trimmed bureaucracy.

Jamaica faces challenges such as 10% unemployment, brain drain and urban crime, which in some areas imposes 'opportunity costs' in terms of lost production, health expenses and private spending on security.

A World Bank study, '*Jamaica: The Road to Sustained Growth*', argues that to achieve self-sustaining growth, it should improve overall competitiveness and productivity, while taking concrete actions on debt overhang, job creation and tackling corruption.

There are risks and uncertainties facing all Caribbean nations in an increasingly complex and interdependent world. However, a genuine commitment to growth-enhancing reforms underpinned by prudent macro-policies, and a well-designed and far-reaching National Export Strategy, provides the foundation for future prosperity.

Figure 1: Key Economic Indicators for Jamaica, 2004-2008

Economic indicators



Table 1: Key Economic & Financial Indicators

	2004/05	2005/06	2006/07	2007/08	Projections	
					2008/09	2009/10
Nominal Gross Domestic Product (GDP) (in billions of national currency)	550	643	707	801	964	1087
Total GDP (in millions of U.S. dollars)	8,957	10,200	10,700	11,500	13,020	13,812
Nominal GDP growth ¹	10.9	17.0	10.0	13.3	20.3	12.7
CPI inflation / (period average)	12.8	14.8	7.4	12.1	17.2	9.7
Real GDP growth ¹	0.4	2.0	2.4	1.0	2.7	2.8
Short-term interest rates (in percent)	14.7	13.0	12.3	12.4	-	-
Real interest rates (inflation-adjusted)	1.9	-1.8	4.9	0.3	-	-
Nominal exchange-rate depreciation ²	1.0	6.2	3.5	5.4	5.3	5.0
EMBI ³ secondary market spread (bps)	405	301	320	522	-	-
Government operations						
Budgetary revenue and grants ⁴	31.2	29.0	29.9	31.2	30.0	31.0
Budgetary expenditure ⁴	36.6	32.7	35.5	35.7	35.0	33.5
Budget balance ⁴	-5.4	-3.7	-5.6	-4.5	-5.0	-2.5
Public debt stock (US\$ billion) ⁵	12.5	13.1	14.1	14.5	15.3	15.9
Government debt ⁴	139.5	128.4	131.7	126.1	117.5	115.1
Average interest rates on public debt	14.3	13.0	12.2	11.8	14.2	13.3
Gross financing needs (US\$m) ⁶	2,900	2,700	3,300	2,200	2,700	2,400
As percent of GDP	32.4	26.5	30.8	19.1	20.7	17.3

Fiscal years run from April 1 to March 31; ¹Annual percent change; / Consumer price index (in percent); ² Versus the U.S. Dollar; ³Emerging-Market Bond Index (basis points above the US Treasury bonds); ⁴Percent of GDP; ⁵Includes domestic and external liabilities; ⁶Defined as public sector deficit, plus amortisation of medium and long-term public debt and short-term debt at end of previous period.

Sources: Bank of Jamaica, Ministry of Finance and IMF.
Demographics: Area: 11,425 km²; Population: 2.7mn (2007); Population density: 238.2 people/km²; GDP per capita: US\$4,140 (2007); Currency: Jamaican dollar (2008 average US\$1 = J\$72.67).

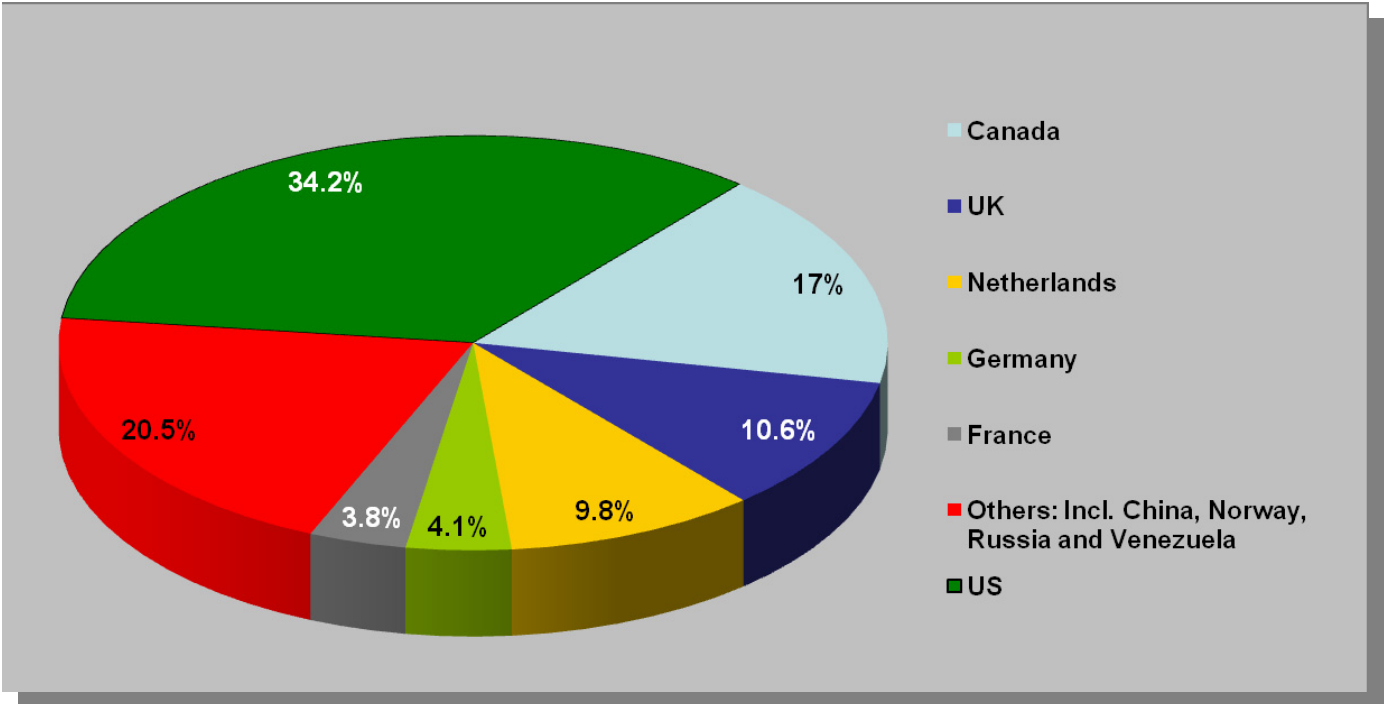
Table 2: Balance of Payments & External Debt (in US\$m, unless otherwise indicated)

	2004	2005	2006	2007	(%) chg	Projections	
					2004-07	2008/09 ¹	2009/10 ¹
Exports, f.o.b.	1,602	1,664	2,134	2,226	38.9	2,750	2,912
Imports, f.o.b.	3,546	4,246	5,077	5,789	63.2	6,301	6,489
Merchandise trade balance	-1,944	-2,582	-2,943	-3,563	-	-3,551	-3,577
Trade deficit (%) of GDP	-22.0	-26.5	-28.2	-31.6	-	-27.3	-25.9
Services (net)	572	607	628	441	-23.0	626	756
Tourism receipts	1,438	1,545	1,870	2,051	42.6	2,082	2,278
Current transfers (net)	1,446	1,578	1,749	2,040	41.1	2,147	2,297
Private remittances	1,892	1,935	2,088	2,385	26.0	2,071	2,212
Current account balance	-509	-1,071	-1,183	-1,743	-	-1,742	-1,559
As percent of GDP	-5.7	-11.0	-11.3	-15.4	-	-13.4	-11.3
Foreign direct investment (net)	602	682	882	866	43.8	792	772
FDI (% of current account deficit)	118.3	63.7	74.5	49.7	-	45.4	49.5
Foreign exchange reserves	1,865	2,170	2,318	1,917	3.0	1,706	1,767
FX reserves (in months of imports)	6.25	6.0	5.5	4.0	-	3.25	3.25
Total external debt stock	6,482	6,557	7,994	7,852	21.0	7,100	7,800
Debt stock (%) of GDP	73.3	67.5	76.6	69.7	-	54.5	56.5
Debt service ratio (%) ²	17.6	18.0	14.0	17.4	-	-	-

¹April 1 to March 31; ²Scheduled debt service (principal and interest repayments) as a percent of total exports.

Sources: IMF, International Financial Statistics, Euromonitor, World Bank and Jamaican authorities.

Chart 1: Main Destination of exports (percent of total 2007)



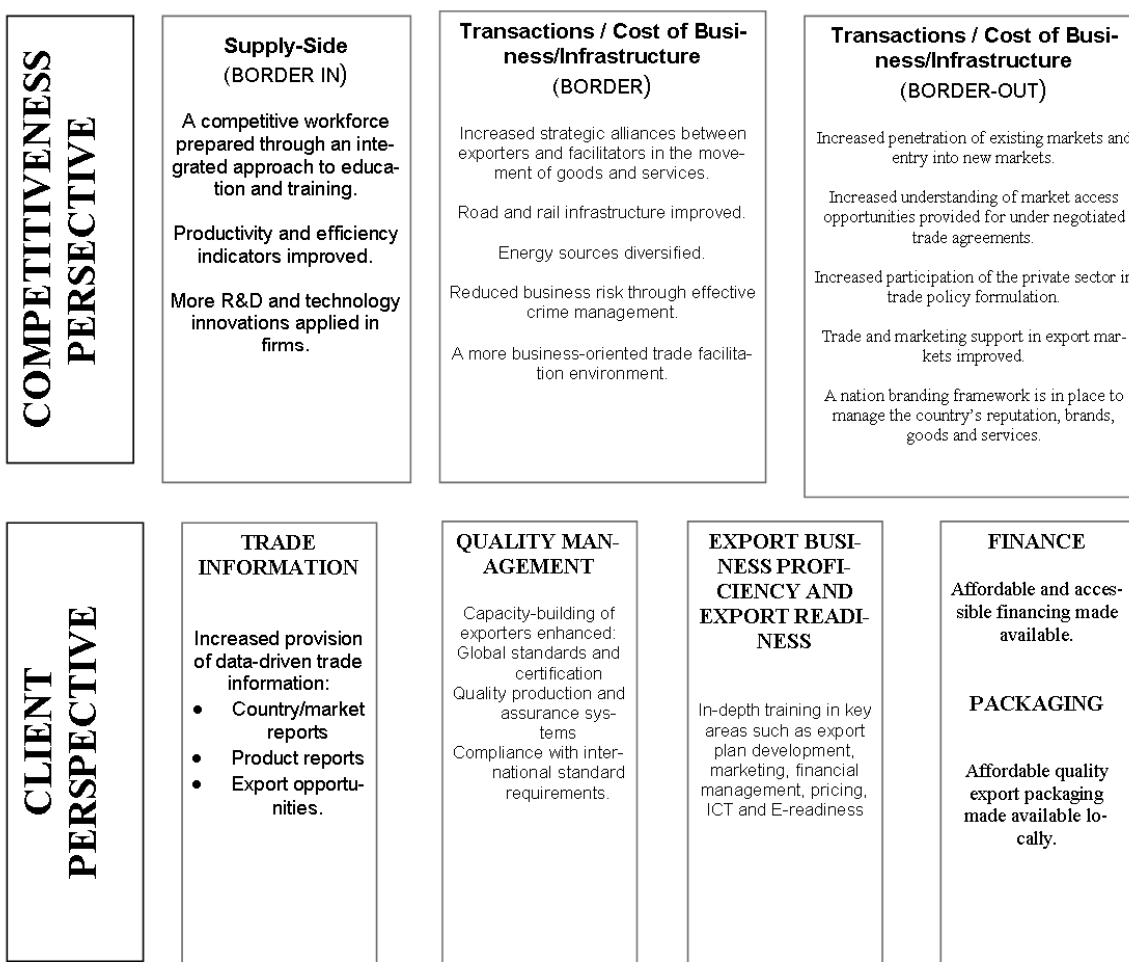
Source: IMF, Director of Trade Statistics

VISION

Jamaica is a leading per capita export country known for its commitment to creativity, innovation and exceptional quality.

DEVELOPMENT PERSPECTIVE

The export sector's contribution to GDP will increase from one-fifth to one-third by 2013. This will be reflected in increased employment and the improvement of the livelihoods of marginalised groups through greater diversification of the sector and by pursuing a path of a high value niche production.



Institutional Perspective

The Jamaica Export Council is a legally established entity that is adequately resourced to coordinate export policy, facilitate export capacity and manage the implementation of the Export Strategy.

Goal#2 Improving Export Performance

National Export Performance, 2002-2008 Goods

Despite some modest movement in economic growth between the 5-year period 2002-2008, Jamaica's export performance continues to be inconsistent.

- Total goods exports increased from USD1,117.3 million in 2002 to USD2,641.0 million in 2008.
- With the exception of the years 2002 and 2003, Jamaica's total goods export (in value) has steadily increased since the year 2000.
- While total import growth for partner countries increased in value by 16% (2003 – 2007), Jamaica's exports during that period increased by 17%.
- Despite Jamaica's exports as a percentage of the total value of world exports moving in pace with global imports, the country continues to lose market share to its competitors and slipped in world export ranking from 118 (2006) to 121 (2007).

To further illustrate, eight of the top ten export product groups grew at rates lower than the world rate of growth in export for the product; only beer and ethanol experienced growth rates greater than the world growth rates for the period.

Table 2.1: Growth Rates of Jamaica's Top Goods Exports (value), 2003 – 2007

	Product	Exported value 2007, USD thousand	Annual growth in value between 2003-2007, %, p.a.	Annual growth of world imports between 2003-2007, %, p.a.	Share in world exports, %	Ranking in world exports
	All products	2,223,961	17	16	0.02	121
1	Alumina	1,102,177	13	21	8.71	3
2	Light petroleum distillates	326,601	107	33	0.1	67
3	Aluminium ores (bauxite)	203,888	22	26	10.31	4
4	Raw sugar	100,504	8	18	1.48	11
5	Scrap Metal	76,456	183	21	0.39	32
6	ethyl alcohol	60,144	9	42	1.81	9
7	Rum	45,902	15	8	4.39	7
8	Beer	37,059	25	10	0.36	26
9	Coffee (not roasted)	27,797	-3	22	0.21	28
10	Yams	17,366	2	9	6.65	3
11	Aircraft parts nes	10,562	11	16	0.02	53
12	Bananas including plantains, fresh or dried	9,223	-13	9	0.12	43

Source: TradeMap (Data analysed for period 2003-2007)

Export movement has seen a corresponding shift in contribution to national GDP. Since 2003, there was a resultant decline each year except for 2004 and 2006 during which the lowest contribution was 14.6% (2003) and the highest 19.2% (2006). It is not all negative though. There has been consistent performance in some sectors, such as mining (bauxite, alumina and gypsum), limestone, some non-traditional crops (yams and fish), manufactured goods and furniture. Significant growth was recorded for mineral fuels, coffee products, rum and all other beverages¹. *The greatest declines were in apparel, tobacco, and cut flowers.*

Primary products constitute the largest component of Jamaica's exports. The National Export Strategy makes a compelling argument for the development of global value chains to ensure that Jamaica maximises from its exports, such as our traditional bauxite/alumina industry, where it is estimated that over 50% of our exports are commodity products with significant value addition outside of our shores. Consider also our valuable coffee exports, where only 10% is roasted and an even smaller percentage undergoes further value addition, as the majority is exported as green beans. There have been achievements in product diversification and a trend towards value addition as non-traditional exports now command an increasing share of total exports; moving from 20% of exports in 2002 to almost 30% in 2008. **But, there is still much to be achieved.** The point is reinforced by low value addition products like bauxite and alumina, which have constituted on average 63% of total exports (2002 to 2008),] as illustrated in the table (2.2) below.

Table 2.2: Export Product Mix (US\$M)

TOTAL EXPORTS	2002	2003	2004	2005	2006	2007	2008
	1117.3	1195.5	1404.5	1531.5	1983.4	2254.2	2641.0
Traditional exports:	868.8	931.1	1081.9	1160.0	1337.7	1500.4	1546.3
▪ Agriculture	55.0	55.9	56.6	25.6	46.4	42.3	31.8
▪ Mining	711.0	779.5	896.7	1021.2	113.2	1306.5	1364.5
▪ Manufacture	102.7	95.7	128.5	131.1	135.9	151.6	150.0
Non-traditional exports:	228.7	235.3	283.3	341.6	610.1	519.6	1094.7
▪ Food	82.7	94.4	90.3	88.4	94.2	92.1	122.7
▪ Beverage & Tobacco	48.9	25.9	32.9	44.5	49.2	52.6	49.6
▪ Crude Materials	5.0	5.9	27.4	18.8	104.0	81.3	25.2
▪ Other	119.3	108.9	132.4	189.7	362.5	527.8	897.3
Non-traditional exports as % of total exports	20	19	20	22	31	29.3	41.5
Ratio of traditional exports to total exports	78	78	77	75	67	68.3	58.5

Source: PIOJ, 2007

¹ One export category recording significant growth, but which is not sustainable was scrap metal.

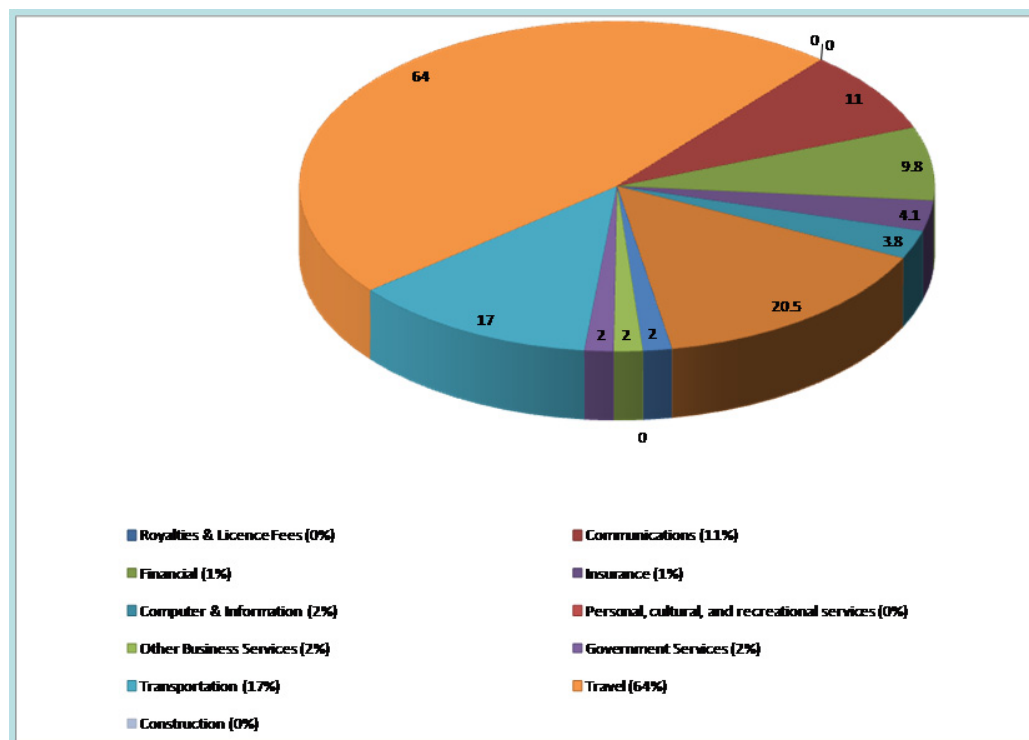
National Export Performance 2002-2007, Services

The relative sparse information on Jamaica's trade in services has been gleaned from the World Trade Organisation's Statistics database, which points out that Jamaica's export of commercial services has increased over the last five years². Although imports of services have increased as well, the trade balance has been favourable for the country.

Table 2.3: Jamaica's Trade in Commercial Services, 2003 -2007 (US\$M)

Service	Flow	2003	2004	2005	2006	2007
Commercial services (Services excl. government services)	Exports	2103	2262	2296	2613	2566
	Imports	1538	1677	1676	1969	2072
Transportation	Exports	474	497	451	459	447
	Imports	618	648	718	885	961
Travel	Exports	1355	1438	1545	1870	1834
	Imports	252	286	249	273	294
Other commercial services (Commercial services - Travel & Transport)	Exports	274	327	299	284	285
	Imports	667	743	709	811	817

Figure 2.1: Average Share of Jamaica's Export Services by Category 1997-2002



Source: CARICOM Central Banks – compiled and graphed by A-Z Information Jamaica Limited (from the Services Sector Study, Jamaica)

² 2002 data was not available.

The National Export Strategy in the context of Jamaica's Trade Agreements

Multilateral Trade Regime

Jamaica has been actively engaged in the multilateral trading environment since 1963, when it joined the General Agreement on Tariffs and Trade (GATT). Jamaica acceded to the WTO in 1995, following the Uruguay Round of Agreements, which not only established the WTO, but also launched a new era of multilateral trading arrangements.

In 1991, Jamaica began the implementation of several trade reforms, starting with the removal of all quantitative restrictions on imports and exports.³ Since 1997, tariffs have also been reduced. As a member of CARICOM, Jamaica applies a Common External Tariff (CET) on non-CARICOM exports, which ranges between 5-20% for products and 0-5% on capital goods (WTO, 2004; WTO, 2007; World Bank, 2003).

Jamaica has made commitments under the General Agreement on Trade in Services (GATS), in respect of the following industries – tourism, business, education, health, recreation, transport, and financial services (despite participating in negotiations concerning the financial services sector, Jamaica has not ratified the GATS Fifth Protocol on Financial Services) (WTO, 2004).

New Trade Policy

In 2002 the Government adopted a New Trade Policy in response to forces of globalisation and liberalisation. The Policy has three objectives: (i) expand and diversify exports by facilitating growth of domestic capital; (ii) steadily reduce the ratio of imports to exports; (iii) increase the flow of net positive returns from investment (MFAFT, 2001).

The National Export Strategy is aligned to the New Trade Policy, adopting the objectives of expanding and diversifying exports, as well as reducing the trade deficit. The development and implementation of the export strategy identifies the priority sectors best suited to diversify and expand exports, as well as the issues to be addressed in the business and trade environment to *facilitate the this transformation*.

Trading Agreements and Market Access

The specific trade agreements that have been negotiated are brought to bear in the strategy design as the basis for selection of export markets, for example the negotiated Economic Partnership Agreement, EPA that presents a myriad of opportunities for Jamaica to access the US\$64 trillion EU market. Preliminary research shows that there is a growing middle class taste for the exotic Caribbean products in several of the newer member states of the EU. Also, trade promotion and information strategies that were based on trade agreements provide a framework for agencies like Jamaica Trade and Invest, working in collaboration with the industry bodies like the Jamaica Exporters' Association to unearth the relevant

³ There is one exception. Quantitative restrictions were instituted in 1999 against the importation of Chlorofluorocarbons (CFCs), in order to satisfy Montreal Protocol treaty obligations (WTO, 2005:49).

market information (market size, value and access requirements, language, labelling, packaging and distribution channels), necessary to secure niche markets for exportable Jamaican products and services in short order.

Impact of Trade Agreements on Export Performance

Jamaica has experience strong export performance under negotiated trade agreements.

CARIBCAN: Over the period 1992 to 2002, trade between Canada and CARIBCAN beneficiaries has grown significantly, from CAN\$329 million to CAN\$716 million, an increase of over 200%. CBI: Jamaica's imports under CBI increased significantly, by approximately 62%, to US\$246 million. This surge in exports to the US under the CBI was attributable primarily to the exports of fuel-grade ethanol.

The vision for each sector serves as the basis for guiding trade policy positions for current and future negotiations, against the background of the erosion of preferences under the CBTPA, CARIBCAN and Cotonou Agreements, which may result in loss of market share for traditional (and non-traditional) product exports. The erosion of such preferences, therefore, demands enhanced competitiveness on the part of our producers, and the challenge lies in selecting and engaging in those sectors and industries which are more efficient, and which generate equal or higher levels of employment resulting in increased market share for Jamaican products (Bloom et al, 2001).

Goal #3 Achieving Global Export Competitiveness

Against the context of globalisation in a world without borders, Jamaica as a small emerging economy, embraces global trade with a mix of supreme confidence in its products and services and a pragmatic acceptance that it does not have the capacity or economies of scale to stake out a competitive edge as a volume producer in the global marketplace. Rather, the position has been postulated that the nation best pursues a path of a **'high value niche producer'**, as has been demonstrated over the years in the intricately produced, top of the line, well-packaged and unique coffee, sauces, spirits, juices, fashion, software, medicines such as CANASOL and the nutraceuticals, as well as in the professional services provided by Jamaican nurses, doctors, accountants, athletes, entertainers, among others. Those who hold to this *'high value niche producer'* position, argue that value lies not only in the price but in the 'quality uniqueness' of the design, materials, presentation, packaging and branding, which serves the purpose of making Brand Jamaica products and services synonymous with quality worldwide and distinct global relevance and appeal.

Assessment of Jamaica's Global Competitiveness

Jamaica's global competitiveness rankings have declined in recent years. The Global Competitiveness Index (GCI), provides a holistic ranking based on those features of the Jamaican economy which positively or negatively affect competitiveness.

	2004-05	2005-06	2006-07
Global Competitiveness Index (GCI)	65 (/104)	70* (/117)	67 (/125)
Macroeconomic Stability sub-index	83/104	99/117	118/125
Business Competitiveness Index (BCI)	52 (/93)	53 (110)	54 (/121)

Source: WEF, various years

The statistics bear out that Jamaica's overall competitiveness in the global environment has been improving (taking into consideration variation in sample size of the various surveys, as well as variability in sub-indices composition).⁴ Subsequent indicators provide further explanations of the improved performance.⁵ While there has been deterioration in the macroeconomic stability sub-index, there have been improvements in the Business Competitiveness Index ranking.

Competitiveness Performance: Sector Analysis⁶

The International Trade Centre Competitiveness Index groups exports (products) by global performance level in the categories of *Champions*, *Underachievers*, and *Achievers in Adversity and Declining Sectors*.

The *Champions* category classifies national exports that experience growth in sectors for which global import demand is increasing. The *Underachievers* category classifies national exports that though experiencing growth, are losing market share to competitors in product groups with increasing global demand. *Achievers in Adversity* classifies national exports that while are experiencing growth, global import demand is on the decline. And, *Declining Sectors* classifies national exports that are losing market share in globally declining sectors. The 2006 index shows that Jamaica had 3 *champions* (which commanded the highest share of total national exports at 8.2%), 4 *underachievers*, 5 *achievers in adversity* and 8 *declining sectors*. The majority of Jamaica's exports (13 out of the 21 HS4 product groups examined or 61%) were thus in the *declining sectors* and the losers in growth sectors (*underachievers*).

⁴ See note attached.

⁵ Methods of calculation must also be considered. The WEF changed calculation methods in 2003

⁶ This analysis of Jamaica's exports between 2001 and 2006 uses the TradeMap tool. COMTRADE statistics were used for the calculations of market and world shares. Jamaica's export figures are based on mirror figures from importing countries because Jamaica does not report to COMTRADE.

Of particular note is that the *underachievers* group commanded the second largest share of national exports at 4.5% as well as the largest world market share of exports at 7%; whilst the *Achievers in adversity* group commanded 0.0% of world market share of exports and 0.6% share of national exports.

Moreover, all products classified as *champions* were traditional export products and fall within the mining/manufacturing sector (see table 6). Other traditional exports amongst the top ten national exports (namely banana and coffee) were from the agricultural sector and, *were losers in declining markets*. The majority of the *underachievers* and losers in declining markets tended to be non-traditional exports but spanned across a variety of sectors including agriculture/food, crude materials, apparel and beverages.⁷ The *Achievers in Adversity* consisted of both traditional and non-traditional export products and sectors. The performance of product groups was taken into account for the sector selection exercise to choose sectors of focus for the first phase of the NES.

⁷ ESSJ 2006 6.4

National SWOT Analysis

<p>STRENGTHS</p> <ul style="list-style-type: none"> ▪ Supply Side Issues (Border-In) ▪ Sophisticated infrastructure, especially telecommunications and transportation ▪ A range of institutions and programmes supporting private sector development (SMEs in particular) ▪ Relatively high levels of e-readiness, e-governance and legislation for electronic transactions among institutions ▪ Well-trained, English-speaking labour force (general) ▪ Possesses the attributes of successful professional service exporters (e.g. India) ▪ Entrepreneurial culture <hr/> <ul style="list-style-type: none"> ▪ Business Environment (Border) ▪ Upgraded infrastructure (ports, roads, telecommunications) ▪ Competitive REER ▪ <i>Well-developed</i> legal & regulatory framework and incentive regime. <hr/> <ul style="list-style-type: none"> ▪ Demand Side Issues (Border-Out) ▪ Recognized country/product brand, in particular for niche products, such as coffee. ▪ Proximity to the US and other key export markets ▪ Favourable trade agreements <hr/> <ul style="list-style-type: none"> ▪ Issues of Development ▪ Political stability and democratic government. ▪ Strategic geographic location (to major markets and for international transport). ▪ Strong FDI performance and resultant existing linkage opportunities 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> ▪ Supply Side Issues (Border-In) ▪ Low labour productivity and relatively poor total factor productivity ▪ Lack of skill set to match current and emerging needs ▪ Small market deters market seeking FDI (with exception of recently privatized sectors, such as Telecommunications) ▪ Service deficiencies to the sectors and clients; Many private sector associations and sector specific associations are weak and in need of institutional strengthening and funding <hr/> <ul style="list-style-type: none"> ▪ Business Environment (Border) ▪ Lack of enabling macro-economic environment ▪ High transaction cost of doing business ▪ Low access to capital, including venture capital; high cost of capital. ▪ Restrictive labour laws <hr/> <ul style="list-style-type: none"> ▪ Demand Side Issues (Border-Out) ▪ Weak response to trade opportunities and risks. ▪ Changing global trade regime (erosion of preferential access and opening up of markets to competitors) ▪ Limited stretch of (positive) brand reputation across all export goods and services. <hr/> <ul style="list-style-type: none"> ▪ Issues of Development ▪ High crime rate increasing cost of doing business ▪ Poor urban/rural and regional planning
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> ▪ Supply Side Issues (Border-In) ▪ High levels of FDI facilitate technology transfer and further (infrastructural) development ▪ Development of Professional services export. ▪ Existing and emerging technological innovations for improving productivity and efficiency. <ul style="list-style-type: none"> ▪ Demand Side Issues (Border-Out) ▪ Demand for resource-based and other raw materials exports in emerging markets ▪ Demand for cultural and creative goods and services that are uniquely Jamaican. ▪ Erosion of preferential trade agreements ▪ Trade agreements – CSME, EPA, which may foster increased intra-regional trade 	<p>THREATS</p> <ul style="list-style-type: none"> ▪ Supply Side Issues (Border-In) ▪ Work-force attitude/culture <ul style="list-style-type: none"> ▪ Demand Side Issues (Border-Out) ▪ Investors' favourable perceptions of other business destinations (for example, Mexico, Puerto Rico, Malaysia, Thailand, Hong Kong, China) ▪ Erosion of preferential trade agreements ▪ Low cost of labour in emerging markets <ul style="list-style-type: none"> ▪ Issues of Development ▪ Dependence on non-renewable, traditional energy sources, especially in face of rising oil prices.

Conclusions

The Jamaican economy is the most diverse and sophisticated economy in the English speaking Caribbean; and as such requires economic planning that ascribes to the new global context that requires high levels of responsiveness to the imperatives and challenges of globalisation. The Vision 2030 Plan squarely positions the National Export Strategy in the matrix of Jamaica's development agenda and is indicative of the government's comprehensive approach to development.

The NES is also a model of modern public-private sector partnership, as it fits into other partnership initiatives such as the National Planning Summit and the Social Partnership discussions that include the labour unions and Opposition party.

Executing the National Export Strategy will require, (i) more effective and efficient allocation and use of recurrent funds, (ii) private sector investments, and (iii) better planning and coordination among the producers/exporters and the relevant agencies of the State to reduce duplication, emphasize quality and ultimately, realize the vision of the NES.

Jamaica's export performance has been influenced/characterised by:

- Over-reliance on traditional exports, which are declining in market share yet still constitute (68%) of total goods exported, and continued dominance of a few commodities (bauxite and alumina (58%), sugar (5.6%)), coffee, and rum;
- Recorded services export sector dominated by tourism;
- Low value addition and lack of differentiation in traditional and non-traditional exports;
- Overdependence on preferential market access (under the ACP/EU, CBTPA, CARIBCAN agreements) that has led to uncompetitive industry practices, coupled with a lack of market diversification and penetration to potential emerging markets;
- No integrated national framework for export development across key sectors and institutions (both public and private).

In the current global trade environment, a fragmented approach to export development is no longer appropriate and will not lead to enhanced competitiveness and sustainable improvement in Jamaica's export performance.

The National Export Strategy therefore seeks to comprehensively address these issues, by:

- Positioning the export sector to contribute to Jamaica's overall development within the context of Vision 2030 Jamaica by addressing international competitiveness;
- Removing impediments to competitiveness within the export sector (includes capacity development and diversification, human capital development, cost of doing business and export facilitation, and market access and promotion) by harnessing Jamaica's creativity and innovation;

- Allocating scarce resources to the priority sectors and business support services that enable current exporters to export more, potential exporters to begin exporting and aspiring exporters to move from idea to execution;
- Engaging key stakeholders in the trade support network in a participatory approach to formulate and execute a national export strategy within a formalised, institutional arrangement.

Section 2: Developing the National Export Strategy- the Process

In a highly collaborative and multi-sectoral way, the NES seeks to galvanise all stakeholders - public and private - to agree on a set of common objectives, backed by coordinated actions; mindful that the limited resources available for export development are utilised optimally; and that the actions executed are not only short-term, but also long-term, i.e. a balance is struck between commercial and developmental actions.

Traditionally, nations have pursued export competitiveness by focusing on issues relating to trade policy, such as *securing market access, negotiating preferential treatment through trade treaties and protocols, and protecting local industries*. The NES suggests a broadening of the focus to embrace a development paradigm given the imperatives of globalisation, where the ultimate objective is to improve conditions under which enterprises do business, thereby contributing to economic and social development.

Jamaica's National Export Strategy is benchmarked on the Strategy Development Model of the International Trade Centre (UNCTAD/WTO) in Geneva, Switzerland, which has been our sponsor in this initiative. Consider therefore the following four perspectives that are captured by the National Export Strategy, which seeks to include all stakeholders in a vibrant and highly successful Jamaican Export sector:

The Development Perspective

"An achieved vision of how all stakeholders, including taxpayers, politicians, government ministries, labour unions, NGOs and the donor community perceive that the strategy meets their needs"

The Competitiveness Perspective

"An achieved vision of how business associations, advocacy groups, potential foreign buyers and investors perceive that the strategy meets their needs."

The Client Perspective

"An achieved vision of how current, potential and aspiring exporters, and other key enterprises and players in the value chain perceive that the strategy meets their needs."

The Institutional Perspective

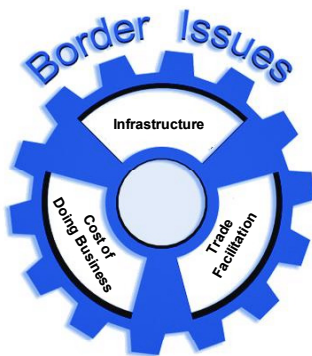
“An achieved vision of how each member of the national trade support network perceives its relevance, in terms of how the strategy consolidates/reinforces its position, by facilitating its work and enhancing its capacities and competence.”

The Competitiveness and Development perspectives are further defined as the functional gears in the strategy development, and are illustrated below:



Border-In (supply-side) issues refer to:

- Capacity development
- Capacity diversification
- Skills and entrepreneurship development



Border (business environment) issues refer to:

- Infrastructure
- Trade facilitation
- Cost of doing business



Border-Out (demand-side) issues refer to:

- Market access
- In-market support
- National promotion



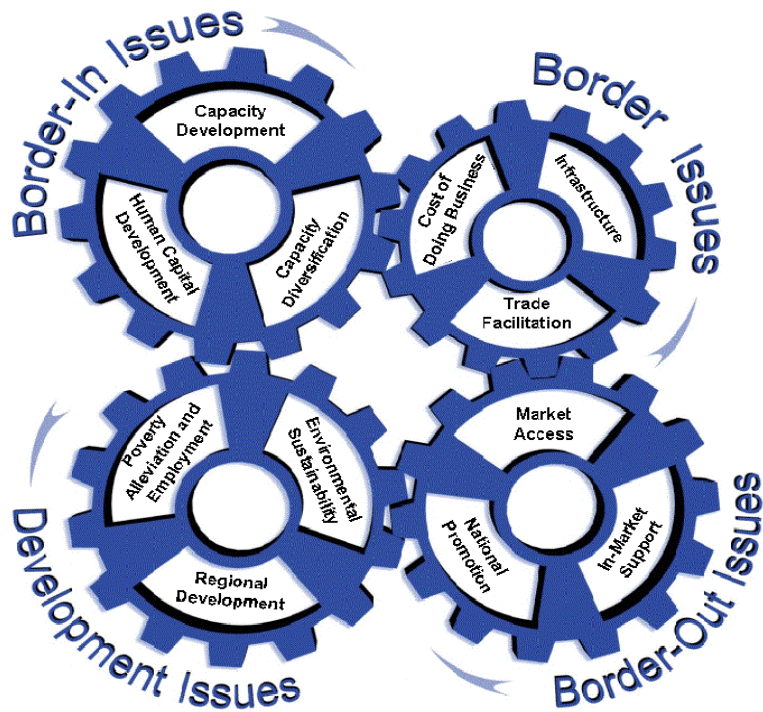
Development Issues refer to:

- Poverty alleviation and employment
- Regional development
- Environmental sustainability
- Gender equality

The Four Functional Gears of the Strategy

The three competitiveness gears of strategy must reinforce each other, while powering the development gear.

Result:
A combined competitiveness-development focus



Priority Sectors of the National Export Strategy

At the start of strategy design process in April 2008, stakeholder groups working with this paradigm of a '**combined competitiveness-development**' focus, set about the challenging task of developing strategies and action plan around eight specific priority export sectors, that would form the bedrock of the overall national strategy. Within a year, these groups met to validate the Strategy, the final hurdle before systematic execution according to strategy.

These are the priority sectors:

1. Agro-processing (Food & Beverages)
2. Aquaculture
3. Coffee
4. Education
5. Entertainment
6. Information Communication Technology (ICT)
7. Fashion
8. Minerals and Mining

These are the cross-sector issues addressed by the National Export Strategy

1. Human Capital Formation and Development
2. Innovation & Technology
3. Cost of Business (Energy & Security)
4. Trade Facilitation
5. Infrastructure
6. Business & Export Competency
7. Finance
8. Quality Management & Packaging
9. Trade Information
10. Trade Promotion
11. Nation Branding

Sector Prioritisation

The National Export Strategy may also be described as **targeted or focused**. The client perspective of strategy design encourages the focus on specific sectors, rather than trying to address all export sectors. Arising from a prioritisation exercise, which engaged several stakeholder groups, the following sector prioritisation grid was developed:-

Sectors	Development impact (e.g. Employment)	Value addition & export potential	Overall Goal Fit
Agriculture	H	H	H
Agro-processing (Food & Beverages)	H	H	H
Aquaculture	M	H	M
Coffee	M	H	H
Education	M	M	H
Entertainment (Inc. Dance, Drama, Film, Music)	H	H	H
Fashion, Jewellery and Accessories	M	H	M
Information, Communications Technology (ICT)	H	H	H
Manufacturing	H	M	H
Mining	M	M	H

Key: H- high, M- Medium, L – low

How the Strategy Addresses the Manufacturing, Agriculture and Tourism Sectors

Prioritisation is driven by a market rather than a production orientation. The selection is confirmed by other programmes and studies that have also recognised these groups. It should be pointed out that whilst all manufacturing sub-sectors have not been captured in the grid, it was the considered view of the strategy work groups that the priority issues pertaining to the Manufacturing sector were effectively articulated and addressed in the cross-sector strategies, and as such, a separate strategy would not be developed.

Meanwhile, a related initiative has been conducted to develop a strategy for the Agriculture sector covering fruits and vegetables, roots and tubers, as well as herbs and spices. This strategy is being integrated into the National Export Strategy, but was developed by another related project employing a wider approach and involving additional international partners.

As it relates to tourism, the Tourism Master Plan addresses the medium to long term plans for this sector.

It should be noted that while the strategy addresses a specific number of priority sectors at this stage, it is expected that other sectors will be incorporated as the Strategy implementation process evolves.

Features of the National Export Strategy

A Public-Private Sector Partnership (PPP)

The design of the Export Strategy required the participation of the traditional export partners and strategy makers in government, but the critical inputs came from the private sector. The strategy development was therefore a strong PPP collaboration, where the private sector provided most of the content through consultations in which the relevant public entities also cooperated.

The Trade Support Network

The agencies involved included those institutions that drive and influence policy, as well as the service providers. Under implementation, agencies will therefore already be aware of the opportunities and constraints, while the process would have engaged all the players in the full scope of export development, facilitation and promotion activities.

As in some countries with successful export strategies such as the USA and some developing countries like Romania and the Philippines, where the legally constituted entity with primary leadership is established to execute the strategy, Jamaica also seeks to set up a similar model with sustainable structures and processes.

Value Chain and Value Options

The national export performance highlighted the need to diversify our exports towards higher value products based primarily on further processing. The growing trade deficit pointed to the need to reduce imports, which may be achieved through greater domestic linkages. For these and other reasons, the approach of developing value chains for each sector and assessing these against five value options was employed.

For each of the priority sectors, detailed sector strategies were designed using value chain analysis, which identified options to:

- Acquire value by improving efficiency within the national component of the value chain (and thereby enhancing the sector's competitiveness), such as group sourcing to reduce the cost or eliminating an intermediary;
- Retain greater value by reducing leakage from the national portion of the value chain, for example sourcing locally what is now imported;
- Add value by developing new product lines and/or extending the national component of the value chain, such as new beverage products;

- Create value by increasing production of existing or new product lines or by entering the value chains of related sectors, like creating film products from the dance and drama sectors; and
- Distribute value within the economy by increasing the sector's direct contribution to such national development goals as employment generation, poverty reduction, rural and regional development, gender equality and sustainability of the environment.

This assessment using these five value options ensures that the strategy and action plan remain focused on the premise that the sector and national objectives may be attained with a focus on increasing value.

Stakeholder Perspectives and Strategic Considerations

The different stakeholder perspectives and the relative importance of each were considered with the result being a weighting of each. This ensures that the resources are focussed on the area of highest prioritisation rather than being spread across many areas, ensuring results and impact. Below is the result of the prioritisation.

The weighting for each of the perspectives is outlined below:

- The Development Perspective: 10%
- The Competitiveness Perspective: 40%
- The Client Perspective: 25%
- The Institutional Perspective: 25%

These formed the basis of the Monitoring & Evaluation of the Strategy using the balanced score card methodology. These weightings are subject to change.

Each stakeholder perspective is also supported by several strategic considerations that are also aligned to the vision and objectives of the export strategy.

Within each of the four general framework areas (perspectives), the strategic considerations were further prioritised.

Strategic considerations of greatest importance are: employment, capacity diversification, human capital development, transaction costs, security, in-market support, policy coordination and strategy management. The most important service needs of the export client were in the areas of business competency and finance. The table below shows the priority levels of all the strategic considerations.

Development Perspective		Competitiveness Perspective	
<i>Strategic Consideration</i>	<i>Priority</i>	<i>Strategic Consideration</i>	<i>Priority</i>
Employment	1	Capacity Development	2
Environment	3	Capacity Diversification (Innovation and Technology)	1
Geographic distribution	3	Human Capital Development	1
Poverty reduction	2	Infrastructure Development	2
Gender	3	Trade Facilitation	2
		Transaction Costs	1
		Security	1
		Market Access	3
		In-market Support	1
		National Promotion	3
Client Perspective		Institutional Perspective	
<i>Strategic Consideration</i>	<i>Priority</i>	<i>Strategic Consideration</i>	<i>Priority</i>
Client Focus		Policy Coordination	1
▪ Business Development & Export Readiness	1	Strategy Management	1
▪ Finance	1	Capacity Development	2
▪ Trade Information	2	Service delivery coordination	1
▪ Quality Management	2		
▪ Packaging	2		
▪ Branding			

Where 1= most important, and 3 = least important.

SECTION 3: CROSS-SECTOR STRATEGIES

Strategy-making is largely a matter of applying common sense within a commonly understood and accepted framework in a process where the public sector establishes priorities among sectors and the private sector establishes priorities within sectors. This is especially important when it comes to addressing cross-cutting issues that impede international competitiveness and export growth, where integrated responses are required. This section is a compilation of the macro, cross sector and sector strategies identified. NOTE: Where issues are to be addressed by other national programmes there are no corresponding activities in the Action Plans.

1. Human Capital Formation and Development

The Context: At the heart of the global competitiveness agenda is the critical matter of human capital development. This premised on the creation of a confident educated Jamaican population, the construction of a world-class Jamaican workforce driven by creativity and innovation, and the systematic reversal of the brain drain.

Significant concerns have been expressed about the productivity of the Jamaican workforce. Some argue that there is an absence of a productivity culture, meaning the general population is yet to grasp the connection between the individual value inputs of workers and productivity as a basis for competitiveness and improved living standards.

This is evidenced by, among other things, demands for wage increases that bear no relationship to labour productivity. Furthermore, simple behavioural adjustments that could substantially improve productivity are ignored at the level of the individual worker and employer (punctuality, good record of attendance and absenteeism) as well as governments (e.g. the need to address the impact of traffic congestion on productivity).

Real wages are also rising faster than labour productivity. Unit labour costs and real wages have been growing faster than labour productivity in Jamaica over extended periods. This in part, is attributable to the competitive collective bargaining environment. From 1994 to 2001, unit labour costs increased twice as fast in Jamaica as in its major trading partners, without clear evidence of a comparable increase in labour productivity.

The Issues

- No policy regarding establishing an education and training system that supplies the skills needed by sectors.
- Output/employment is not being considered when determining where to channel funds for education.
- Low investments in education, skills and health which prevents the achievement of improved and sustained worker productivity.
- Unavailability of skilled workers and concomitant unavailability of middle to upper level managers.
- No promotion of productivity in the workplace, in key sectors or at a national level.

- No policy regarding the ‘brain-drain’ of qualified human resources.
- Technology sector has been concentrated in data entry/capture (low level skill sets) and not on high-skill set.

Recommendations

Enhanced human capital development resulting from adopting a strategic and integrated approach to training, education, labour and resource allocation

- Develop policy to ensure that the education system meets the requirements of the workforce.
- Improve the fit of skills and education training towards target export sectors and supporting industries through a strategic and unified national effort to:
 - Develop Curricula based on current and forecasted employer needs and
 - Proactively involve industry in reviewing existing curricula and design of new ones.
- Advocate for further outlay in human capital (and infrastructure) by the government to build a more advanced skill set to attract higher value added investment, which will achieve greater productivity and competitiveness.
- Strengthen IT education at the secondary level to adequately supply the university level.
- Focus on improvements in basic educational areas, such as mathematics (and English).
- Improve foreign language training.

Improved productivity in all sectors;

- Develop a permanent institutional framework for identifying, **promoting** and reviewing national values and attitudes to instil a productivity culture in Jamaica (from the company to institutional level)
- Facilitate the development of performance-based pay structure/schemes for key sectors and at the firm level, and promoting move to productivity based pay by companies.

Increased productivity through retention of human resources

- Support the creation of an improved business environment to help promote better quality jobs for graduates and fostering entrepreneurship.

Human Capital Development	Measures	Targets	Initiatives
<i>Enhanced human capital development that meets the human resource requirements of the key sectors</i>	Number of training and education programmes that are linked to actual and projected labour needs (in priority/target industries)	9 such programmes by year 3 (representing at least one such programme for each priority sector)	<ul style="list-style-type: none"> ▪ A strategic and integrated approach to training and education that is learning-centred featuring: <ul style="list-style-type: none"> ○ Development of curricula for each programme based on current and forecast sector and employer needs and by proactively involving sectors/industry in reviewing existing curricula and design of new ones. ○ Facilitate the registration and/or accreditation of each programme by relevant authority. ○ Design exit surveys and assessments for programme tracking.
<i>Increased productivity across priority sectors.</i>	Productivity index or productivity indicator by sector	Benchmarks to be established in Y1	<ul style="list-style-type: none"> ▪ Provide methodologies, mechanisms and support for firms and sectors to benchmark to international standards, such as quality of workforce technology applied, etc. ▪ Facilitate the development of performance-based pay structures that firms may adopt, which foster the move to productivity based pay. ▪ Provide technical assistance to firms to select and implement the structure that best suits their enterprise ▪ Develop a permanent institutional framework for identifying, promoting and reviewing national values and attitudes to instil a productivity culture in Jamaica

2. Innovation and Technology

The Context: Achieving increased value of exports and transforming the profile of exports to reflect greater portions of value added products will require the critical expanded capacity to diversify production and delivery of goods and services.

Capacity diversification deals with the value option of creating value where new product lines are developed or new sectors are entered [for target sectors]. Innovation in products and services as well as technologies and methodologies are critical to fostering capacity diversification.

Major inhibitors are (i) lack of investment in science and technology, (ii) lack of information on trends that match Jamaica's actual and potential competitive advantage, as well as (iii) challenges to financing the implementation of diversification plans.

Investment in Science and Technology is critical to the success of any country and is a crucial plank in driving competitive advantage. Jamaica spends very little in Scientific and Technological (S&T) pursuits. This is in the order of 0.4% of GDP, a figure which is low even by Latin American standards, and well behind expenditure ratios in S&T in most OECD and East Asian countries. In fact, Jamaica's innovation system has so far played only a marginal role as a source of innovation and productivity growth. Diversification is often driven by market demands and trends, and requires research and product development for new

products and services, with corresponding investments in quality requirements, packaging, labelling, plant and infrastructure improvements. This application in S&T should be based on innovations driven by market demands and trends that both foster and harness Jamaica's competitive advantages.

The extent to which there are linkages within and among sectors, based on potential to extend value chains, may also generate opportunities for diversification. On the other hand, the absence of these linkages and efforts to foster these may stifle innovations that lead to diversification.

Issues

From indications generally, the following summarises the main issues identified:

- Inadequate Investments in Science and Technology institutions that are geared to priority productive sectors (such as agro-processing and ICT) and supporting sectors (such as packaging).
- Inability to finance those costs associated with the new products and new lines.
- Limited availability of talent/ skilled persons trained in product development [and diversification].
 - Not enough being channelled into development towards shelf life extension for processed foods
 - Large segments of Jamaican enterprises lack adequate product design capabilities, process reconfiguration and production organisation that will give them a competitive edge even in niche markets.
- Not enough linkages and clusters within and among sectors, or value chains, to generate opportunities for diversification and joint ventures.
- There is inadequate opportunity identification based on market information that results in limited market-driven innovation towards diversification. Companies are not focussed in this area typically, but also there is no monitoring and sharing of such opportunities information by trade support network's service delivery institutions to provide these to firms.
- There is no national promotion with related support, such as incentives like a tax credit for product development aimed at fostering increasing innovations [that lead to diversification].
- Industrial and technical development functions and services (former JIDC function) such as prototype development and testing for commercialising through divestment are no longer provided.

So despite, proactive innovations in a few areas, there are weaknesses in transitioning these into commercial success based on industrial development gaps, for example moving from tissue culture to plantlets in commercial operations successfully.

- No entrepreneurial support for new ventures to be established to commercialise innovations, where existing enterprises do not exist or are not able or interested to take on new innovations (and no supporting entrepreneurial drive linked to innovation)

Recommendations

Increased focus and application of research and development and of technology innovation in export sector

- Allocate adequate resources to the sectors to strengthen and facilitate research and new product development capabilities.
- Develop active public and private partnerships with research and development institutions to lead the innovation process.
- Implement policies and programmes to strengthen and accelerate the country's capacity in technology generation, adoption and transfer.
- Initiate public and private-sector partnerships for funding of adaptive research.
- Promote the increased application of information and communication technology (ICT) to the export sectors
- Encourage greater use of modern and appropriate equipment and techniques.
- Encourage the creation of linkages/clustering within and among the sectors to benefit from joint ventures and other means of cooperation.
- Expand the remit of the SRC to embrace/support the entire export sector.
- Foster improved direction in carrying out research on new and high-value niche products which may be added to the mix of products being produced, manufacturing or cultivated (value added) – by engaging the SRC and private sector in greater dialogue and needs awareness.
- The coordination of sector responses to product development opportunities in the value chain best addressed at this level

Increased investment (and re-investment) ratio into productive capacity

- Review current incentives regime (in the context of high yield on GoJ debt) with a view to enhancing the existing suite so that it is more attractive than borrowing from the GoJ and encourages firm's reinvestment in capacity diversification.
- Support initiatives related to reduction in GoJ spending and debt levels.

Improved market information that drives innovation and diversification

- The production of market reports on new product opportunities and guidelines on exploiting these

- The delivery of group and firm interventions (through workshops, counselling and advisory services) to communicate and facilitate the opportunities.

Capacity Diversification	Measures	Targets	Initiatives
Increased focus and application of research and development and of technology innovation in export sector	# of new product developments (from collaboration) that are registered # of products improved	Beverages: 5 ICT: 2 Agro-processing: 3 Education: 1 Aquaculture: 2 ICT: 2 Agro-processing: 3 Education: 1 Aquaculture: 2 Mining:	<ul style="list-style-type: none"> ▪ Implement policies and programmes to strengthen and accelerate the country's capacity in technology generation, adoption and transfer. ▪ Develop active public and private partnerships with research and development institutions to lead the innovation process. ▪ Initiate public and private-sector partnerships for funding of adaptive research. ▪ Encourage the creation of linkages/clustering within and among the sectors to benefit from joint ventures and other means of cooperation. ▪ Expand the remit of the SRC to embrace/support the entire export sector. ▪ Allocate adequate resources to the sectors to strengthen and facilitate research and new product development capabilities. ▪ Foster improved direction in carrying out research on new and high-value niche products which may be added to the mix of products being produced, manufacturing or cultivated (value added) – by engaging the SRC and private sector in greater dialogue and needs awareness.
	Number of firms introducing new products and services Number of firms that improve existing products and services	10 45	<ul style="list-style-type: none"> ▪ Encourage greater use of modern and appropriate equipment and techniques. ▪ Provide project support for new product/service development and diversification
A coordinated response by sector players to new product development	# of value options being applied	(by sector – as per sector milestones)	<ul style="list-style-type: none"> ▪ The coordination of sector responses to product development opportunities in the value chain best addressed at this level (Specific initiatives as identified by sectors in respective strategy documents)
To increase investment (and re-investment) ratio into productive capacity	Value of (re)investment in the productive sector	(baseline required)	<ul style="list-style-type: none"> ▪ Review current incentives regime (in the context of high yield on GoJ debt) with a view to enhance the existing suite so that it is more attractive than borrowing from the GoJ and encourages firm's reinvestment in capacity diversification. ▪ Advocate for incentives that provide tax deductions for reinvestment into capacity development and diversification. ▪ Support initiatives related to reduction in GoJ

			spending and debt levels.
<i>Improved market information that drives innovation and diversification</i>	Number of product/market opportunity guides developed per year # of group interventions	1 for each priority sector 1 for each priority sector	<ul style="list-style-type: none"> ▪ The production of market reports on new product opportunities and guidelines on exploiting these ▪ The delivery of group and firm interventions (through workshops, counselling and advisory services) to communicate and facilitate the opportunities.

3. Transportation

Air

- Unavailability of air cargo space to transport produce directly to some markets (e.g. Canada) resulting in numerous transshipments and handling points, and corresponding increased cost and damages.
- Closure of the cold storage facility at the Norman Manley Airport impacting negatively on transporting fresh and refrigerated produce.
- Prohibitive air cargo rates limit markets or result in high costs to get the market (shrinking margins).
- Challenges with opening hours of air cargo service providers which negatively impacts produce being transported from far distances.
- Lack of understanding of transporting “hazardous” material by air.

Road

- Traffic congestion impacting negatively on time and motion.
- Poor state of road infrastructure which connects to the production centres (farms) and poor accessibility on arterial roads mainly during inclement weather [reduces the quantity of (farm) goods transported or arriving in the desired state].

Rail

- Unavailability of rail service to other than the bauxite companies [contributes to issues related to road transport – further compounding them]

Recommendations

Increased strategic alliances to improve supply routes to key markets resulting in enhanced conveyance of export produce to market by air.

- Strike an alliance with air carriers to minimise the number of trans shipment points between the producer and the market
- Agree favourable volume to weight rates for airfreight shipments to reduce the cost
- Advocate for flexi time in the air cargo industry

Competitive air, road and rail infrastructure through enhancement rialto existing infrastructure

- Investigate new road construction methodologies and technologies to increase quality and longevity of the road surface
- Advocate for a speedy completion and implementation of the Road Master Plan which will identify road maintenance needs for priority or major roads.
- Package and promote the investment/entrepreneurial opportunities in rail transport and related storage.
- Consult with the Jamaica Civil Aviation Authority (JCAA) and arrange for the necessary training and development of those exporting “hazardous” material

Transportation	Measures	Targets	Initiatives
Increased strategic alliances to establish supply routes to key markets resulting in enhanced conveyance of export produce to market by air	% increase in volume of air cargo exports	8%	<ul style="list-style-type: none"> ▪ Strike an alliance with air carriers to minimise the number of trans shipment points between the producer and the market ▪ Agree favourable volume to weight rates for airfreight shipments to reduce the cost ▪ Advocate for flexi time in the air cargo industry
Competitive air, road and rail infrastructure through enhancement to existing infrastructure			<ul style="list-style-type: none"> ▪ Advocate for a speedy completion and implementation of the Government’s Road Master Plan which shall identify road maintenance needs for priority or major roads. ▪ Package and promote the investment/entrepreneurial opportunities in rail transport and related storage. ▪ Investigate new road construction methodologies and technologies to increase quality and longevity of the road surface ▪ <i>Resuscitate the cold storage facility</i>
Improved efficiencies in the transportation of export goods	Number of delays / detentions resulting from shipment errors	0	<ul style="list-style-type: none"> ▪ Consult with the Jamaica Civil Aviation Authority (JCAA).and arrange for the necessary training and development of those exporting “hazardous” material

4. Energy

Energy is central to Jamaica's economic development and productivity. According to the Green Paper on Energy ⁸Jamaica has one of the highest energy intensity rates in Latin America and the Caribbean, due largely to the high energy use of the bauxite and alumina sector. The main characteristics of energy and its relationship with the Jamaican economy are summarised as follows:

- excessive dependence on imported primary energy;
- low energy supply self-sufficiency due to a lack of indigenous energy resources, and low utilisation of available sources, namely wind, hydro, solar and biomass;
- high petroleum consumption that is concentrated in alumina, power generation and transport sectors (per capita energy consumption has increased by 50% since the early 1990s);
- rising share of oil products in the import energy supply mix relative to crude oil (the latter share has fallen from 42.5% in 1990 to 23.5% in 2004);
- low levels of the refinery utilisation, operating below 60% since 1983; and high systems losses in the electricity industry, which has been deteriorating since 2001 and which reached 20% in 2004.

With the fluctuating price of oil, it is imperative that Jamaica finds alternative sources of energy to facilitate cheaper production in order to ensure global competitiveness of our export industry.

From indications generally, the following are issues identified:

- High cost of electricity.
- Inconsistency in power supply (outages) resulting in production losses.
- High costs to invest in back-up supplies / facilities.

Recommendations

Jamaica pursues reliable, cost-effective energy through encouraging diversification of the energy base and implementing energy management and contributing to a more competitive export sector

- Promote in a more focussed way solar electrical generation technology in the form of solar heating and solar cooling
- Advocate for implementation of net metering
- Pursue with greater haste the implementation and promotion of renewable energy systems for commercial consumers in Jamaica.

⁸ The Jamaica Energy Policy 2006-2020

- Improve the current incentives on low cost financing to facilitate the large outlay of capital to finance renewable energy
- Expand the incentives to include not only importing companies but the exporting companies implementing energy saving technologies.
- Focus on co-generation of energy for large energy consumers
- Contribute to energy conservation through partnership with JPS to develop and implement a practical energy management programme.

Energy	Measures	Targets	Initiatives
<i>Jamaica has reliable, cost-effective energy through encouraging diversification of the energy base and implementing energy management and contributing to a more competitive export sector</i>	<p>The ratio of energy cost to total cost</p> <p>The cost of generating energy</p>	<p>(by sector)</p> <p>US\$0.13 per kilowatt hour (from US\$0.16)</p>	<ul style="list-style-type: none"> ▪ Establish baseline data for energy usage and percentage of costs by sector ▪ Promoting in a more focussed way wind power generation, and solar electrical generation technology in the form of solar heating and solar cooling ▪ Facilitate firms' access to wind and solar energy technology. ▪ Mandate and support local power generation firms to upgrade plants and technologies in order to be more efficient and reduce production costs. ▪ Implement net metering by 2013 ▪ Develop and introduce a policy of renewable energy systems for all consumers in Jamaica. ▪ Improving the current incentives on low cost financing to facilitate the large outlay of capital to finance renewable energy ▪ Expanding the incentives to all companies implementing energy saving technologies. ▪ Ruthlessly focussing on co-generation of energy for large energy consumers ▪ Provide pursues/ support R&D in energy generation as well as pursue joint ventures with tertiary institutions to develop and implement renewable energy. ▪ Actively implement demand reduction / demand management programmes to reduce energy demand ▪ Support the recommendations for new energy policies and programme articulated in the Vision 2030 Development Plan, such as: <ul style="list-style-type: none"> ○ Develop and implement programmes to influence market behaviour toward and to promote efficient use of energy ○ Update, apply and enforce building codes to support efficient use of energy.

5. Security

The Context: A 2007 United Nations Office on Drugs and Crime (UNODC) report revealed that high levels of crime and violence are major threats to Caribbean growth and prosperity (UNODC, 2007). Crime not only affects economic activity, but also precludes investments. Crime has a strong impact on most firms in terms of security costs. This includes plant security as well as security of assets, goods in transit and port security associated with import and export of goods (e.g. container stripping).

Crime negatively impacts business expansion, investments and capacity utilisation that are all necessary conditions for increased productivity. In particular, it hinders greater capacity utilisation by limiting night shifts and longer operating hours, and provides a disincentive for firms to locate in Jamaica. Firms that increase capacity utilisation by using night shifts have had to incur security related costs to do so. It appears that the number of firms that limits utilisation by night shifts is not as high as perceived, as in a consultation with exporting firms; it was found that a number of these reported use of night shifts by themselves and their counterparts. Crime manifests itself to various extents in small businesses firms in the form of burglary, internal theft, and extortion as reported in a study⁹. This creates the need to utilise measures such as electronic security, and/or hired security guards, which is in most cases outside of the capability of MSMEs. Other measures are reliance on physical infrastructure such as locks, burglar bars and grills, security fencing, communal security.

The security of information is an area that is often overlooked but critical to the success of organisations. The cost of crime is a major concern as it hinders development by diverting resources which could have been otherwise used for expansion or diversification.

The Issues:

Increased cost of doing business based on costs to secure and inspect shipments to ensure integrity (impacting ALL goods sectors).

1. High crime and costs of related security measures limit multi shifts in production (such as manufacturing) and service operations (such as back-office service providers / contact centres).
2. Praedial larceny/pilferage results in losses to enterprises that decrease their profitability, especially farms including aquaculture, where it is a major cost/loss factor.
3. Intellectual property theft
 - a. Piracy in music/film industry
 - b. Information theft
4. Difficulty in attracting foreigners to consume services in Jamaica, such as in Education sector that faces crime as a deterrent in attracting foreign students.

⁹ A Landscape Assessment of Jamaican Enterprises (2008)

Crime is a priority issue for five of the priority export sectors, and identified as critical to be addressed if their development and export performance are to advance.

Recommendations

Achieve secure and more enabling environment to facilitate trade

1. Contribute to the improvement of national security through supporting the implementation of recommendations below made by the PSOJ's National Planning Summit 2007 by:
 - Implement appropriate recommendations of the McMillan report with emphasis on:
 - a) raising of standards for recruitment and training, professional development & remuneration of the police force
 - b) introducing new legislation to establish mechanism for the removal of unprofessional police officers
 - c) improve the court system – night court, mediation, commercial court
 - Establish an oversight committee made up of members of civil society that will communicate with the Ministry of National Security and Justice and assist with the implementation of the Crime Plan
2. Participate in national, business and community Strategic Initiative to reduce crime and improve security
3. Encourage national data security policy framework
4. Develop capacity of exporter to establish security policy, operate appropriate personal, property and data security measures/awareness programmes in their organisations.
5. Support the development of key partnerships with the Police in the business community
6. Facilitate BASC Certification and CTPAT Certification by building awareness of its benefits and encouraging implementation within exporting firms
7. Build public awareness about piracy and its impact on economic and social development
8. Continuously advocate for ruthless focus on improving our national security
9. Support the legislation of cyber crime
10. Support efforts related to strengthening the justice system and its reform.

Security	Measures	Targets	Initiatives
A secure environment which is more enabling to trade	Reduction in the cost of security Reduction in percentage of production lost to theft	(by sector) (by sector)	<ul style="list-style-type: none"> ▪ Support the National Planning Summit's Crime initiatives ▪ Support the legislation for cyber crime ▪ Support efforts related to strengthening the justice system and its reform ▪ Implement priority initiatives of the McMillan Plan <hr/> <ul style="list-style-type: none"> ▪ Advocate for national data security policy framework ▪ Develop capacity of exporter to establish security policy and guidelines, operate appropriate platform, personal, property and data security measures/awareness programmes in their organisations. ▪ Facilitate BASC Certification and CTPAT Certification by building awareness of its benefits and encouraging implementation within exporting firms ▪ Provide financing and technical support for firms implementing BASC. ▪ Build public awareness about piracy and its impact on economic and social development

Trade Facilitation

Trade facilitation involves government regulations and all public sector arrangements that affect international trade. To achieve efficiency and effectiveness all the customs and border-crossing procedures that constitute barriers to trade must be identified and removed.

According to the report of the recently concluded benchmarking study of Jamaica's trade facilitation systems and processes, Jamaica is favourably positioned in terms of its location and technological readiness, but it still lags in world rankings for global competitiveness.

- Jamaica slipped to 92 from 82 out of 178 countries in the most recent Trade Across Border category, which considers *processing times and document requirements for export* (and import), as well as *the per container costs*.
- Jamaica's per container costs were over \$600 higher on average than competitors like Panama.
- Jamaica also needs to reduce the number of days for export as well as the number of documents required. Other specific issues include:
 - Lack of a single clearing facility for trade facilitation
 - The export registration process

The Trade Board cited the inaccurate completion of forms by exporters as another issue. Additionally, the poor quality of information provided results in duplication of efforts and

unnecessary delays, and the detainment of shipments when exporters knowingly try to export goods not compliant with specific requirements.

- General Consumption Tax (GCT) is payable on some inputs which makes inventory and material costs high. Despite the claim for return of the GCT, it is often not repaid, and the double transaction requires time and money for administration for both the exporter and administrator.
- Standardisation of systems, processes and requirements in accordance to international best practice is being pursued. A number of initiatives underway are aimed at improving the business environment and the cost of doing business, such as improved service delivery at Jamaica Customs and Trade Board electronic processes. The following summarises the main issues identified:
 - Jamaica still lags in world rankings for global competitiveness.
 - Lack of electronic processing mechanism for all transactions
 - Long processing times
 - Numerous document requirements for export
 - Lack of a single clearing facility for trade facilitation
 - The lengthy export registration process
 - High container costs.
 - Outlay of capital for payment of GCT on inventory and material is not being timely reimbursed or 'net off'.
 - Weak exporter competency related to trade facilitation processes and procedures.
 - Slow pace of implementation of Jamaica Trade Point.

Recommendations

A more business friendly (trade facilitation) service delivery network

- (i) Improve the service delivery of the institutions that impact transaction time and cost.
- (ii) Implement the recommendations of the Trade Facilitation benchmarking study:
 - i. Establish a cross-ministerial National Transportation and Trade Facilitation Committee, constituted of those institutions charged with areas to be addressed by the body – registration, licensing, certification, inspection, testing and trade processes.
 - ii. Enhance Jamaica Trade Point to make it a full service Single Electronic Window,
 - iii. Link existing and planned trade-related systems to the Trade Facilitation Platform,

- iv. Enhance capacity of specific facilitation institutions,
 - v. Introduce a Rules of Origin office and provide related training.
- Create a rigorous mechanism to facilitate information sharing, discussions and feedback to enhance the implementation process
 - Mandate the cross-ministerial National Transportation and Trade Facilitation Committee to become an arm of the proposed National Export Council
 - Promote the services of the Export Centres / Business Information Points (EC/BIPs) to increase usage by current and potential exporters.
 - Advocate for collaboration of revenue collection agency in order that credit can be transferable to enable refund of GCT paid to be allocated to other revenue collection.

Reduced cost of doing business through increased cost efficiency of the sectors

- Provide export training on export procedures to reduce (i) exporter errors and therefore processing times and (ii) the number of detained shipments that are due to exporter error with facilitation documentation.
- Establish a committee to study and make recommendations on the possibility of reducing container cost through time volume contract and a structured approach to consolidation
- Increasing the support services for the sector through constant dialogue and regular sector meetings.
- Partner with the Productivity Centre to facilitate implementation of best practice within the industry
- Actively engage in all national efforts to facilitate productivity
- Develop programmes and implement workshops focusing on: collaborating to achieve economies of scale through group purchasing, outsourcing of business processes, partnerships, supplier efficiency
- Develop capacity of exporters in supply chain management, importance of productivity, record keeping, business plan, proposal writing through training and education
- Provide regional and global benchmark data for exporters

Trade Facilitation	Measures	Targets	Initiatives
<p>A more business-friendly (trade facilitation) service delivery network</p>	<p>(same as <u>facilitation study</u>)</p>	<p>(same as <u>facilitation study</u>) (tracking mechanism for initiative to be used)</p>	<ul style="list-style-type: none"> ▪ Improve the service delivery of the institutions that impact transaction time and cost, such as Jamaica Customs and Trade Board electronic processes by strongly supporting the initiatives which are already in place such as: <ul style="list-style-type: none"> (iii) Improvement in the service delivery of the institutions that impact transaction time and cost, such as Jamaica Customs and Trade Board electronic processes. (iv) <i>Implementing the following Trade Facilitation benchmarking study's export-related recommendations to:</i> <ul style="list-style-type: none"> i. <i>Establish a cross-ministerial National Transportation and Trade Facilitation Committee, constituted of those institutions charged with areas to be addressed by the body – registration, licensing, certification, inspection, testing and trade processes.</i> ii. <i>Enhance Jamaica Trade Point to make it a full service Single Electronic Window,</i> iii. <i>Link existing and planned trade-related systems to the Trade Facilitation Platform,</i> iv. <i>Enhance capacity of specific facilitation institutions,</i> v. <i>Introduce a Rules of Origin office and provide related training.</i> ▪ Create a rigorous mechanism to facilitate information sharing, discussions and feedback to enhance the implementation process ▪ Mandate the cross-ministerial National Transportation and Trade Facilitation Committee to become an arm of the proposed National Export Council ▪ Advocate for collaboration of revenue collection agency in order that credit can be transferable to enable refund of GCT paid to be allocated to other revenue collection.
<p>Reduced cost of doing business through increased cost efficiency of the sectors</p>	<p>Reduction in export processing errors (reported by the Trade Board) Reduction in container costs</p>	<p>80% accuracy reported (benchmark)</p>	<ul style="list-style-type: none"> ▪ Provide export training on export procedures to reduce (i) exporter errors and therefore processing times and (ii) the number of detained shipments that are due to exporter error on facilitation documentation. ▪ Resource a study to make recommendations for reducing container cost through time volume contract and a structured approach to consolidation ▪ Increase the support services for the sector through constant dialogue and regular sector meetings ▪ Partner with the Productivity Centre to facilitate implementation of best practice within the industry ▪ Develop programmes and implement workshops focusing on: collaborating to achieve economies of

Trade Facilitation	Measures	Targets	Initiatives
			<p>scale through: group purchasing, outsourcing of business processes, partnerships, supplier efficiency, etc.</p> <ul style="list-style-type: none"> ▪ Develop capacity of exporters in supply chain management, importance of productivity, record keeping, business plan, proposal writing through training and education ▪ Provide regional <i>and global benchmark data for exporters</i>

National Image and Branding

Nation branding is the act of deliberately shaping the world image of the country based on the country’s definition of its social and economic development goals. The process of nation branding can provide for Jamaica an effective tool by which to co-ordinate the management of the world image of the country both internally and internationally. Importantly, for the government of the country, a nation branding strategy has the potential to serve as a nexus for the transformation of the nation – its economy and social infrastructure – the psyche and attitudes of its people; the accomplishments of enterprise.

Through the process of developing a nation branding strategy, Jamaica will obtain a lever with which to manage its identity and image on the world stage, by systematically shaping the world’s understanding and conceptualization of Jamaica but more importantly, through sharpening the country’s understanding and esteem of itself.

Despite the tremendous opportunity to define its global competitive identity no formal audits have been undertaken to date in Jamaica to support development of its Nation Brand.

The primary stakeholders have agreed to collaborate on a nation branding initiative as a matter of priority. This overarching framework will guide all the elements of country branding including destination or tourism branding, cultural aspects of the brand as well as the country’s business image. Critical to the initiative will be the protection of our marks, country of origin issues, intellectual property and branding support and services to firms for their own marks.

Recommendations

Mount a national coordinated effort to uphold Jamaica's reputation through a nation branding framework and programme supported by creation and management of the nation's Intellectual Property.

- Primary stakeholders to collaborate on a national branding strategy (based on status and next steps)
 - a) Secure Cabinet approval to address the mechanisms for the development of the Nation Branding Strategy in Phase I.
 - b) Execute using the suggested three phase approach:
 - (i) Phase I – Developing the Nation Branding Strategy**

This phase focuses on the development of the Nation Branding Strategy, as well as design of the National Brand. It contemplates further stakeholder consultation, with the support of WIPO, and other international partners in order to establish the policy framework to guide the implementation of the Strategy and identify and concretise the synergies with other development plans for the country.
 - (ii) Phases II & III**

This phase focuses on the implementation and monitoring of the Strategy, respectively.
- Review current IP legislations to ascertain adequacy
- Increase opportunities to exploit nation branding while protecting national marks and symbols.
- Continued and increased development of Certification and Collective Marks to protect, support and promote selected Jamaican products and services in discerning international market segments.
- Establish a team with a mandate to improving the capacity of micro, small and medium-sized enterprises to benefit from the intellectual property that is embedded in their goods and services.
- Promote of the concept and building capacity for the management of Intellectual Property as a tradable good or service.
- Provide support to firms in enterprise and product/service branding linked to national branding in order to harness the benefits to association.
- Promote our market in a more coherent and strategic manner aligned to target sectors and markets for each, with improvements in the service delivery, such as the planning timeframe and scope, activity management and follow-up.

National Promotion / Branding	Measures	Targets	Initiatives
<p><i>A national coordinated effort to uphold Jamaica's reputation through a nation branding framework and programme supported by creation and management of Intellectual Property</i></p>	<p>Creation and approval of a national branding framework</p> <p>Enacting supporting legislation</p> <p># of collective marks registered</p> <p># of GIs registered/protected</p>	<p>Framework approved Y1</p> <p>Supporting legislation in Y2</p> <p>3</p> <p>3</p>	<ul style="list-style-type: none"> ▪ Primary stakeholders to collaborate on a national branding strategy (based on status and next steps) <ul style="list-style-type: none"> • Secure Cabinet approval to address the mechanisms for the development of the Nation Branding Strategy in Phase I. • Execute using the suggested three phase approach: <p>Phase I – Developing the Nation Branding Strategy</p> <p>This phase focuses on the development of the Nation Branding Strategy, as well as design of the National Brand. It contemplates further stakeholder consultation, with the support of WIPO, and other international partners in order to establish the policy framework to guide the implementation of the Strategy and identify and concretize the synergies with other development plans for the country.</p> <p>Phases II & III</p> <p>This phase focuses on the implementation and monitoring of the Strategy, respectively. Development of the recommendations for the remaining Phases will be the responsibility of the Executive Committee. The Executive Committee is responsible for developing the recommendations for Phases II & III during Phase I for which Cabinet's approval is being sought.</p> ▪ Review current (IP) legislations to ascertain adequacy ▪ Increase opportunities to exploit national branding while protecting national marks and symbols. ▪ Continued and increased development of Certification and Collective Marks to protect, support and promote selected Jamaican products and services in discerning international market segments. ▪ Establish a team with a mandate to improving the capacity of micro, small and medium-sized enterprises to benefit from the intellectual property that is embedded in their goods and services. ▪ Promote the concept and build capacity for the management of Intellectual Property as a tradable good or service. ▪ Provide support to firms in enterprise and product/service branding linked to national branding in order to harness the benefits to association. ▪ Promote our market in a more coherent and strategic manner aligned to target sectors and markets for each,

National Promotion / Branding	Measures	Targets	Initiatives
			with improvements in the service delivery, such as the planning timeframe and scope, activity management and follow-up.

Trade Promotion

Jamaica Trade & Invest (JAMPRO/JTI) is the national trade and investment facilitation and promotion agency. It provides a range of services including the provision of trade information, technical assistance and export promotion (trade shows, missions and business matching). These are provided primarily from its head office in Kingston Jamaica, but also its offices in Montego Bay, Jamaica, London, UK, and soon to be re-opened offices in New York and Toronto. The government is also committed to improving the in-market support firms require, and is exploring the re-activation of its agricultural marketing company in London, JAMCO, and building closer operational synergies with the Ministry of Foreign Affairs and Foreign Trade's eighteen overseas diplomatic missions.

Jamaican exporters have suggested that they prefer to focus on fewer (existing) markets, rather than trying to span their reach into too many additional and new markets.

The main issues are summarised as follows:

- While there is a lack of understanding in interpreting trade agreements, stakeholders (including the private sector firms) are not making themselves available to engage in the discussion/preparation for trade agreements, (which would inform their trade promotion objectives). Additionally, there is:
- Inadequate knowledge of market access requirements, standards and compliance in order to design market entry and promotions strategies.
- Lack of competency to access technical assistance to effectively promote products and services
- Inadequate budget and availability of information and research to undertake trade activities
- It is perceived by some exporters that much of the national promotional endeavours are directed towards few sectors, such as the agro processing sector, leaving gaps in services and support to other sectors.
- More focussed effort is needed in promoting benefits of protecting intellectual property*¹⁰ in target markets
- Fragmented approach in (i) our promotional efforts, (ii) exploiting national branding and (iii) protecting national marks and symbols*.

¹⁰ * will be dealt with under National Image and Branding

Recommendations

Increase market penetration in existing markets [new and emerging markets entry is a secondary objective].

- Remain focused on few target markets and shows or other initiatives rather than moving to different shows annually based on strategic selection of markets, and activities.
- Enhance follow up to trade promotion activities after their execution, and track the results and impact from activities to assist in assessing them for future value.
- Strengthen overseas representation:
 - by increasing overseas representation (JTI)
 - and engaging and capacitating overseas representatives (MFAFT) in marketing and other commercial activities and also using these sources to gather valuable market information.
- Develop targeted (and sector-specific) country-specific market penetration programmes that include trade show and trade mission plans
- Foster access to funding for promotions by:
 - Providing handholding services to access the range of technical assistance available for export promotion through trade shows, missions and business matching.
 - and providing funding to supplement exporters
- Translate/ the EPA and other trade agreements into simple actionable opportunities for exporters (with guidance on how to access these)
- Facilitate/Engage or encourage regional structures [CARICOM and CariForum/CEDA] to maximise opportunities from EPA. (For example, through partnerships and mechanisms to access development support related to the EPA in order to access more support for increased penetration in the target EU markets)
- Enhance the degree of institutional understanding by developing a network of knowledge providers on meeting market access requirements and other standards compliance.
- Encourage closer partnerships between the public and private sectors, in the form of immediate negotiations and lobbying, in an effort to capture for the sector more favourable market access to the major markets.
- Strengthen relationships with market partners (distributors and retailers of the products) critical for all products.

Trade Promotion	Measures	Targets	Initiatives
<p>Increased market penetration in existing markets</p> <p>Access to new and emerging markets</p>	<p>% increase in exports (value) to target markets</p>	<p>(Overall and by sector)</p>	<ul style="list-style-type: none"> ▪ Remain focussed on few target markets and shows or other initiatives annually based on strategic selection of markets, activities that offer best returns ▪ Enhance follow up to trade promotion activities following their execution, and track the results and impact from activities to assist in assessing them for future value. ▪ Develop targeted (and sector-specific) country-specific market penetration programmes that include trade show and trade mission plans ▪ Foster access to funding for promotions by: <ul style="list-style-type: none"> ○ Providing handholding services to access the range of technical assistance available for export promotion through trade shows, missions and business matching(Extend EXTAP – Exporter Assistance Programme – general and sector levels – to help increase accessibility of TA programme to firms.) ○ and provide funding to supplement exporters ▪ Translate/ the EPA and other trade agreements into simple actionable opportunities for exporters (with guidance on how to access these) ▪ Facilitate/Engage or encourage regional structures [CARICOM and CariForum/CEDA] to maximise opportunities from EPA. (For example, through partnerships and mechanisms to access development support related to the EPA in order to access more support for increased penetration in the target EU markets) ▪ Enhance the degree of institutional understanding by developing a network of knowledge providers on meeting market access requirements and other standards compliance. ▪ Encourage closer partnerships between the public and private sectors, in the form of immediate negotiations and lobbying, in an effort to capturing for the sector more favourable market access to the major markets. ▪ Strengthen relationships with market partners (distributors and retailers of the products) are critical for all products. ▪ Expand the reach of joint marketing strategies in each cluster and highlight the benefits that can be accrued from same. ▪ <i>Resource the National Coalition of Services Industries to identify market opportunities and undertake targeted promotion of services exporters</i>

Trade Promotion	Measures	Targets	Initiatives
			<ul style="list-style-type: none"> ▪ Develop viable marketing entities/ components within the clusters to be strengthened or created in the implementation of the NES.

Market Access	Measures	Targets	Initiatives
Increased penetration to new and existing markets with favourable agreements negotiated	% increase in exports to markets that are identified	(to be determined and tracked by market)	<ul style="list-style-type: none"> ▪ Provide market access information to the export community on new market opportunities arising from trade negotiations, in a practical manner. ▪ Engage the private sector and relevant stakeholders in trade negotiations and adjustment plans.
Minimised negative impact from market access changes			<ul style="list-style-type: none"> ▪ Provide alerts to private sector and relevant stakeholders of proposed and pending market access changes ▪ Engage private sector and relevant stakeholders in developing national responses to proposed market access changes. ▪ Provide support (inc. planning) to sectors and firms that need to adjust to market access changes.

In-Market Support	Measures	Targets	Initiatives
Increased market penetration in existing markets	% increase in exports (value) to target markets	(To be determined and tracked by target markets identified for implementation)	<ul style="list-style-type: none"> ▪ Strengthen overseas representation: <ul style="list-style-type: none"> ○ by increasing overseas representation (JTI) ○ and engaging and capacitating overseas representatives (MFAFT) in marketing and other commercial activities and also using these sources to gather valuable market information.

Business Development and Export Readiness

Critical to the success of implementing an export strategy is the level of export competence of managers in the business community. Keeping pace with international business requirements calls for extensive and continuous investment in competency development and keeping track of demand for new services in the form of training and business counselling. A range of institutions in the TSN (JTI, JBDC, and private sector associations) offer business and export competency training in the form of short workshops in the following areas: business plan development, marketing, financial management, pricing, among others. There are however less consistent advisory and support services tailored for the individual clients, or in-depth training in these and other areas. While some service providers offer effective services (such as the CFB that has been successful in the number of clients being approved for loans), the export sector has reported dissatisfaction with the quality of service provided by some institutions.

Countries with export success typically provide a suite of business and export competency services such as consulting, counselling, mentoring, and training through a variety of

institutions, network of retired business executives and business development service providers. There is evidence that some of these exist to a greater or lesser extent in Jamaica, however an integrated and complementary approach that targets current, potential and aspiring exporters is lacking.

Issues

From indications generally, the following summarises the main issues identified:

- Lack of consistent advisory and support services tailored for the individual clients,
- Limited In-depth training in business plan development, marketing, financial management, pricing, among others.
- Inadequate service quality offered by some institutions in the area of financing.
- Fragmented approach to targeting current, potential and aspiring exporters in the areas of business and export competency services such as consulting, counselling, mentoring, and training.
- Lack of an export training curriculum with the requisite scope and depth that enables complementary short courses (such as market development and penetration)
- Lack of understanding of the new business models for the future, such as in music

Recommendations

Based on the issues identified, and prioritised, the following strategic objectives and initiatives/actions are recommended:

Adopting an integrated and complementary approach to building capacity and competence in the public and private sectors to support the national export training and development agenda

- Promote partnerships between private and public education and training institutions to develop a three-tier export curriculum which spans introductory, supervisory and management courses.
 - Put in place a continuous improvement process for competency development through on-going needs assessment and modification of training and development programmes to ensure continued relevance.
 - Establish framework and mechanisms through which both the quantity and quality of the skills necessary to meet national and global demands (including foreign language skills) are identified.
- Build capacity within public and private sector primary training institutions (JTI, JEA, JBDC, ECs, etc.) to enable them to provide cutting-edge suite of business and export competency service such as consulting, counselling, mentoring, training and business development services

- Improve the PSOs institutional capacity to provide for the **certification** of training institutions and service providers in keeping with not just national but international standards and facilitate their certification as training institutions as well as the registration and accreditation of their programmes
- Promote the training so as to influence a change in the mindset of MSME exporters regarding the value of training and education and its contribution to the enhancement of our competitiveness through training and development –
 - through awareness campaign tied to results such as on productivity
 - Advocate for tax credits as incentives for enterprises that invest in training and education – maybe for MSMEs only or target sectors or target areas of training.

Business & Export Competency	Measures	Targets	Initiatives
<p><i>Adopting an integrated and complementary approach to building capacity and competence in the public and private sectors to support the national export training and development agenda</i></p>	<p>% of registered exporters / active exporters receiving export competency training</p> <p>% of staff at relevant institutions trained in business and export competency delivery</p>	<p>60%</p> <p>80%</p>	<ul style="list-style-type: none"> ▪ Promote partnerships between private and public education and training institutions to develop a three-tier export curriculum which spans introductory, supervisory and management courses. <ul style="list-style-type: none"> ○ Put in place a continuous improvement process for competency development through on-going needs assessment and modification of training and development programmes to ensure continued relevance. ○ <i>Establish framework and mechanisms through which both the quantity and quality of the skills necessary to meet national and global demands (including foreign language skills are identified.)</i> ▪ Build capacity within public and private sector primary service institutions (JTI, JEA, JBDC, ECs, etc.) to enable them to provide cutting-edge suite of business and export competency service such as consulting, counselling, mentoring, training and business development services ▪ Improve the PSOs institutional capacity to provide for the certification of service providers and training institutions in keeping with not just national but international standards and facilitate their certification as training institutions as well as the registration and accreditation of their programmes ▪ <i>Promoting the training so as to influence a change in the mindset of MSME exporters regarding the value of training and education and its contribution to the enhancement of our competitiveness through training and development –</i> <ul style="list-style-type: none"> ○ through awareness campaign tied to results such as on productivity ○ Advocate for tax credits for enterprises that invest in training and education – maybe for MSMEs only or target sectors or target areas of training.

Financing

The export sector requires among other things, an enabling business environment, which fosters and supports the establishment, survival and growth of their enterprises. This requires among other provisions financial support for modernisation of the sector by way of creating an economy in which capital is equitably and competitively available for the sector.

Unavailability of affordable financing has long been cited as one the major factors inhibiting the expansion of the business sector in general and the export sector specifically. According to the NES case document,¹¹ this has significantly and negatively impacted the rate of entrepreneurship in Jamaica and thus the export sector. According to a report from a study done on MSMEs¹², following the financial sector crisis of the 1990's, increased risk aversion coupled with high interest rates have adversely affected lending to MSMEs. In principle, sufficient funds are available for borrowing, however some of the many issues preventing access to available funds need to be addressed.

There are varying views as to whether the interest rates are reasonable. However it was felt that the schemes where reasonable rates are prescribed by Government are not being adequately disbursed while those which are being effectively disbursed, are charging 'usurious' rates.

Allocation of funds is also an issue for exporters and based on the MSME report¹³ indications are that funds are not being allocated to the enterprises with the greatest potential to engage in value-added activities and to create jobs.

Issues

From indications generally, the following summarises the main issues identified:

- High Public Debt adversely affects investment and productivity by distorting the allocation of investment toward less productive areas; and reducing the scope for public sector investment,
- The higher cost of capital in Jamaica relative to its trading partners is in part a result of public borrowing which has pushed up interest rates. Consequently, firms have found it difficult to borrow at prevailing interest rates to invest in new technology and equipment that would have increased and sustained productivity growth.
- Unavailability of funding
- Inability to access funds
- Inflexible collateral requirement
- Inability in finding investors for businesses needing it
- Inability of enterprises to provide quality plans and proposals supported by financial statements

¹¹ A Case for a National Export Strategy Jamaica's Response Paper

¹² Policy Report For The Jamaican MSME Sector

¹³ Policy Report For The Jamaican MSME Sector

- Poor or absent financial record-keeping,
- Inflexibility by the retailing agencies,
- Funds are not being allocated to the enterprises with the greatest potential to engage in value added activities and to create jobs.
- Computers and software not viewed as collateral by funding agencies
- IP rights not considered to have commercial value
- There are no industry figures to prove an attractive return on investment

Recommendations

Based on the issues identified, and prioritised, the following strategic objective and initiatives/actions are recommended:

Affordable financing that is accessible and available to allow investment in operating capital and reasonable returns on investment.

- Increase the capacity of exporters in the areas of business development such as cost accounting, control, record keeping, financial reporting, and business performance reporting and loan applications through training and education programmes.
- Execute a promotion campaign to ensure that exporters are aware of all available financing packages, interest rates and incentives being offered to the sector in an efficient and effective manner
- Review the current structure of incentives and assess the resulting performance and impact at the current level of use to determine whether adjustments are required to foster reinvestment
- Promote the introduction of factoring as a financing option
- Advocate for the country pursuing:
 - Macro-economic stability in order to achieve further reduction in the interest rates and increasing availability of funding for loans.
 - Stable exchange rate, with a policy that takes into account competitiveness considerations and allow flexibility in nominal exchange rates to ensure that local inflation does not erode the competitiveness of export.
- Reduce the high collateral requirements for MSMEs by providing export credit and guarantees in the form of a **Mutual Guarantee Fund***
- Extend the use of non-traditional types of collateral used to secure loans through development of a mechanism to use Intellectual Property assets such as copyrights, patents, trademarks and trade secrets as collateral to secure loans. (programme to be developed)
 - (i) Educate the financial sector on intellectual property valuation.

- Work with the financial institutions, building relationships and appeal for relaxing some of the onerous collateral requirements (may also need BOJ intervention)
- Improve the efficiency of property title transfer to facilitate the use of land in accessing capital.
- Increase the confidence and involvement of the AFIs in sharing of information and risk by adopting a structured approach to credit history and collateral through the establishment of privately run **Credit Bureau*** and **Collateral Registry^{14*}** (**status and next steps needed – to integrate to existing plans**)
- Support the creation of new types of financial products for MSMEs through establishment of financing via **Venture Capital, Angel Funding***, lending support and pushing for the completion of the **Junior Stock Exchange*** which is currently being developed, and expanding and promoting **Lease Agreements*** which is being offered by only a few entities.
- Implement measures to improve the financing offered through the GOJ and donor agencies by:
 - (ii) Adopt Guiding Principles for GOJ-Supported Lines of Credit
 - (iii) Review of existing lending Mechanisms
 - (iv) Special Incentives to Guide Allocation of Funds to Critical Sectors
 - (v) Adopt General Guiding Principles regarding Lending rates for MSMEs
 - (vi) Expand the reach of supporting agencies to enable SMEs and MSMEs to take advantage of donor funding
 - (vii) Develop a collaborative approach between public and private sector
- Continue/Maintain support services offered through the Corporate Finance Broker which currently operates through JTI
- Expand network of financial institutions to include those committed to the development of SMEs and MSMEs and will implement the prescribed interest rates.
- Encourage competitive interest rates on financing for exporters
- Identify and support export related projects
- Look at ability of the banks to access cheaper debt overseas as well as firms' ability to do so
- Allocate funds and promote micro- financing through relevant entities with good track record in loan financing.
- Provide special financial assistance to support the development of enterprises engaged in value-added production.
- Strengthen the technical assistance services offered by JTI.

¹⁴ * See Notes in Appendix 3 (Page 68) for details of recommendations

Finance	Measures	Targets	Initiatives
<p>Affordable financing that is accessible and available to allow investment in operating capital and reasonable returns on investment.</p>	<p># of export enterprises receiving capacity and counselling support for accessing financing</p>	<p>100</p>	<ul style="list-style-type: none"> ▪ Increase the capacity of exporters in the areas of business development such as cost accounting, control, record keeping, financial reporting, and business performance reporting and loan applications through training and education programmes. ▪ Execute a promotion campaign to ensure that exporters are aware of all available financing packages, interest rates and incentives being offered to the sector in an efficient and effective manner
	<p>New policy measure introduced to address concerns related to access to finance</p>	<p>2</p>	<ul style="list-style-type: none"> ▪ Continue/Maintain support services offered through the Corporate Finance Brokers which currently operates through JTI ▪ Strengthen the TA services offered by JTI ▪ Provide special financial assistance to support the development of value-added enterprises
	<p>% of firms reporting access to favourable financing / # of firms accessing first-time financing</p>	<p>25</p>	<ul style="list-style-type: none"> ▪ <i>Review the current structure of incentives and assess its resulting performance and impact at the current level of use to determine whether adjustments are required to foster reinvestment based on their</i> ▪ Promote the introduction of factoring as a financing option ▪ Advocate for the country pursuing: <ul style="list-style-type: none"> • Macro-economic stability in order to achieve further reduction in the interest rates and increasing availability of funding for loans. • Stable exchange rate, with a policy that takes into account competitiveness considerations and allow flexibility in nominal exchange rates to ensure that local inflation does not erode the competitiveness of export. ▪ Reduce the high collateral requirements for MSMEs by providing export credit and guarantees in the form of Mutual Guarantee Fund* ▪ Extend the use of non-traditional types of collateral used to secure loans through development of a mechanism to use Intellectual Property assets such as copyrights, patents, trademarks and trade secrets as collateral to secure loans. (programme to be developed) <ul style="list-style-type: none"> (i) Educate the financial sector on intellectual property valuation ▪ <i>Work with the financial institutions, building relationships and appeal for relaxing some of the onerous requirements (may also need BOJ intervention)</i> ▪ Encourage competitive interest rates on financing for exporters ▪ Improve the efficiency of property title transfer to facilitate the use of land in accessing capital. ▪ Increase the confidence and involvement of the AFIs by sharing of information and risk by adopting a structured approach to credit history and collateral through the establishment of privately run Credit Bureau* and Collateral Registry^{15*} ▪ Support the creation of new types of financial products for

Finance	Measures	Targets	Initiatives
			<p>MSMEs through establishment of financing via :</p> <ul style="list-style-type: none"> ○ Venture Capital, Angel Funding*, ○ lending support and pushing for the completion of the Junior Stock Exchange* which is currently being developed, and ○ expanding and promoting Lease Agreements* which is being offered by only a few entities. <hr/> <ul style="list-style-type: none"> ▪ <i>Implement measures to improve the financing offered through the GOJ and donor agencies by:</i> <ul style="list-style-type: none"> (ii) <i>Adopt Guiding Principles for GOJ-Supported Lines of Credit</i> (iii) <i>Review of existing lending Mechanisms</i> (iv) <i>Special Incentives to Guide Allocation of Funds to Critical Sectors</i> (v) <i>Adopt General Guiding Principles regarding Lending rates for MSMEs</i> (vi) <i>Expand the reach of supporting agencies to enable SMEs and MSMEs to take advantage of donor funding</i> (vii) <i>Develop a collaborative approach between public and private sector</i> ▪ Expand network of financial institutions to include those committed to the development of SMEs and MSMEs and will implement the prescribed interest rates. ▪ Look at ability of the banks to access cheaper debt overseas as well as firms' ability to do so ▪ Allocate funds and promote micro- financing through relevant associations with good track record in loan financing.

Packaging

Product packaging is the art and science of creating boxes, covers, tubes, bags and other containers that are sturdy enough to protect the product inside and that are effective promotional pieces in themselves. To a very large degree, the quality of design work on the package affects how well products sell.

Packaging is, therefore, fundamental to the protection of products during transport and also crucial to the image of the brand being exported. Packaging has significant implications for the value of exported products and therefore critical to the success of the business of exporting.

According to a Competitive Assessment¹⁶, in Jamaica packaging cost accounts for a substantial share of total costs. Cans, plastic bottles and labels are produced locally. However, bottles have to be imported. Changes in the trade regime, particularly the removal of protective tariffs and the rationalization of packaging firms within the CARICOM region (e.g. relocation of Jamaica Packaging Industries to Trinidad and Tobago and the closure of West Indies Glass) has eroded the ability of the local packaging industry to supply the local needs, especially of the Agro-Processing sub sector. Whereas companies in the industry prefer to acquire packaging material locally, it is not clear whether a local packaging industry will be able to produce glass bottles and other packaging material at a competitive cost with imports. A new up to date packaging plant is being set up.

Regarding design, reports from companies involved in product development indicate that there is not enough technical support to facilitate packaging product development across all sectors. From indications generally, the following are issues identified:

Issues

- Local packaging industry unable to supply the needs of sectors – especially the Agro Processing sub sector
- Unavailability of competitive local packaging (cost, range, and/or quality)
- Limited technical support in (i) branding/packaging related regulation and (ii) packaging innovations
- Limited knowledge of packaging and the implications for intellectual property
- Inadequate knowledge of designs (and requirements) for foreign markets;
- The quality of the execution of designs (printing) on export packages/labels is too low;
- Difficulties in introducing joint export marketing strategies between producers/packers of related products.

¹⁶ Competitiveness Assessment (Poot & Brown, 2006)

Recommendations

Based on the issues identified, and prioritised, the following strategic objectives and initiatives/actions are recommended:

Improved access to affordable quality export packaging

- Consult industry and packaging firms to review the most feasible option :
 - (i) Reduce leakage by re-vitalising and improving competitiveness of the local manufacturing of packaging (e.g. corrugated cartons, glass and plastic containers) or
 - (ii) Build efficiencies by creating synergies with other source countries to supply all our export packaging requirements which are not available (quantity & quality) locally.
- Expand group purchasing of glass (and other packaging products) in relevant clusters to benefit from economies of scales
- Conduct research to identify more cost effective sources for packaging
- Develop packaging research and training capacity
- Encourage entrants in the field of packaging innovation and design – by expanding current graphic arts or related design fields and engage the sector in the needs assessment for curriculum design.
- Increase awareness of packaging design requirements, innovations regulation and quality international packaging standards
- Work with Exporters to increase knowledge of how packaging may be utilised for differentiation in export markets
- Expand the reach of joint marketing strategies in each cluster and highlight the benefits that can be accrued from same.

Packaging	Measures	Targets	Initiatives
Improved access to affordable quality export packaging	% reduction in packaging costs % of value in imported packaging materials	15% <i>*Food and processing sectors only</i>	<ul style="list-style-type: none"> ▪ Consult industry and packaging firms to review the most feasible option : <ul style="list-style-type: none"> • Reduce leakage by re-vitalising and improving competitiveness of the local manufacturing of packaging (e.g. corrugated cartons, glass and plastic containers) or • Build efficiencies by creating synergies with other source countries to supply all our export packaging requirements which are not available (quantity & quality) locally. ▪ Expand group purchasing of glass (and other packaging products) in relevant clusters to benefit from economies of scales ▪ Conduct research to identify more cost effective sources for packaging <p>-----</p> <ul style="list-style-type: none"> ▪ Develop packaging research and training capacity ▪ Encourage entrants <i>in the field of packaging innovation and design – by expanding current graphic arts or related design fields and engage the sector in the needs assessment for curriculum design.</i> <p>-----</p> <ul style="list-style-type: none"> ▪ Increase awareness of packaging design requirements, innovations regulation and quality international packaging standards ▪ Work with Exporters to increase knowledge of how packaging may be utilised for differentiation in export markets

Quality Management

Inability to meet international quality standards is a key issue facing exporters, and exporting firms especially in the agro-processing sector face stringent quality requirements. Jamaica has the relevant legislative and institutional framework for quality, standards and other requirements. However, the timeliness and consistency of the service delivery needs improvement. The primary institutions include the: The Bureau of Standards, (BSJ), Jamaica Agricultural Society Crop Certification Programme, IDB MIF/GOJ Implementation of Quality Environmental and Food Safety Systems in Jamaica /Quality Jamaica Project, A Certification Body has been established, but is not yet operational, National Quality Awards (NQA) Programme, Scientific Research Council: Veterinary Services Division, Ministry of Agriculture, Plant Quarantine and Inspection, Ministry of Agriculture, and the Ministry of Health. However, while within the public and private sectors there are a number of quality support service providers, there are a number of capacity constraints that impede the delivery of a comprehensive and affordable range of quality services to the export community.

Issues

From indications generally, the following summarises the main issues identified:

Inability of firms to meet stringent international quality standards due to:

1. High costs of some basic services
2. Limited (but growing) availability of local experts in some technological support services, such as HACCP and ISO certification, product development research and testing (such as formulation) within firms and institutions.
3. Costs of services such as (product testing, certification) provided by the private sector are in some cases still prohibitive, and in other cases the quality of service provided by these professionals is variable.
4. High costs of compliance with international standard requirements.
5. Food exporters have to contend with a range of testing and laboratory services that reside in multiple agencies resulting in the country not meeting international standards (such as the single or aligned veterinary authority for meat and poultry products as required by the World Organisation for Animal Health (OIE)¹⁷
6. Low appreciation for quality and its importance to competitiveness
7. A perceived lack of technical and experienced personnel in the government regulatory bodies.
8. The perception by exporters that government regulatory bodies are too focused on commercialization rather than regulation which results in lack of transparency.

¹⁷ PIOJ, 2007 and Sanjay Ross, SRC, personal communication, February 7, 2008

Recommendations

Based on the issues identified, and prioritised, the following strategic objectives and initiatives/actions are recommended:

To enhance the capacity of exporters to provide quality goods and services that meet international standards

- Provide cost-effective quality certification by expanding current internationally-funded training and quality certification programmes and attracting new ones.
- Educate exporters on the long term benefits of quality management Encourage enterprises to achieve and **maintain** HACCP and ISO standard
- Conduct public awareness program and training on quality assurance and conformity issues aimed directly at all operatives within the export sector. – Or specific programme thru ECs, JTI, JEA communications
- BSJ to follow up on certified firms on conformance for maintaining certification. Provide staff hiring and training to allow BSJ to perform monitoring and audits to be conducted for firms to maintain standards already obtained.
- Harmonise the inspection regime to which exporters are subjected, combining or integrating inspections where they have common elements. (e.g. health and quality inspection).
- Develop and promote a local registry of all technical services available in Jamaica and thereby identify the gaps existing that could inform training and certification expertise development.
- Mechanism to track emerging / new requirements, communicating these to export sector and providing support for meeting new requirements. – Particularly through the trade and business services providers.
- Establish a Centre for Quality Control/Assurance Excellence which would provide all the necessary support to exporters from idea to market and also provide training for professionals as well as maintaining the local registry of technical services available in Jamaica.
- Establish additional accredited labs with sufficient equipment and laboratory facilities.
- Regulatory bodies to increase their levels of experienced technical experts.
- Refocus our local quality assurance and regulatory body on regulating the sector and less on commercialisation of their services.
- Lab and testing harmonisation
- Seek to improve the resource allocation of labs and service institutions
- Reduce turnaround time and cost in institutions providing testing inspection and other quality services.

- Provide information on quality benefits and standard requirements to firm to inform the planning and operations.

Quality Management	Measures	Targets	Initiatives
<i>Enhanced capacity of exporters to provide quality goods and services that meet international standards</i>	<p>% of exporters (registered or active) receiving quality certification</p> <p># of enterprises benefiting from awareness initiatives</p> <p>% of firms re-certified.</p> <p><i>Reduction in processing times by the BSJ</i></p>	<p>Agri: 50% Aqua: 40% Bev: 80% ICT: 25% Mining: 20%</p> <p>300</p> <p>90%</p> <p><i>Baseline required</i></p>	<ul style="list-style-type: none"> ▪ Provide cost-effective quality certification by expanding current internationally-funded training and quality certification programmes and attracting new ones. ▪ Educate exporters on the long term benefits of quality management ▪ Encourage relevant enterprises to achieve and maintain HACCP and ISO standard ▪ Conduct public awareness program and training on quality assurance and conformity issues aimed directly at all operatives within the export sector. – Or specific programme thru ECs, JTI, JEA communications ▪ Provide information on quality benefits and standard requirements to firm to inform the planning and operations. ▪ BSJ to monitor certified firms on conformance for maintaining certification. Provide staff hiring and training to allow BSJ to perform monitoring and audits to be conducted for firms to maintain standards already obtained. ▪ Regulatory body to increase their levels of experienced technical experts. ▪ Refocus local quality assurance and regulatory body on regulating the sector and less on commercialisation ▪ Reduce turnaround time and cost in institutions providing testing, inspection and other quality services. ▪ Develop and promote a local registry of all technical services available in Jamaica and thereby identify the gaps existing that could inform development of training and certification expertise. ▪ And inclusion in tertiary curricula / as well as design of curricula to be industry relevant – and attracting people into the field. ▪ Harmonise the inspection regime to which exporters are subjected, combining or integrating inspections where they have common elements. (e.g. health and quality inspection). ▪ Mechanism to track emerging / new requirements, communicating these to export sector and providing support for meeting new requirements. Particularly through the trade and business services providers via the EAMN. As well as undertake the assessment of these in order to advise on which if any will be critical – including conducting cost-benefit analysis for

Quality Management	Measures	Targets	Initiatives
			<p>compliance.</p> <ul style="list-style-type: none"> ▪ Establish additional accredited labs with sufficient equipment and laboratory facilities. ▪ Lab and testing harmonisation ▪ Seek to improve the resource allocation of labs and service institutions with ▪ <i>Establish a Centre for Quality Control/Assurance Excellence which would provide all the necessary support to exporters from ideat to market and also provide training for professionals as well as maintaining the local registry of technical services available in Jamaica.</i> ▪ <i>Expand the diagnostic/assessment services provided through the Enterprise Rating & Upgrading (ERU)</i>

Trade Information

Information is critical to the success of any organisation. Dissemination of information is always a challenge to trade support institutions. This is due to the human and financial resources required for acquiring, producing and distributing material. ICTs such as the internet now offer a wide range of distribution media with limited investment, enabling rapid delivery of information. In the framework of worldwide deregulation and liberalisation, where barriers to trade are continually falling and new methods of business emerges, reliable trade information is becoming increasingly important.

According to the NES Response Paper¹⁸, to improve exporter access to information, a joint Jamaica GOJ/EU initiative was launched to provide crucial support services to exporters via Export Centres (EC) and Business Information Points (BIP). Potential and existing exporters will be provided with a range of standardised universal and value-added services at ECs. On the other hand, BIPs will offer a range of standardised, specific business information, which will assist entrepreneurs and individuals in improving competitiveness (Forrester, 2007). 5,000 entities have been targeted under this initiative.

Issues:

- Lack of packaged and updated export-specific reports, such as country or product profiles
- Limited resources within the service delivery institutions for the preparation of special information needs, such as market entry or feasibility reports.
- Limited awareness by the export community of the types of information available and the sources of information.

¹⁸ The Case for a National Export Strategy

- Lack of information about regulatory changes and other export requirements resulting in delays and additional charges.

Recommendations

Based on the issues identified, and prioritised, the following strategic objectives and initiatives/actions are recommended:

Increased provision of (useful/quality) trade information from enhanced trade service providers.

- Partner with the Universities to conduct research and data collection for the export industry
- Conducting continuous competitiveness analyses of all export sectors and make the data available for development of the industry
- Promote the Export Centre (EC) and Business Information Points (BIPs), Community Access Points (CAPs), libraries and others to build awareness, interest in the sector and drive usage of the current services.
- Increase dissemination:
 - Facilitate access to information available through international databases, embassies and research companies. /
 - Set up a repository for an effective market information system
 - Develop an Export Communication Centre specifically to disseminate all information changes in export requirement to all regulatory bodies, transport and customs and other intermediaries.
- Become proactive in fulfilling and anticipating the information needs of the user and deliver value-added services by professional staff, e.g., advisory and/or consulting services.

Improved capacity of trade info service providers providing increased dissemination of tailored trade information.

- Build capacity of a team of skilled information professionals
 - Enhance the capacity of trade service providers to provide standard - market entry requirements, non-tariff barriers, and buyer requirements- and client-specific information -market feasibility of specific products.
 - Continuously build capacity and competence to manage trade information for national development.
- Facilitate trade information providers, enabling them to convert information gathered by the in-market knowledge network to market intelligence that is commercially relevant.

- Engage overseas representatives in gathering market intelligence for target sectors within their markets.

Trade Information	Measures	Targets	Initiatives
<p>Increased provision of (useful/quality) trade information from enhanced trade service providers.</p>	<p># of standard market reports generated for distribution</p>	<p>Sector reports – 9 Market reports - 6</p>	<ul style="list-style-type: none"> ▪ Partner with the Universities to conduct research and data collection for the export industry ▪ Conducting continuous competitiveness analyses of all export sectors and make the data available for development of the industry ▪ Promote the Export Centre (EC) and Business Information Points (BIPs) Community Access Points (CAPs), libraries and others to build awareness, interest in the sector and drive usage of the current services. ▪ Increase dissemination: <ul style="list-style-type: none"> ○ Facilitate access to information available through international databases, embassies and research companies. / ○ Set up a repository for an effective marketing information system ○ Develop (or identify a current) Export Communication Centre to disseminate all information changes in export requirements to all regulatory bodies, transport and customs and other intermediaries. ▪ <i>Become proactive in fulfilling and anticipating the information needs of the user and deliver value-added services by professional staff, e.g., advisory and/or consulting services.</i>
<p>Improved capacity of trade info service providers providing increased dissemination of tailored trade information.</p>	<p>Trade information programme for partners developed</p> <p># of partner staff trained on trade information gathering, packaging and dissemination</p>	<p>Programme developed and executed in year 1</p> <p>20</p>	<ul style="list-style-type: none"> ▪ Build capacity of a team of skilled information professionals (with training the trainer component). <ul style="list-style-type: none"> ○ Enhance the capacity of trade service providers to provide standard - market entry requirements, non-tariff barriers, and buyer requirements- and client-specific information -market feasibility of specific products. ○ Continuously build capacity and competence to manage trade information for national development. ▪ Train and resource trade information providers, enabling them to convert information gathered by the in-market knowledge network to market intelligence that is commercially relevant. ▪ Engage overseas representatives in gathering and analysing market intelligence for target sectors within their markets.

Priority Sector Strategies

The Client Perspective, Sector and Client Focus

AGRO-PROCESSING (FOOD & BEVERAGES)

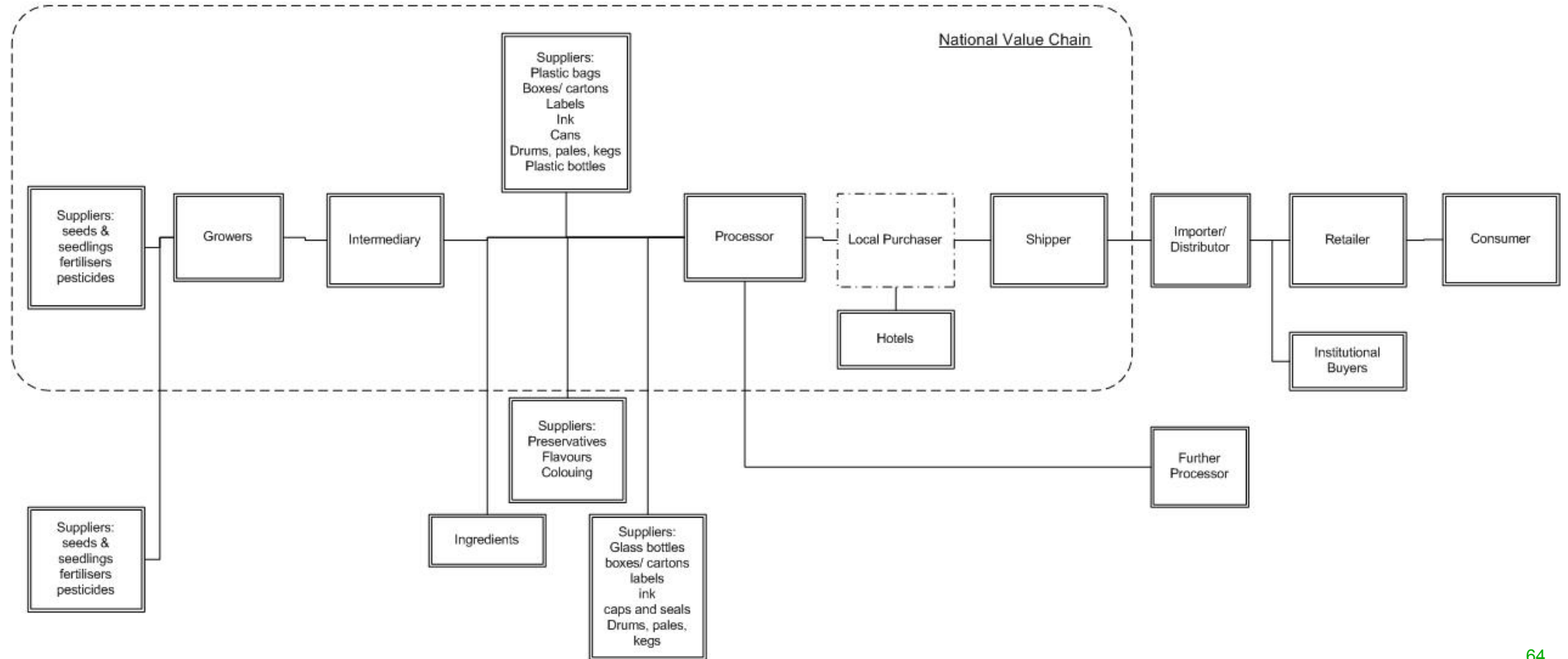
Jamaica's unique and diverse range of food products continues to be in increasing demand internationally, and consistently helps build Brand Jamaica. The priority product groups within the sector that are targeted in the Strategy account for 6% of total goods export. The export of food products has increased each year and grew by almost 43% in 2008, proving the sector to be a reliable and consistent contributor to growth of non-traditional exports.

The Manufacturing sector is one of the most important contributors to the country in terms of GDP and employment. The agro-processing sector, within this wider sector contributes to adding value to Jamaican agricultural products as well as to employment in rural areas. Its linkages go beyond the agriculture sector to tourism, packaging and other supporting industries.

Objectives

- To increase exports by 15% each year by improving access to overseas buyers
- To introduce 5 new products by year 2012 to the export market
- 60% of the industry has adopted full global best practices in order to achieve improved efficiencies and improve productivity
- To improve JAPA so that it is a vibrant association driving the sector's development policies and programmes.

Value Chain: Agro-Processing



SWOT Analysis

<p>S T R E N G T H S</p> <ul style="list-style-type: none"> ▪ Brand equity and strong country of origin reputation. ▪ Established niche markets, brands and products ▪ Established channels to the target markets with experience to expand reach – supply chain is well established ▪ Export-orientated, diverse product range that includes unique products. ▪ There are world-class enterprises within the sector able to make high quality products ▪ Support programmes in place for the industry. ▪ Presence of industry competition to drive performance. ▪ Standard compliance and quality products. ▪ Availability of some ‘green’ raw materials ▪ Reasonable and improving product development competency exists. 	<p>W E A K N E S S E S</p> <ul style="list-style-type: none"> ▪ Inconsistency in quality and supply of domestic raw materials ▪ Limited /Insufficient innovation in technology and product development to match evolving market trends ▪ Weak linkages to R&D resources (private and academic), like the SRC. ▪ High Import content and therefore significant leakages. ▪ Few companies follow best practices and quality standards., with low utilisation of Quality Management Systems (QMS) and Environmental Management Systems (EMS) ▪ <i>No IP protection in place</i> ▪ Uncoordinated marketing efforts among the industry. ▪ Mistrust, poor networking between processors. ▪ Weak procurement networks ▪ Weak coordination among policy and services entities that support or guide the industry (Ministries and agencies) ▪ Low uptake of available incentives and poor utilisation of funding and technical assistance. ▪ Inadequate linkages in the supply chain. ▪ Weak export focus among many potential and current exporters. ▪ Exporters are too USA-focussed. ▪ Limited availability of technical skills necessary to build viable businesses
<p>O P P O R T U N I T I E S</p> <ul style="list-style-type: none"> ▪ Strong demand for Jamaican products, which is increasing in some markets. ▪ Research and Development support is available. ▪ Plant layout and design support available ▪ Access to product knowledge. ▪ Training programmes are available. ▪ Climate and soil quality conducive to growing certain crops. ▪ Environmental positioning based on products and processes / systems ▪ Growth in potential linkage industries – such as wellness ▪ General tourism market growth with the capacity to increase purchases. ▪ Proximity to main export market (USA). 	<p>T H R E A T S</p> <ul style="list-style-type: none"> ▪ Increasing theft in the industry. ▪ Lack of a clear Agricultural Policy ▪ Continued increase in labour costs without corresponding productivity improvements. ▪ Low growth in the domestic market. ▪ Low levels of investment in the sector. ▪ Increasing security costs. ▪ Continued urban migration reducing the labour force for the sector. ▪ Poor perception of agriculture as a viable economic sector. ▪ Inadequate (poor) transportation impacting on product quality arriving to processors. ▪ Weather conditions impact raw material (ingredient) supply. ▪ Increasing numbers of international and local environmental regulations. ▪ Exports of Jamaican “knock-offs” ▪ Violation of geographic indicators by foreign manufactured products ▪ New product development in competing countries. ▪ <i>An unstable FX regime – based on the rate at which it changes</i> ▪ No competitive interest rates to allow for reinvestment in the sector.

VISION

A dynamic non-traditional export sector characterised by high levels of diversification, and sustained growth in new and value-added products.

DEVELOPMENT PERSPECTIVE

The Sector contributes to the development of rural communities through employment, backward linkages and a commitment to research and development, and sustainable environmental practices.

COMPETITIVENESS PERSPECTIVE	<p style="text-align: center;">Supply-Side (BORDER IN)</p> <p>Flexible financing for the agriculture sector is provided.</p> <p>Effective re-tooling resulting from improved expertise.</p> <p>Product development partnerships result in new products successfully commercialised.</p> <p>More technical skills available in the industry.</p>	<p style="text-align: center;">Transaction/Cost of Business/ Infrastructure (BORDER)</p> <p>Praedial larceny is significantly reduced.</p> <p>Lower, standard port charges are introduced.</p>	<p style="text-align: center;">Demand-Side (BORDER OUT)</p> <p>There is increased industry participation in policy development and negotiations. Support provided to cover high promotions costs.</p> <p>Competing illegal exports declines.</p>
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CLIENT PERSPECTIVE	<p style="text-align: center;">TRADE FINANCE</p> <p>Flexible trade finance programme developed.</p>	<p style="text-align: center;">QUALITY & STANDARDS MANAGEMENT</p> <p>There is improved enforcement of regulations and standards.</p> <p>There are adequate testing facilities making it difficult to assess products analytically.</p>	<p style="text-align: center;">Business & Technical Competency</p> <p>The technical expertise for production of quality products is at global standards.</p> <p>marketing management as well as business proposal development is improved.</p>	<p style="text-align: center;">FINANCE</p> <p>Affordable and accessible finance made available.</p> <p>PACKAGING Affordable quality export packaging made available locally</p>
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Institutional Perspective

The Jamaica Agro-processors Association (JAPA) is strengthened to deliver optimal support to sector development and implementation of electronic systems for greater efficiency by trade support agencies.

AGRO-PROCESSING			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE DEVELOPMENT PERSPECTIVE			
Investment			
			<ul style="list-style-type: none"> ▪ Develop feasibility and business model for a primary processing facility that sorts and grades raw material, as well as conducts primary processing of inputs, and storage. ▪ Develop investment opportunity profile and promote the opportunity.
THE COMPETITIVENESS PERSPECTIVE			
BORDER –IN			
Capacity Development			
	Percent of factories increasing yield of products by at least 50% <i>Each processor obtains a retooling plan</i>	30%	<ul style="list-style-type: none"> ▪ Support the priority competitiveness initiatives identified in the relevant cross-sector strategies. ▪ Identify and obtain resources to contract technical expertise to properly advise processors on retooling. Such as selecting the best equipment, preparing cost-benefit analyses, arranging shared purchase of investment for shared / contract use. ▪ Seek financing to address constraints of access and cost. ▪ Inform enterprises of incentives and schemes to foster retooling.
			<ul style="list-style-type: none"> ▪ Facilitate the introduction of alternate and renewable sources of energy in facilities to reduce use of energy from imported fuels ▪ <i>Provide cost-benefit analysis for green technologies and encourage their introduction</i>
	Percent of factories increasing product range by 20%	30%	<ul style="list-style-type: none"> ▪
BORDER			
Capacity Diversification			
			<ul style="list-style-type: none"> ▪ Improve the product development expertise and technology to facilitate new product development ▪ Obtain resources for product research to identify: <ul style="list-style-type: none"> ○ value added products that are feasible for introduction into operations <ul style="list-style-type: none"> • high value alternatives for waste processing. Examples include compost, energy, bricks, and fertilisers. ▪ Promote the introduction of new product lines based on the possible processes of inputs that exists, such as dried fruits

AGRO-PROCESSING			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
Cost of Doing Business			
			<ul style="list-style-type: none"> • Foster group purchasing mechanism and initiatives to facilitate group purchase of products in bulk to reduce per unit cost of items as well as shipping and other transactional costs. ▪ Facilitate processor-grower buyer matching for purchasing directly instead of intermediaries, which would mean better quality, and prices. ▪ Support initiatives aimed at reducing Praedial Larceny
BORDER-OUT			
Market Access			
	Percent of industry players gaining direct market access	40%	
In-Market Support			
Sector Promotion			
THE CLIENT PERSPECTIVE			
Client Focus			
Business & Export Competency			
Trade Information			
			<ul style="list-style-type: none"> ▪ Prepare market intelligence reports for the sector.
Finance			
	Number of Agro Processing firms accessing new finance packaging each year	25 by 2012	
Quality Management			
	Percent industry	50%	<ul style="list-style-type: none"> ▪ Improve enforcement of regulations and standards.

AGRO-PROCESSING			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
	compliant to HAACP, ISO 9000 (or ISO 200) and 14000		<ul style="list-style-type: none"> ▪ Increase the number of testing facilities to allow firms to assess products analytically
Trade Promotion			
			<ul style="list-style-type: none"> ▪ Design and execute in-bound missions to bring overseas buyers to Jamaica for industry familiarisation tours and match-making
Other Trade Support Services			
			<ul style="list-style-type: none"> ▪ Design and deliver technical assistance training to farmers aimed at improving yield, enhancing efficiencies, crop planning, such as when to reap. ▪ Provide technical support and information to support training provided.
			<ul style="list-style-type: none"> ▪ Develop industry purchasing planning platform to facilitate arranged purchasing between buyers (processors or intermediary) and grower that provides buyer times that allow growers to plan reaping to correspond with storage and transport to maintain the quality. ▪
	Percent of factories meeting safe standards	80%	<ul style="list-style-type: none"> ▪
THE INSTITUTIONAL PERSPECTIVE			
			<ul style="list-style-type: none"> ▪ Engage the TSN in discussions on the industry development programme, their role and functions and cooperation towards the agreed objectives.
			<ul style="list-style-type: none"> ▪ Provide support for strengthening JAPA

Aquaculture

Fish, crustaceans and molluscs have been one of Jamaica's best performing exports in the non-traditional export category; making the aquaculture sector a potential champion export for Jamaica with growth opportunities for production and export.

Although exports have fluctuated between 2003 and 2008, peaking in 2006 at US\$10.6m, it has comprised on average 7% of non-traditional exports, eclipsing other product categories such as sauces, dairy products, ackees and breads/biscuits/buns/cakes.¹⁹ Crustaceans have been identified as an emerging product and could become a star performer with consistent production levels and improved quality standards.

Aquaculture farms are concentrated in plains of Clarendon and St. Catherine, contributing to regional development within Jamaica.

Aquaculture is subsumed within a larger category Agriculture, Fishing and Forestry, which contributes US\$14.5m to GDP, equivalent to 5.9%.²⁰

The greatest challenges and opportunities for the sector may be addressed with a few priority initiatives identified in the action plan that are focussed on (a) farming practices and the certification of the facilities (b) feed and stock as primary inputs for the operations (c) security and (d) import controls.

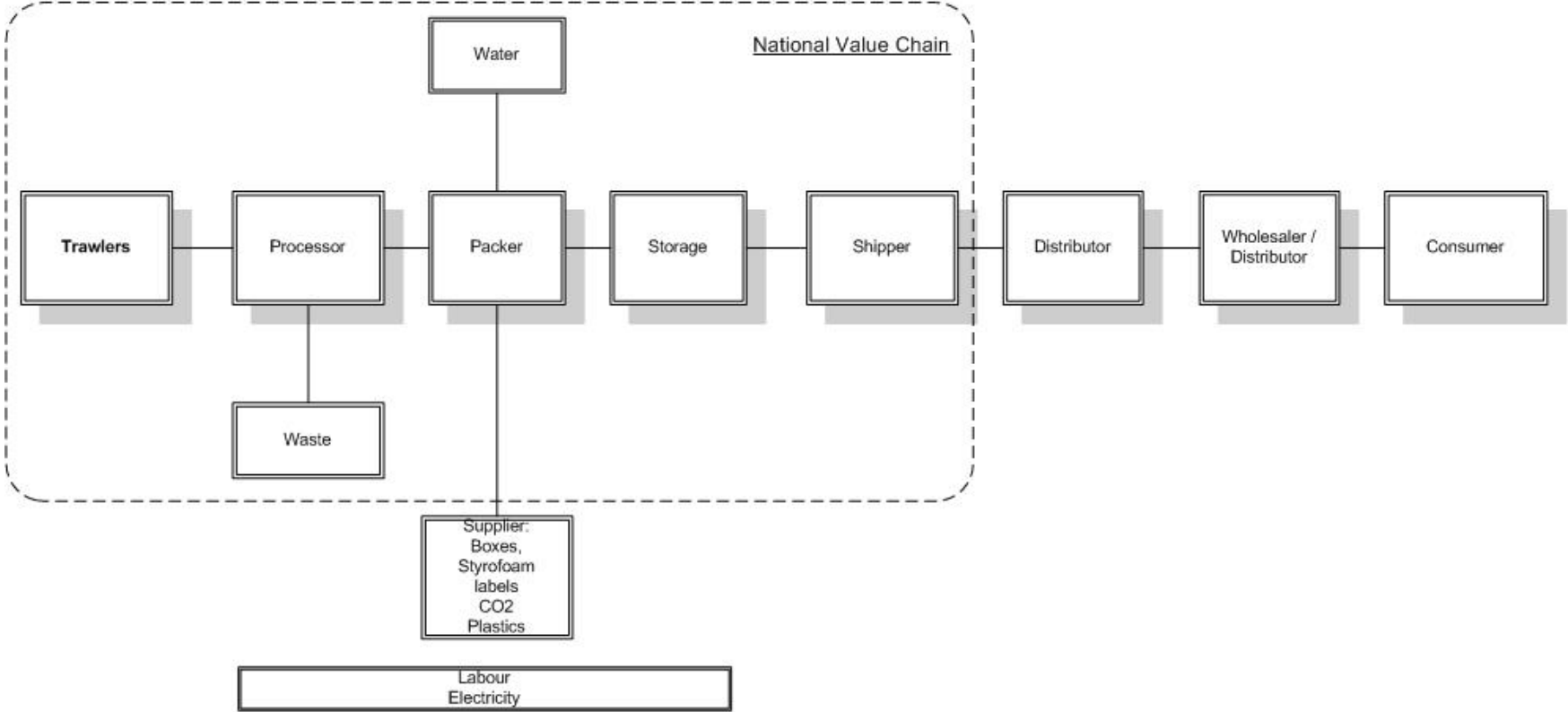
Objectives

- To improve production efficiencies, while reducing costs of production, resulting in:
- Improved growth rate of fish by 10-20%,
- Improved feed conversion (from 2 to 1.5);
- To increase profitability of firms by 20%;
- To increase recovery from 70% to 80% (world average) by 2011 by:
- Significantly improving brood stock quality (hardiness and fecundity), and
- Reducing losses from theft;
- To increase the export value by 15% annually;
- To increase the acceptability and accessibility of Tilapia as a main protein source.

¹⁹ Exports, 2003-2007 (Statistical Institute of Jamaica, 2008)

²⁰ Economic and Statistical Survey of Jamaica 2006 (Planning Institute of Jamaica, 2007)

Current Value Chain: **Marine Products**



Regulatory Requirements



Approaches

- 1. Packer - Retailer
- 2. Packer - Distributor - Retailer
- 3. Full chain as above

SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> Established product brands and very strong destination reputation. 	<p>Weaknesses</p> <ul style="list-style-type: none"> Very little collaboration among members of the sector. Few processors and roasters have international certifications. <i>The industry has not successfully told their story to drive sales, enhance social equity of the brand.</i> The industry standards and requirements do not include social and environmental standards, and so it may be perceived as weak in these areas.
<p>Opportunities</p> <ul style="list-style-type: none"> Opportunities exists for increasing use of current lands (fill gaps) to increase the production volume using currently dedicated lands 	<p>Threats</p> <ul style="list-style-type: none"> Low domestic consumption limits sales for business and industry growth. Heavy concentration in the Japan market

VISION

The Jamaican Coffee Sector is the global benchmark and standard of quality for the growing and processing of coffee for export.

DEVELOPMENT Perspective

The Jamaican Coffee Sector is promoting environmental sustainability by utilising environmentally friendly practices and fostering farmer welfare and increased community development programmes.

COMPETITIVENESS PERSPECTIVE

BORDER IN
(Supply-Side)

Coffee yields increased

Adaptive research in primary production increased

Research in product development and higher value waste alternatives increased.

BORDER
(Transaction/Cost of Business)

Farm and parochial roads improved .

Alternative pesticides & fertilisers sourced.

Credit / micro-lending for growers made available

Stock of seedling increased

Praedial larceny eliminated.

Crop insurance costs reduced.

BORDER OUT
(Demand-Side)

New markets Accessed.

Sector programme for increased brand promotion and market penetration developed.

CLIENT PERSPECTIVE

TRADE INFORMATION

Data for decision making made available.

QUALITY & STANDARDS MANAGEMENT

Quality Management Systems and Environmental Management Systems certification applied

Business & Technical Competency

Competency training and counselling provided

Marketing competency of processors and roasters improved

FINANCE

Affordable and accessible finance made available.

PACKAGING
Affordable quality export packaging made available locally

Institutional Perspective

The Coffee Industry Board of Jamaica (CIB) and the Coffee Exporters Association are the primary vehicles for coordinating policy initiatives and implementing the sector development plan.

SWOT Analysis

Strengths <ul style="list-style-type: none">▪ Established product brands and very strong destination reputation.	Weaknesses <ul style="list-style-type: none">▪ Very little collaboration among members of the sector.▪ Few processors and roasters have international certifications.▪ <i>The industry has not successfully told their story to drive sales, enhance social equity of the brand.</i>▪ The industry standards and requirements do not include social and environmental standards, and so it may be perceived as weak in these areas.
Opportunities <ul style="list-style-type: none">▪ Opportunities exists for increasing use of current lands (fill gaps) to increase the production volume using currently dedicated lands	Threats <ul style="list-style-type: none">▪ Low domestic consumption limits sales for business and industry growth.▪ Heavy concentration in the Japan market

COFFEE			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE DEVELOPMENT PERSPECTIVE			
<i>The coffee industry minimises the negatives impact of growing practices on the environment</i>	Environmental standards developed	Completed in Y1	<ul style="list-style-type: none"> ▪ Produce and disseminate technical manuals for the promotion of agro Forestry and intercropping, and provision of technical services for their implementation. ▪ Promote organic coffee farming ▪ Develop environmental standards for growers, dealers, processors and roasters (to be included in industry manual), and obtain support for standard implementation.
<i>Investment is attracted into the sector to enhance competitiveness and capacity.</i>	% of investment opportunities attracting investment	50%	<ul style="list-style-type: none"> ▪ Prepare investment opportunity profiles for NBM & BM coffee that include: <ul style="list-style-type: none"> ○ Cost of production models (mono/intercropped/agro forestry) ○ Current partnership opportunities ▪ Survey coffee regions and develop an inventory of idle land & abandoned farms that may be put in production and promoted for investment. ▪ Match prospective growers and land owners to facilitate increased production
<i>Sector's economic contribution</i>	Production output Yield	980 kg per hectare	<ul style="list-style-type: none"> ▪ Promote best practices among growers in order to foster improvement in labour productivity through the best farmer award (Denbigh) ▪ Increase the provision of technical information and support to growers that is required to increase production Yield
THE COMPETITIVENESS PERSPECTIVE			
<i>BORDER –IN:</i>			
<i>Sector Diversification</i>			
<i>The coffee sector increases domestic value addition</i>	Number of value added product developed for commercialisation	2	<ul style="list-style-type: none"> ▪ Obtain resources for product research to identify: <ul style="list-style-type: none"> ○ value added products that are feasible for introduction into operations ○ higher value alternatives for waste (such as briquettes)
<i>Capacity development</i>			
<i>There is increased yield (output) resulting from improved practices and efficiencies</i>	Production output Yield	980 kg per hectare	<ul style="list-style-type: none"> ▪ Increase adaptive research conducted on the density and planting systems, nutrition management and Coffee Berry Borer management, to transform the efficiency of the sector. ▪ Increase the stock of seedlings, while providing seedlings of a larger size
<i>The Jamaican Coffee Industry is recognised as the</i>	TBD	TBD	<ul style="list-style-type: none"> ▪ National Industry Standards manual expanded to cover: <ul style="list-style-type: none"> ○ Completion of technical manual related to production: from farm to cup ○ Development of environmental standards

COFFEE			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
global industry standard			<ul style="list-style-type: none"> ○ Health and safety standards ○ Social standards, such as employment, wage minimums/ farm gate prices, etc.
BORDER			
Cost of Doing Business			
There is improved infrastructure and business environment for growers and processors to enhance revenue	% of farm roads targeted that are improved	50%	<ul style="list-style-type: none"> ▪ Advocate GoJ to improve farm and parochial roads in order to significantly improve access to farms and national production and sales.
			<ul style="list-style-type: none"> ▪ Facilitate and promote alliance to source and purchase alternative pesticides & fertilisers to reduce the current high costs
			<ul style="list-style-type: none"> ▪ Advocate for increased availability of credit / micro-lending for growers to finance their production. ▪ Advocate for processors to secure more favourable cost and access to working capital
	Programme redesigned		<ul style="list-style-type: none"> ▪ Engage stakeholders in review and design of crop insurance program
Crime			
	% reduction in loss due to theft	50%	<ul style="list-style-type: none"> ▪ Initiatives to reduce Praedial larceny are more effective, reducing loss from theft.
BORDER-OUT			
The sector benefits from an improved branding and marketing programme	% increase in export sales	20%	<ul style="list-style-type: none"> ▪ Establish a team to design and implement a sector programme for increased brand promotion and market penetration that includes (brand building exercises, developing and telling the story of the product and industry, creative market promotions based on opportunities that exists, such as country promotion of other sectors.)
Sector Promotion			
International	As above		<ul style="list-style-type: none"> ▪ Generate and communicate positive messages about the brand ▪ Identify and recruit branding and marketing expertise for the sector's programme. ▪ Determine/validate market positioning & promotion strategy ▪ Maintain and improve our relationship with Japanese Importers
Domestic – tourism	% increase in tourism sales	15%	<ul style="list-style-type: none"> ▪ Design and execute a promotional campaign targeting buyers at all ports (air & sea) that includes partnering with retailers on supporting promotional activities. ▪ Develop a promotional campaign to be integrated into Restaurant Week ▪ Create linkage with HEART Runaway Bay to train hospitality staff in coffee

COFFEE			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
			<ul style="list-style-type: none"> preparation & terminology Initiate training program in hotel sector
THE CLIENT PERSPECTIVE			
<u>Business and Export Competency</u>			
Increased participation in exports in the sector, and improved export performance of enterprises	% of roasters and processors participating	80%	<ul style="list-style-type: none"> Design and deliver and export awareness and readiness programme for the sector. Inform the enterprises of export agencies and their services.
Sector enterprises improve business management and marketing	Service delivered	Y1	<ul style="list-style-type: none"> Identify relevant programmes and support agencies for enhancing business (management) and marketing competencies within firms, and provide comparative information to firms.
<u>Quality Management</u>			
The Jamaican Coffee Industry is recognised as the global industry standard	standards and support programmes developed	Completed in Y1	<ul style="list-style-type: none"> Execute a certified seed program for private coffee nurseries Complete / Enhance a Quality Manual from farm to cup Improve ability of coffee growers to meet market requirements Collaborate with relevant entity(s) and lobby for certification of Coffee Extension Agent Create curriculum for certification of Coffee Extension Agent Provide technical and financial support to firms to address the lack of QMS and EMS certification which are critical to the future of the industry.
<u>Trade Information</u>			
			<ul style="list-style-type: none"> Develop and disseminate market reports for the sector to provide firms with data for decision-making
<u>Other Trade Support Services</u>			
			<ul style="list-style-type: none"> Identify packaging and labelling expertise as a support service for the industry.
THE INSTITUTIONAL PERSPECTIVE			
			<ul style="list-style-type: none"> Provide support for cluster development to facilitate collaboration among enterprises within the sector.
			<ul style="list-style-type: none"> CIB to strengthen its network and relationships
CIB diversifies and			<ul style="list-style-type: none"> Modify the Cess order to include Imports of coffee

COFFEE			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
<i>expands its revenue streams</i>			

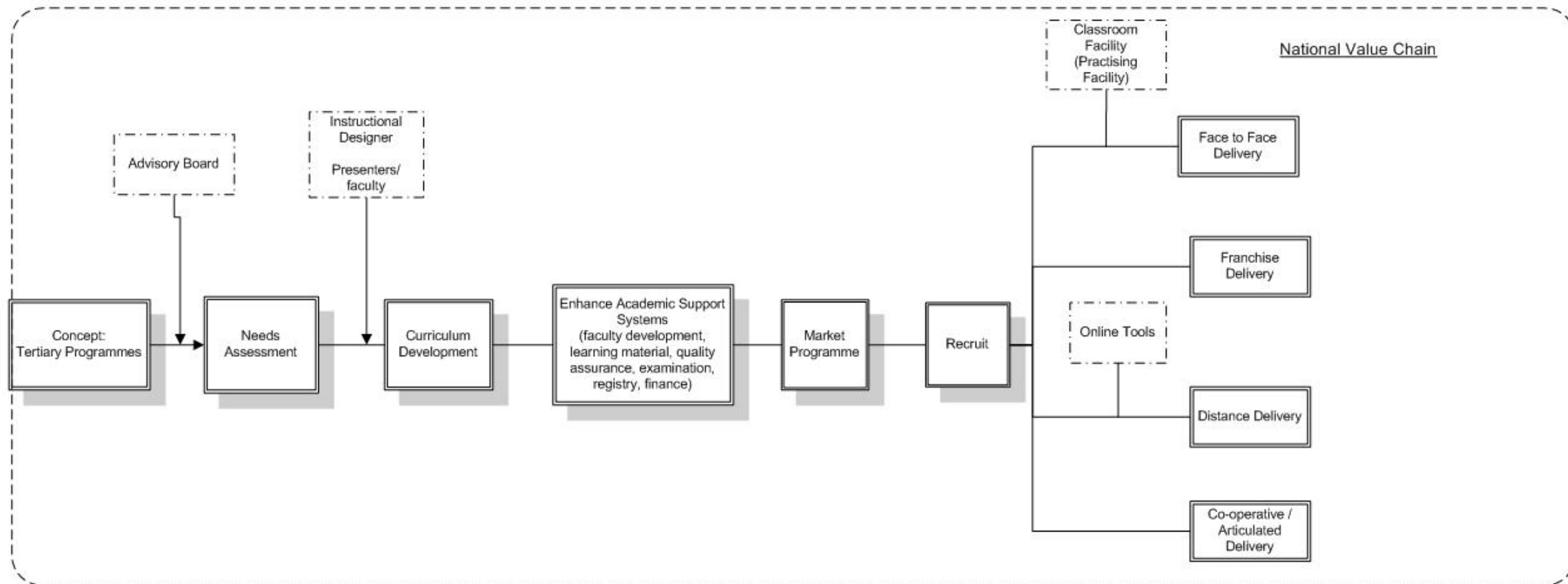
Education

Jamaica has an active and vibrant education industry with strong growth potential. There are a number of well-established public and private institutions and a range of study offerings in an attractive location. By building on these strengths, Jamaica could develop a viable education export industry capable of providing significant foreign exchange earnings. The country has the potential to become a destination for students interested in university degree programmes, specialised professional and vocational training and ELT.

Objectives

- Export earnings of over US\$30 million
- 1,000 additional extra-regional students at tertiary institutions with differential fee structures per year. These institutions include UWI, Mico and NCU.
- 1,000 additional regional students at tertiary institutions with homogenous fee structures per year. These institutions include the University of Technology (UTech), the UCC and the International University of the Caribbean (IUC).
- Attract 3 foreign ELT providers to Jamaica and increase the number of ELT students by 500.

Current Business Model: Education Services



SWOT Analysis

<p><u>Strengths</u></p> <ul style="list-style-type: none"> ▪ Available pool of Quality academic administrators to develop policy, standard operating procedures, systems ▪ Jamaican programmes have high mobility in terms of articulation and accreditation ▪ Extra-curricular and professional programmes, such as athletics (UTech). ▪ High mobility (articulation and accreditation) 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> ▪ No tracer studies have been done to establish benchmarks that may be used to advise policy, programme design, benchmarking or promotion. ▪ Capital investment for the sector – as an attractive investment sector.
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> ▪ The further development of the academic administrators through global discussion and networks to enhance programmes through best practice adoption and a global perspective ▪ Diversification of the bed & breakfast accommodation subsector and real estate rental industry for foreign students. ▪ Linking programmes of study based on our unique factors. ▪ Recognition of quality professional and demand for these which could be translated to the quality of our training institutions. ▪ May capitalise on the strength of extra-curricular and professional programmes eg. Athletic training 	<p><u>Threats</u></p> <ul style="list-style-type: none"> ▪ Limited funding from both public and private sources to facilitate growth and expansion of the sector.

Education Strategy Map

VISION

Jamaica is a preferred education destination offering quality programmes in specialised areas

DEVELOPMENT Perspective

The sector provides a range of full-time and part-time employment opportunities through establishment of new institutions and diversification of programme offerings

**COMPETITIVENESS
PERSPECTIVE**

**Supply-Side
(BORDER IN)**

Increased capital investment in the sector

Trained and certified pool of experts for service delivery increased.

**Transactions/
Cost of Business
(BORDER)**

Crime reduced thus lessening its impact on customer perception of the destination.

**Demand-Side
(BORDER OUT)**

Awareness of Jamaica as a destination for education Increased.

Education destination marketing support provided.

**CLIENT
PERSPECTIVE**

**TRADE
INFORMATION**

Information of global training needs and trends provided.

**QUALITY &
STANDARDS
MANAGEMENT**

Institutions continue to focus on quality of programmes, trainers/educators and facilities.

**Business & Technical
Competency**

Instructional Design capabilities in priority specialised areas are enhanced.

FINANCE

Affordable and accessible financing provided for continuous improvement of institutions.

Institutional Perspective

The Jamaica Coalition of Services Industries is established as the focal point for coordinating support to the sector including engagement of the Jamaica University Steering Committee for development and promotion.

EDUCATION			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE DEVELOPMENT PERSPECTIVE			
<i>To increase the levels of export-oriented investment in the sector</i>	Number of FDI projects in the Education sector # of ELT students studying in Jamaica	4 500	<ul style="list-style-type: none"> ▪ Investment attraction in educational facilities and for international institutions to establish here in a range of specialised areas identified <ul style="list-style-type: none"> • Attract 3 foreign ELT providers to Jamaica • Attract investment in private medical training • Attract partners in criminology studies ▪ Target investment for executing the Knowledge City concept
THE COMPETITIVENESS PERSPECTIVE			
<i>BORDER –IN: (Value Chain Development)</i>			
<i>Improved range and quality of programmes that are offered by tertiary institutions</i>	# of additional regional students at tertiary institutions with homogenous fee structures per year. # of additional extra-regional students at tertiary institutions with differential fee structures per year.	1,000 1,000	<ul style="list-style-type: none"> ▪ Develop products that international students would be interested in. for e.g. cultural studies <ul style="list-style-type: none"> • Train educators / attract practitioners to offer instruction in these areas ▪ Promote ESL / ELT as a priority focus for institutions based on the market potential. ▪ Enhance universities' cooperative education, including internships, positioning / promoting Jamaica as a location for overseas cooperative options. ▪ Provide support to attract funding for individual or common (first-rate) library – as this is a hurdle for accreditation ▪ Review Dubai Knowledge City model among others to develop a best of breed model for Jamaica
<i>BORDER</i>			
<i>Crime</i>			
<i>To increase the number of foreign students in Jamaica</i>	as above	as above	<ul style="list-style-type: none"> ▪ Advocate for instituting proposed interventions to address crime, and participate in initiatives where appropriate
<i>Trade Facilitation</i>			
<i>To increase the number of foreign students in Jamaica</i>	as above	as above	<ul style="list-style-type: none"> ▪ Examine the work permit regime to make it comparable to that operated by the UK. ▪ Improve the student visa and work permit regime by streamlining visa application procedure for students and firms to ensure that this process

EDUCATION			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
			does not act as a bottleneck.
Infrastructure			
<i>To increase the number of foreign students in Jamaica</i>	as above	as above	<ul style="list-style-type: none"> ▪ Provide incentive to home-owners for student rentals to assist in addressing the housing shortage for international students ▪ Develop investment proposals for student housing
BORDER-OUT			
Sector Promotion			
<i>Jamaica is perceived globally as a preferred education destination</i>	as above	as above	<ul style="list-style-type: none"> ▪ Conduct groundwork to determine what considerations are required for ranking and how this may be instituted (regionally or nationally to get on international lists)
			<ul style="list-style-type: none"> ▪ Develop a 'Study in Jamaica' website.
THE CLIENT PERSPECTIVE			
Client Focus			
<i>Increased engagement in export activities</i>	Number of institutions actively exporting (any mode)	10	<ul style="list-style-type: none"> ▪ Conduct export awareness programmes for the sector to encourage and foster exports ▪ Provide export-readiness training and upgrading to institutions to facilitate export activities.
Finance			
			<ul style="list-style-type: none"> ▪ Assistance to access financing for constructing and operating state of art classrooms (that could be used for distance learning using the master teacher model). The costs for acquiring are prohibitive, and are high for operations, since it is internet driven there is a usage rate.
Trade Promotion			
<i>Same as sector promotion</i>	<i>Same as sector promotion</i>	<i>Same as sector promotion</i>	<ul style="list-style-type: none"> ▪ Raising the profile of local universities using a multi-faceted approach through the following initiatives: <ul style="list-style-type: none"> • Develop strategic alliances with foreign universities to offer combined programmes and offering partial scholarships to a select few top foreign students. • Individual institutions international promotion of their programmes. ▪ Trade promotion service providers to include the sector in client targeting and servicing.
THE INSTITUTIONAL PERSPECTIVE			
<i>To strengthen the</i>			<ul style="list-style-type: none"> ▪ Provide support to strengthen the Jamaica University Steering Committee

EDUCATION			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
<i>management structure for the sector's development and the level of networking and cooperation in the sector</i>			Consortium <ul style="list-style-type: none"> ▪ Foster increased institutional collaborations (such as UCC/UTech MOU and articulation agreement between UCC-UWI). ▪ Facilitate collaboration to develop an inventory of programmes to be used as a strategic input for the sector.

Entertainment

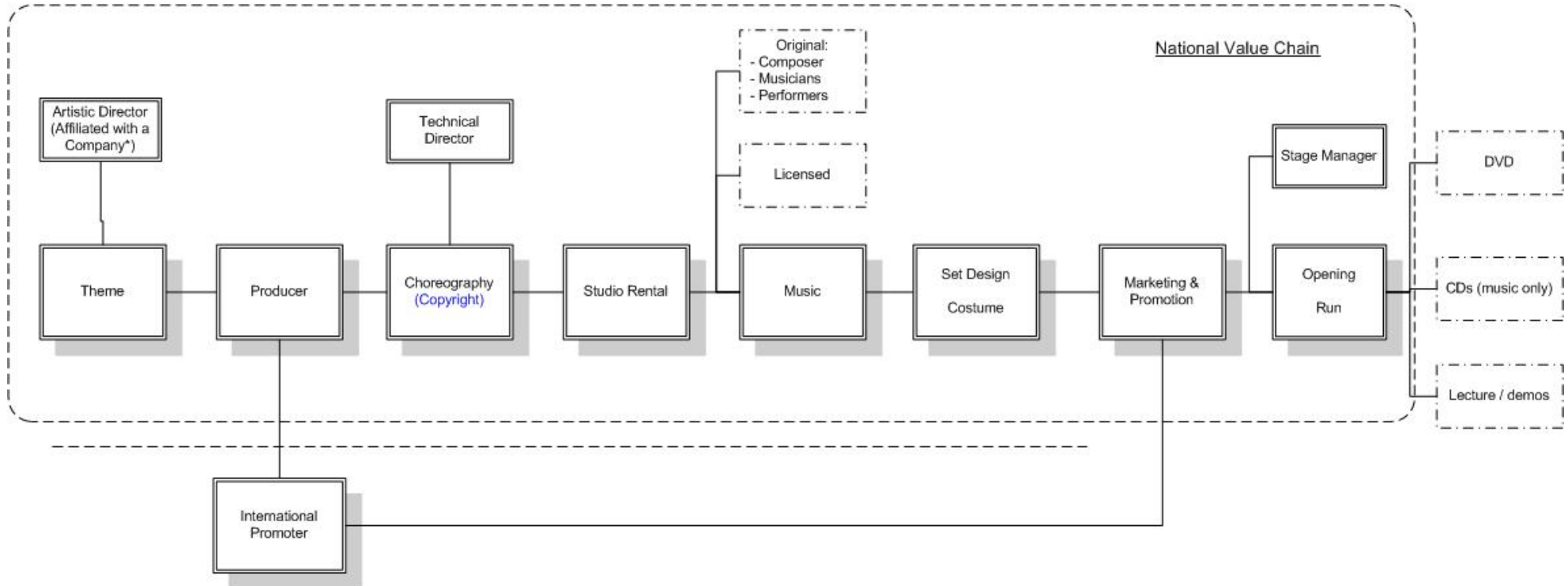
Jamaica is known globally for its cultural and creative industries, which are a major contributor to the local economy. A recent study indicated that the Copyright Sector contributes about 5.1% to the GDP of Jamaica, and accounts for 3.0% of all employment in Jamaica.

Within the creative Industries, Dance, Drama, Film and Music are among the strongest export services and have the greatest potential to promote our culture and creativity. Various reports on the Music industry place the employment estimate between 6,000 and 15,000 with estimates of export earnings as high as USD100million. Film location projects alone may contribute USD14million in the local economy, with 1,500 – 2,500 employees who also export their services.

Current Value Chain: **Dance**

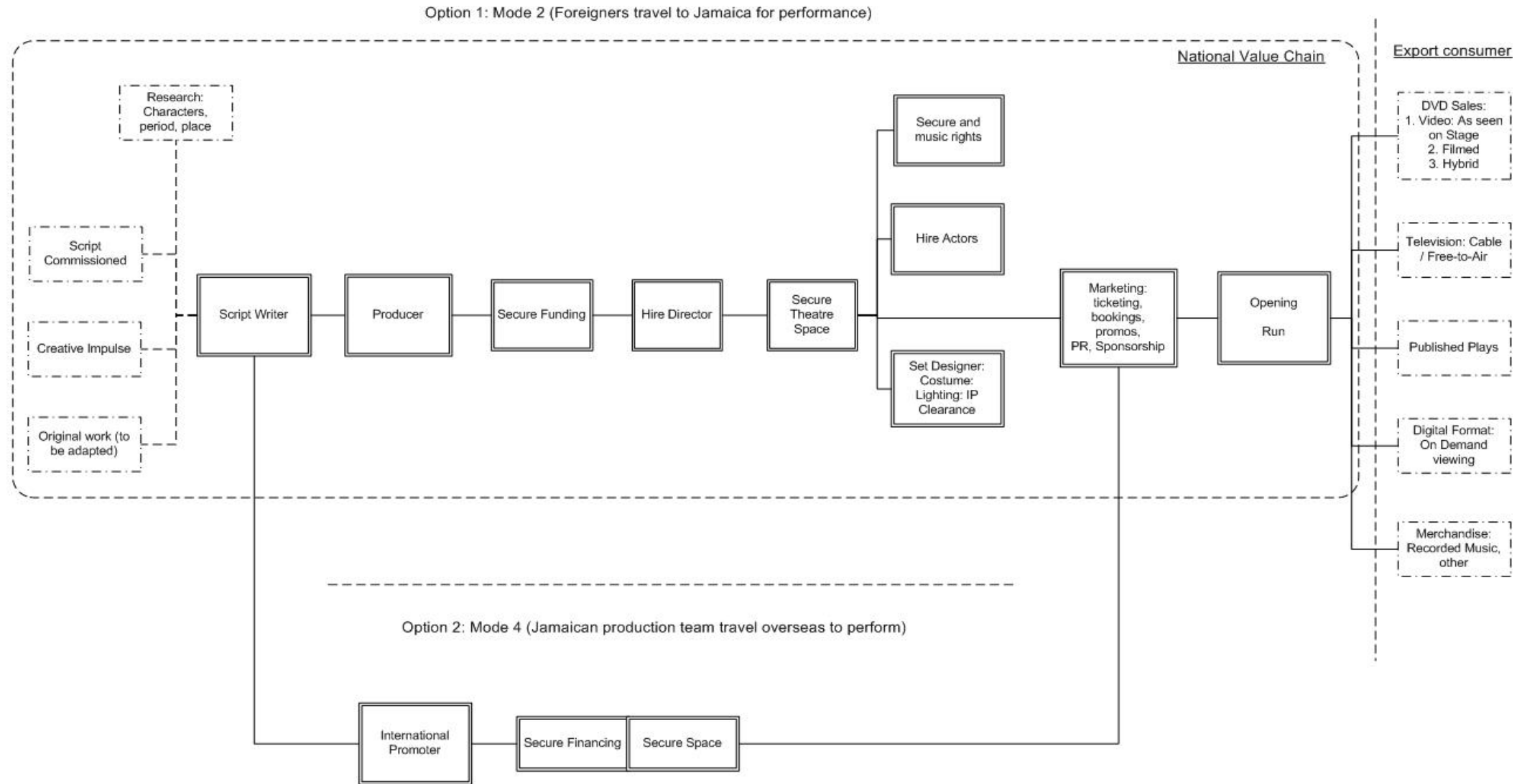
Option 1: Mode 2 (Foreigners travel to Jamaica for performance)

Option 2: Mode 4 (Jamaican dance company travel overseas to perform)



* A Company is typically headed by the Artistic Director, and has member dancers.
There are four major companies in Jamaica: NDTC, L'Acadco, The Company & Movements

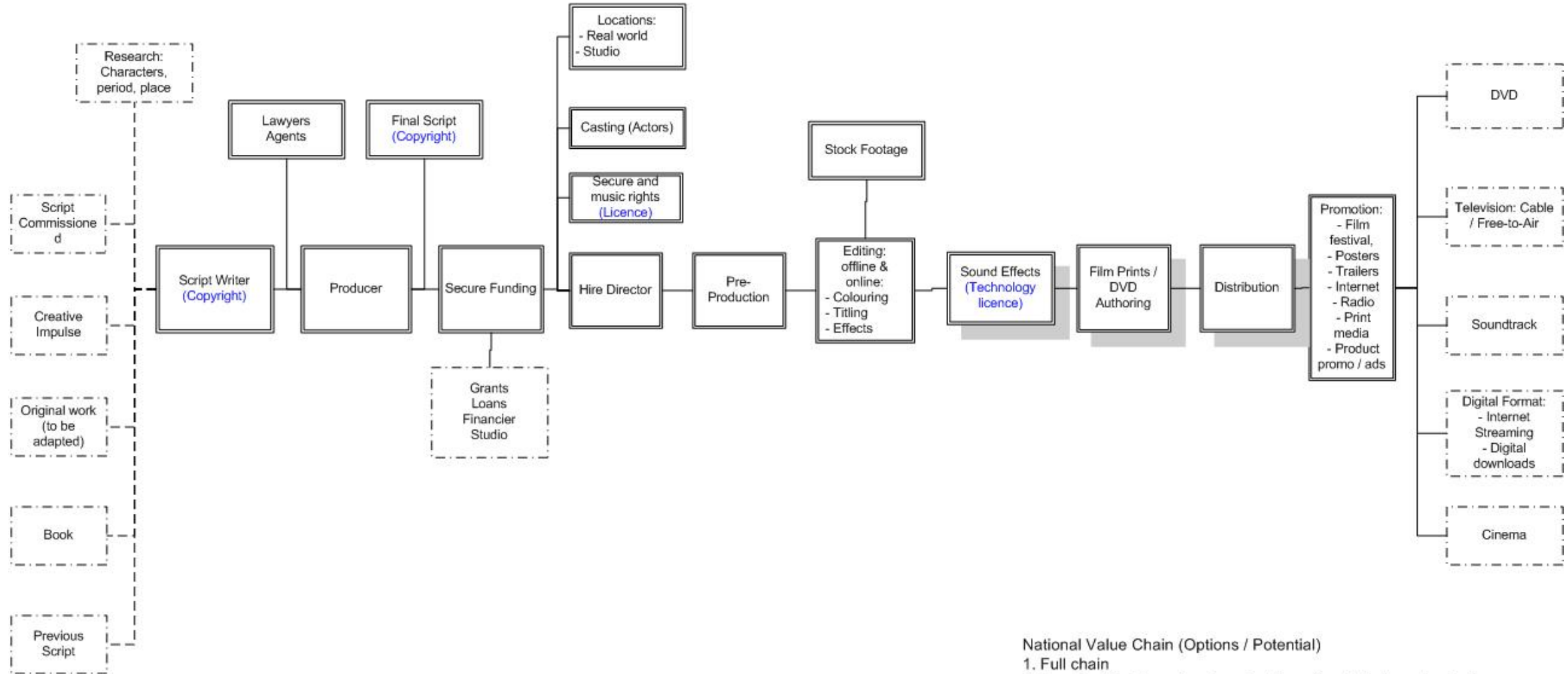
Current Value Chain: Drama



Current Value Chain: Film

Models:

1. Feature Film, TV, Documentary
2. Production Company / Music Video

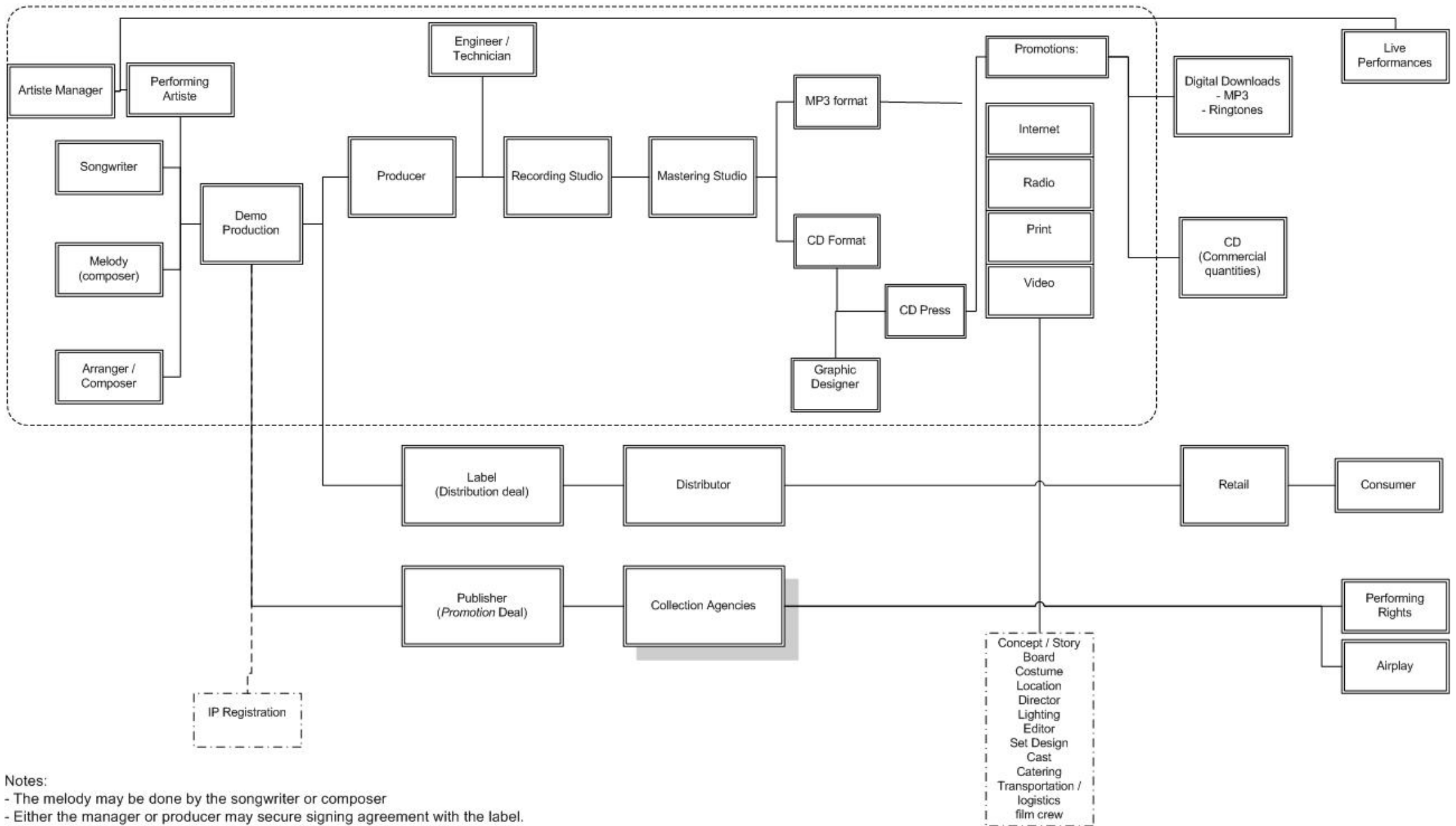


National Value Chain (Options / Potential)

1. Full chain
2. Location for international project (Location, talent, production)
3. Soundtrack
4. Stock Footage
5. Talent
6. Script (Idea)

Draft Business Model: **Music**

National Value Chain



Notes:

- The melody may be done by the songwriter or composer
- Either the manager or producer may secure signing agreement with the label.

SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ An abundance of talent in each of the sub-sectors. ▪ <i>Creative source</i> <ul style="list-style-type: none"> ▪ <i>Abundant talent</i> ▪ <i>World-class achievements</i> ▪ <i>Varied and valuable cultural and heritage resources</i> ▪ <i>Increased collaboration between tourism, cultural, entertainment and sports sectors</i> ▪ <i>Strength of “Brand Jamaica”</i> ▪ <i>Modern copyright regime in place; Jamaica party to relevant IP agreements/international treaties</i> 	<ul style="list-style-type: none"> ▪ Lack of appropriate and sufficient venues for the performance sub-sectors. ▪ Absence of a film studio that meets minimum global industry standards. ▪ Inadequate intellectual property framework for protection, valuation and management of works resulting in limitations in (i) monitoring and penalising for infringements (ii) valuation and use of collateral (iii) commercial management for optimal revenue. ▪ In most sub-sectors the absence of a listing of qualified professionals for accessing/contracting them. <ul style="list-style-type: none"> ▪ <i>Insufficient measurement and monitoring of sector</i> ▪ <i>Insufficient capacity and financial support for institutions and infrastructure for culture and world-class entertainment industry</i> ▪ <i>High levels of piracy</i> ▪ <i>Insufficient regard and respect for the worth and economic value of creative industry professions and professionals</i> ▪ <i>Limited capacity to enforce intellectual property rights</i> ▪ <i>Insufficient knowledge of, support by and benefit by stakeholders of existing rights management systems</i> ▪ <i>Insufficient business management capacity in creative industries</i> ▪ <i>Inadequate institutional financing for creative ventures</i> ▪ <i>Insufficient budgetary allocation for development of the sector</i> ▪ <i>Inadequate human resource development for creative industries</i> ▪ <i>Insufficient incentive for retention/holding earnings from creative industries in Jamaica</i> ▪ <i>Gaps in existing rights management system</i> ▪ <u><i>Inadequate linkages with other economic sectors</i></u> ▪ <i>Fragmentation, lack of coordination and duplication of roles among agencies</i> ▪ <i>Inordinate delay in implementing some treaties through domestic law and reform of other relevant laws</i>

Opportunities	Threats
<ul style="list-style-type: none"> ▪ Growth in economic value of global cultural industries and markets ▪ Growth of media channels and demand for content (In videogames there is also an emerging trend where Damian Marley and Wayne Marshall both landed deals for the inclusion of their music on the soundtrack of the world's best selling videogame - EA Sports' FIFA 2006 and FIFA 2005 respectively. The negotiation of ring tone contracts is another lucrative area that is still evolving, but from which Jamaican artists stand to benefit significantly.) ▪ Development of bilateral and international agreements for intellectual property rights and support for creative industries ▪ Value of Internet in creating new markets, business opportunities and channels for exposure and distribution of cultural products ▪ Cheaper and more user- friendly technology ▪ Widening of the regional market through CSME ▪ Existence of West Indian Diaspora as market for local creative products ▪ High awareness of and demand for "Brand Jamaica" ▪ Brand Jamaica through Jamaican music continues to be in demand, with the increased use of reggae in the soundtracks of feature films and advertisements in North America. 	<ul style="list-style-type: none"> ▪ The copying and adaptation of the Jamaican style and genres by non-Jamaicans that is eroding our share in formerly indigenous areas (e.g. international reggae artistes, reggaeton (also reguetón and reggaetón), popularised dances) <ul style="list-style-type: none"> ▪ Potential loss of comparative advantage in Jamaican cultural products through increased quality and use by other countries of Jamaican symbols and arts ▪ Potential erosion of geographic indicators for Brand Jamaica through imitation by competitors ▪ Low degree of local ownership and control of creative industries resulting in low retention of value-added ▪ Increasing use of technology reduces creative input of performers and artistes ▪ Low level of understanding by Jamaican private sector of business intricacies of creative industries ▪ The negative implications of including creative industries in the WTO trade regime ▪ Impact of negative activities on the image of Jamaica

Entertainment Strategy Map

VISION

Jamaica's Creative Industries is a sustainable contributor to the economy with optimal financial benefits being realised from our intellectual property

DEVELOPMENT Perspective

Jamaica's Creative Industries contributes significantly to employment generation through new enterprise development in the Entertainment and related sectors, achieving greater participation in the economy by individuals particularly from inner-cities and rural communities.

**COMPETITIVENESS
PERSPECTIVE**

**Supply-Side
(BORDER IN)**

Appropriate entertainment venues constructed.

Model for acceptance for creative works as collateral established.

Business and professional practices by enterprises improved.

**Transactions/
Cost of Business
(BORDER)**

A well developed and accepted IP framework in place.

Financial institutions perception of to the sector altered.

**Demand-Side
(BORDER OUT)**

New (and innovative) marketing and distribution channels developed.

local marketing and distribution channels increased.

**CLIENT
PERSPECTIVE**

**TRADE
INFORMATION**

Updated listing of global business opportunities maintained.

Information on market trends and potential buyers provided.

Quality Management

Culture of professionalism established and maintained

Business & Technical Competency

Business services provided to support the formalisation of entities

Access to professional training expanded across the island

Effective royalty collection and payment systems maintained.

FINANCE

Financing tools specific to the sector introduced.

IP accepted as collateral.

Institutional Perspective

The Creative Industries Clusters are recognised focal points for the activities of their stakeholders ensuring alignment to eliminate duplication of services and supporting enhanced collecting societies and a duly established Council for the Arts.

ENTERTAINMENT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE DEVELOPMENT PERSPECTIVE			
The Creative Industries increases contribution to GDP	Percent contribution to GDP % increase in royalty fees collected	(baseline TBD)	<ul style="list-style-type: none"> ▪ Improve mechanisms for collecting royalties: <ul style="list-style-type: none"> • Negotiate bilateral agreements with key markets such as Italy, Germany, France • Facilitate registration of artistes with appropriate collection agencies ▪ Conduct workshops and provide information material to increase awareness of artistes' on intellectual property rights and collection mechanisms ▪ Conduct awareness and training to reduce IP violations in Jamaica ▪ Facilitate linkages with tourism by staging increased events in partnership with hotels and cruise ports
	# of new firms in the industry registering their businesses	30	<ul style="list-style-type: none"> ▪ Provide assistance to entities to facilitate their formalisation: <ul style="list-style-type: none"> • Business registration • tax and accounting systems • business planning and business advisory support
Increased capital and infrastructure investment			<ul style="list-style-type: none"> ▪ Develop, package and promote investment opportunity for a mixing studio for local or foreign investment ▪ Develop, package and promote investment opportunity for a film studio for local or foreign investment
THE COMPETITIVENESS PERSPECTIVE			
<u>BORDER –IN</u>			
<u>Capacity Development</u>			
Enhance capacity exists in Jamaica to train the relevant personnel to international standards to maximise their earning potential	The location of training institutions across Jamaica (with Registration, accreditation, physical facilities, locations)	3	<ul style="list-style-type: none"> ▪ Expand the reach of training institutions in Jamaica by introducing new locations, and enhancing their capacity
	The number of registered training institutions and accredited	Baselines to be refined based on audit	<ul style="list-style-type: none"> ▪ Develop and execute relevant (internationally accredited) programmes for the industry (in fields such as artiste management, theatre) – and that covers development of the trainer core

ENTERTAINMENT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
	programmes available to the entertainment sector		
	The number of qualified / certified professionals in the entertainment sector (to be further detailed)	<i>Baselines to be refined based on audit</i>	<ul style="list-style-type: none"> Design and implement apprenticeship initiatives - especially in technical fields, such as mixing.
			<ul style="list-style-type: none"> <i>Obtain funding for initiatives aimed at community and cultural groups</i>
Improved technical skills in the industries	The number of qualified / certified professionals in the entertainment sector (to be further detailed)	<i>Baselines to be refined based on audit</i>	<ul style="list-style-type: none"> Develop and execute (Music) engineers training and certification programme. Develop and execute (Film) Producer training programme
(Film) Increased creation of Good Jamaican-themed products based on our stories with international marketing potential	# of completed full length feature film scripts per year	5	<ul style="list-style-type: none"> Develop and execute 12 months programme to facilitate/follow the development of 5 feature scripts Encourage the financial backers to assist in the development of a Jamaican Film genre
(Film) Increased financing of local film projects so that ownership and distribution rights may be retained			<ul style="list-style-type: none"> Advocate the government to put investor and production initiatives and incentives in place. Provide support to firms to develop proper/bankable marketing plans to make investment attractive
Improved production skills exist to take quality of the Jamaican product to an international level	Industry possesses the required levels and quantities of skilled persons	Industry at desired standard in 5 years	<ul style="list-style-type: none"> Identify the skills required for self-sufficiency based on the capability that exists in the baseline year. Put in place an internship, training and development programme for the crews and persons interested in investing in the industry
Jamaica a self-sufficient production industry			

ENTERTAINMENT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
<i>and also a self-production destination</i>			
BORDER			
Cost of Doing Business			
<i>The costs of transactions and tools acquisition for the sector are reduced.</i>			<ul style="list-style-type: none"> ▪ Revise and update the Tools of the Trade Incentive
<i>“Payola” practice is eliminated</i>			<ul style="list-style-type: none"> ▪ Develop a partnership between the regulatory authorities, industry and media to develop and implement an initiative to eliminate the practice.
Intellectual Property			
			<ul style="list-style-type: none"> ▪ Review of current IP legislation to ensure that the scope of the industry is covered by the current framework, and if not any gaps are filled ▪ Conduct sensitisation sessions to inform firms of IP rights, assist firms in registering and other measure to protect those rights. ▪ Develop Business models for managing (and exploiting) IP rights and present models to firms through workshops and printed material.
Infrastructure			
<i>Jamaica has a multi-disciplinary state-of-the-art performing venue</i>	Venue constructed and operational	Year 3	<ul style="list-style-type: none"> ▪ Assess all performance venues (including those under construction or planned) to identify any gaps based on the recommended features and capacity ▪ Develop investment proposal for the development and construction of such a venue, to include proposed use and marketing plans.
BORDER-OUT			
Market Access			
			<ul style="list-style-type: none"> ▪ Explore new music distribution models for accessing markets that will be feasible for firms in the sector.
Sector Promotion			
			<ul style="list-style-type: none"> ▪ Provide greater support to be provided to overseas promotion of the sector: <ul style="list-style-type: none"> • Identify 2 trade shows for each sub-sector • Coordinate and execute an inbound mission to showcase the sector

ENTERTAINMENT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE CLIENT PERSPECTIVE			
Business & Export Competency			
<i>Improved business practices and higher levels of professionalism in the sector</i>			<ul style="list-style-type: none"> Design and deliver workshops on professionalism and business etiquette in creative industries
<i>Enhanced ability of cluster members to identify and take advantage of market opportunities domestically and internationally.</i>	# of programmes developed or enhanced	1 general (per year) 1 per sub-sector (per year)	<ul style="list-style-type: none"> Develop and implement General business management for the creative industries. Expand and enhance music business management programmes Expand and enhance Artiste development programmes Develop Film production programmes, with reputed institutions Formally train Music distribution executives and employees, and provide information on developments, trends and opportunities in this area
Finance			
			<ul style="list-style-type: none"> Service providers upgraded to provide hand-holding and counselling to creative enterprises in (i) developing grant proposals (ii) preparing and presenting business and investment proposals (iii) preparing and presenting sponsorship proposals (iv) preparing loan packages Creation of an incubator fund for creative enterprises (micro-small enterprises)
Trade Information			
<i>Firms are provided quality market information to facilitate market selection for events and related sales efforts</i>			<ul style="list-style-type: none"> Create and disseminate market specific reports that outline market size, potential and entry strategies based on channels.
			<ul style="list-style-type: none"> Post and Update business opportunities for services from the sector based on needs in linked industries (e.g. tourism sector opportunities, film projects, and events)
Business Opportunities			
	# of value creation	5	<ul style="list-style-type: none"> Document / package and disseminate business opportunities based on

ENTERTAINMENT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
	options that are commercialised # of firms undertaking value creation/addition activities towards expansion	10	<ul style="list-style-type: none"> value creation possibilities in sector chains Develop mechanisms for networking within and across sub-sectors and sectors
THE INSTITUTIONAL PERSPECTIVE			
<i>An effective national coordinating entity for the creative industries is developed</i>			<ul style="list-style-type: none"> Launch, empower and support an industry-wide policy framework and unit
<i>Royalties payment/collection entities are strengthened.</i>			<ul style="list-style-type: none"> Provide technical support to the collections agencies to improve effectiveness and efficiencies.

Fashion

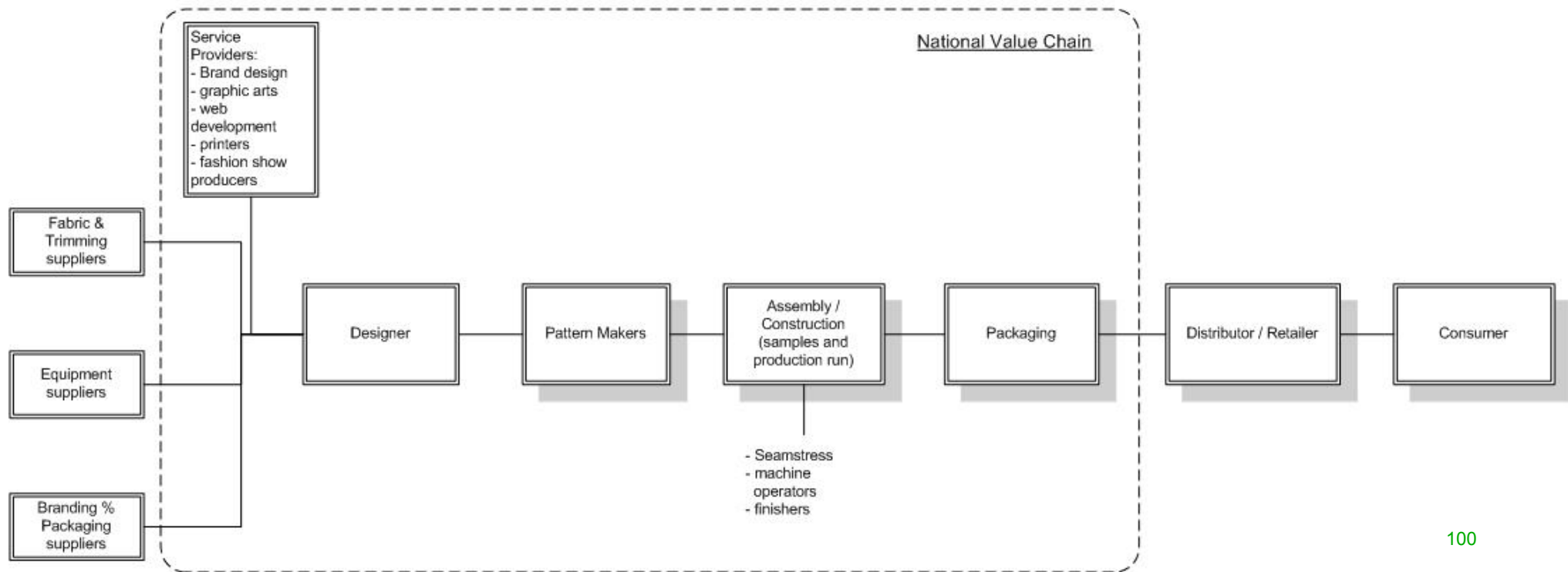
Jamaica's fashion industry also captures the vibrant and bold energy of its people, and may be considered the strongest goods producing sector in Jamaica's creative industries. As with other creative industries it provides the potential for regional development and the economic engagement of less advantaged groups – based on economic (poor) or education level – who may not easily find (have access to) traditional employment opportunities. Jamaica's total export figures for the apparel and jewellery sectors include items manufactured locally for international firms as well as the export of items not manufactured locally but not captured as re-exports, such as wristwatches, and the declining figures in these areas are felt to reflect the decline in outsourced production rather than the decline of local exports.

Objectives

- A strong national fashion cluster that will be sustained following the termination of the PSDP and its support.
- A competitive fashion sector producing quality garments to international-level standards to meet market demands.
- A nationally and regionally prominent industry based on the increased awareness of the Jamaican cluster

Increased production of locally designed and manufactured fashion products

Fashion: Value Chain



SWOT Analysis

<p>STRENGTHS</p> <ul style="list-style-type: none"> ▪ Strong national brand linked to creativity ▪ Creative and skilled designers ▪ Trained pool of workers in garment construction ▪ Presence of support institutions (though needs some strengthening) 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> ▪ New entrants lack the level of technical training previously available to persons who've now left the industry ▪ Productivity and focus on quality is often weak in workers who have been technically trained. ▪ Difficulty for designers to identify partners, and suppliers – particularly potential contractors who have been trained. ▪ Poor quality fabrics and limited range in trimmings. ▪ Lack of innovation and creativity support in a somewhat structured way for the sector (particularly jewellery and accessories)
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> ▪ Jamaica may an outsourcing destination for some regional manufacturing based on availability of workers and factory space (however may not be competitive on cost and quality). ▪ Growing demand for Jamaican creative and design products – merchandise for entertainment product for example. ▪ Increased sales to the tourism market 	<p>THREATS</p> <ul style="list-style-type: none"> ▪ Emergence of competing cultural and ethical fashion brands globally ▪ Increasing availability of affordable fashion products ▪ Overseas mass as well as designer production of “Jamaican inspired” designs

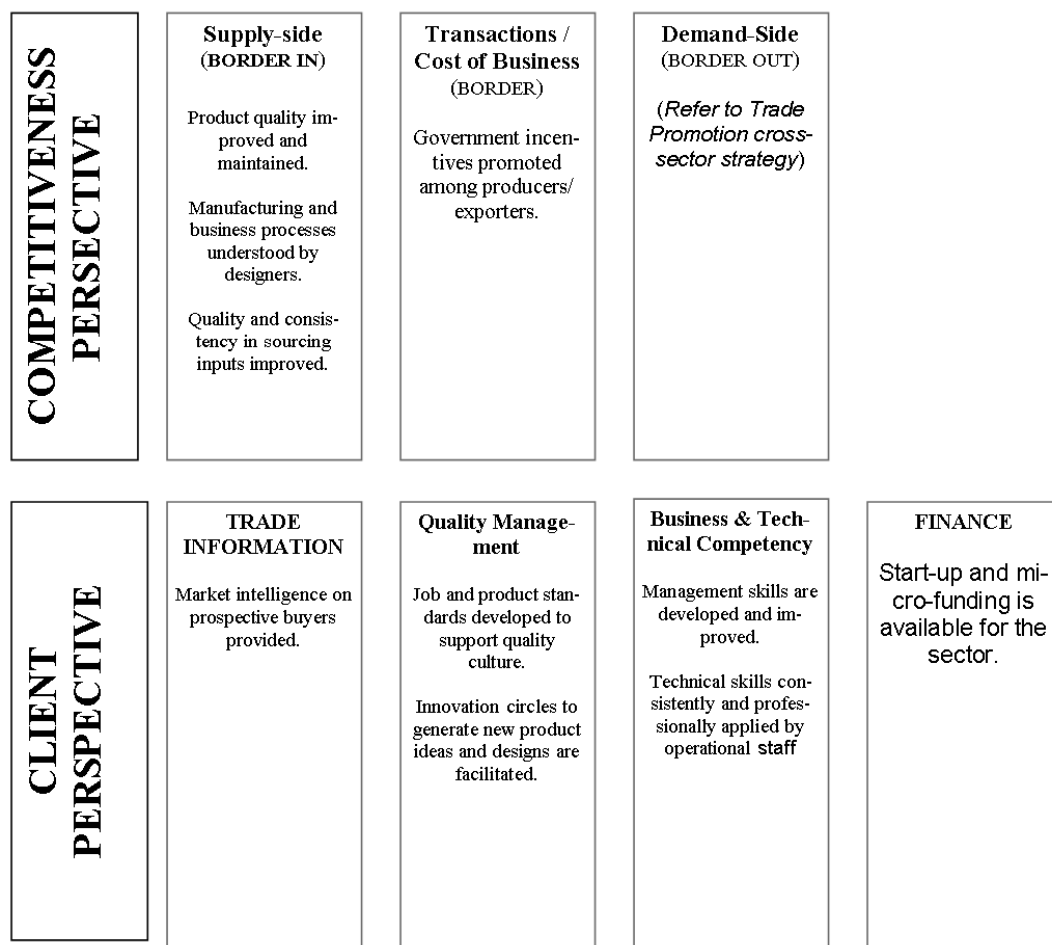
Fashion Strategy Map

VISION

Jamaica is the Fashion Centre of the Caribbean

DEVELOPMENT PERSPECTIVE

The Jamaican Fashion Sector has the potential to generate employment from new and existing enterprises and achieve greater participation in the economy by individuals, in particular women from inner-city and rural communities.



Institutional Perspective

The Jamaica Fashion and Apparel Cluster is the focal point coordinating the activities of professionals and technicians in the sector; benefiting from the sustained support of the trade support network, as well as standardised training programmes coordinated among relevant institutions.

FASHION JEWELLERY & ACCESSORIES			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE DEVELOPMENT PERSPECTIVE			
Investment			
<p>Increased availability to local designers of WISIC</p> <p>Greater local retention of the value of WISIC based on expansion of the value chain</p>	<p>Number of potential investment partners</p> <p>% increase of production of WISIC</p>	<p>5 potential partners identified</p> <p>20%</p>	<ul style="list-style-type: none"> ▪ Conduct feasibility study for the development of the WISIC value chain to engage in further processing in the region ▪ Depending on the feasibility study, promote and facilitate investment in the ginning and spinning of yarn for fabric production, including the identification of partners with a focus on new methods and targeting non-traditional spinners. ▪ Promote and facilitate investment for WISIC growing and production
Human Capital Development / Productivity			
<p>Increased levels of productivity and quality in the industry</p>	<p>Increase in output from the sector</p>	<p>Benchmark required</p>	<ul style="list-style-type: none"> ▪ Establish job classifications and performance standards for the industry ▪ Audit and document in a registry all skilled workers based on the industry job classifications ▪ Design and deliver training and certification to address gaps in worker skills ▪ Conduct productivity workshops for garment construction workers and designers
THE COMPETITIVENESS PERSPECTIVE			
BORDER –IN			
Capacity Development			
<p>Increased business support to designers for start-up and management</p>	<p>Number of firms accessing business support (back-office) services</p> <p>Number of areas in which support is developed</p> <p>Number of workshops held</p> <p>Number of workshop participants/ beneficiaries</p>	<p>Y1 - 25</p> <p>Y2 – 50</p> <p>3 support areas in Y1</p> <p>3 additional areas in Y2</p> <p>5</p> <p>40 firms</p>	<ul style="list-style-type: none"> ▪ Develop back-office support services for designers in priority areas ▪ Design and execute workshops in key business areas. ▪ Promote Enterprise Rating and Upgrading of firms to facilitate participation of all firms in the industry
<p>Improved production quality and output</p>	<p>Number of designers (a) linked to manufacturers or service providers, (b) establishing</p>	<p>15 (total)</p>	<ul style="list-style-type: none"> ▪ Design and execute workshop and training for designers on how (i) to manage external manufacturer relationships and contracts (ii) design, set-up and manage own manufacturing facilities. ▪ Design and execute workshop to manufacturers

FASHION JEWELLERY & ACCESSORIES			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
	own operations, or (c) participating in a group/cluster manufacturing arrangement		and construction service providers on sensitivities to the industry in order to improve response and order fulfilment <ul style="list-style-type: none"> ▪ Develop of a list of manufacturers and service providers that provide outsourcing services that is accessible. ▪ Design and execute quality management and control training for manufacturers and service contractors
Improved access to quality fabrics and improved consistency of supply	Number of suppliers assessed are providing improved quality Number of suppliers assessed improving consistency	2 2	<ul style="list-style-type: none"> ▪ Deliver sensitisation workshop with suppliers on the issues presented based on the quality and consistency in their fabric supply ▪ Develop and execute a supplier assessment to allow for monitoring and tracking of results, as well as service provision to suppliers. ▪ Facilitate relationships between suppliers and designers to have suppliers source globally for designers
BORDER			
Cost of Doing Business			
Reduced cost to establishing and operating a fashion enterprise	Number of designers benefiting from awareness initiatives	50	<ul style="list-style-type: none"> ▪ Deliver workshop for designers about the incentives and how to access these.
	Number of entities receiving assistance to seek grant funding		<ul style="list-style-type: none"> ▪ Inform firms of grant funding opportunities and provide hand-holding sessions to assist with applications.
BORDER-OUT			
Market Access			
			<ul style="list-style-type: none"> ▪ Strengthen participation of the sector in the JMA /JEA Trade shows ▪ Facilitate trade missions to potential markets geared to buyer markets, while assessing supplier constraints
Sector Promotion			
			<ul style="list-style-type: none"> ▪ Increased support to designers to maximise results from participation in existing roster of promotional events: <ul style="list-style-type: none"> • Assistance with marketing and sales collateral • Sales workshops • Contract “cluster” sales representative
THE CLIENT PERSPECTIVE			

FASHION JEWELLERY & ACCESSORIES			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
Client Focus			
			<ul style="list-style-type: none"> Develop a client classification system to group clients in the sector and design and deliver programmes geared to each category.
Business & Export Competency			
			(as outlined in the development perspective)
Trade Information			
			<ul style="list-style-type: none"> Subscribe to industry information resources in order to develop targeted information for dissemination to the sector.
Quality Management			
			(as outlined in the development perspective)
Trade Promotion			
			<ul style="list-style-type: none"> Provide support to strengthen existing promotional channels, such as Caribbean Fashion Week, Style Week and monthly cluster shows in order to improve trade outcomes using current channels. Develop and execute a buyer programme including business matching to be integrated within CFW. Promote CFW to foster its reputation and positioning as the premium fashion event for the region.
Other Trade Support Services			
			<ul style="list-style-type: none"> Facilitate innovation exercises and information to drive further innovation by the firms. Provide support to cluster development and strengthening
THE INSTITUTIONAL PERSPECTIVE			
	Institutions reporting increased ability to service the industry	2	<ul style="list-style-type: none"> Assessment of workplans and service delivery methodology to identify areas for improvement Advocate for resource (re-)allocation or non-traditional funding to upgrade service institutions (and in particular the JBDC) BSJ to implement service of monitoring industry controls.
			<ul style="list-style-type: none"> Engage all institutions within the sector to align programmes that are delivered
			<ul style="list-style-type: none"> Seek resources for the sustainability of the Cluster

ICT

Information Communications Technology (ICT)

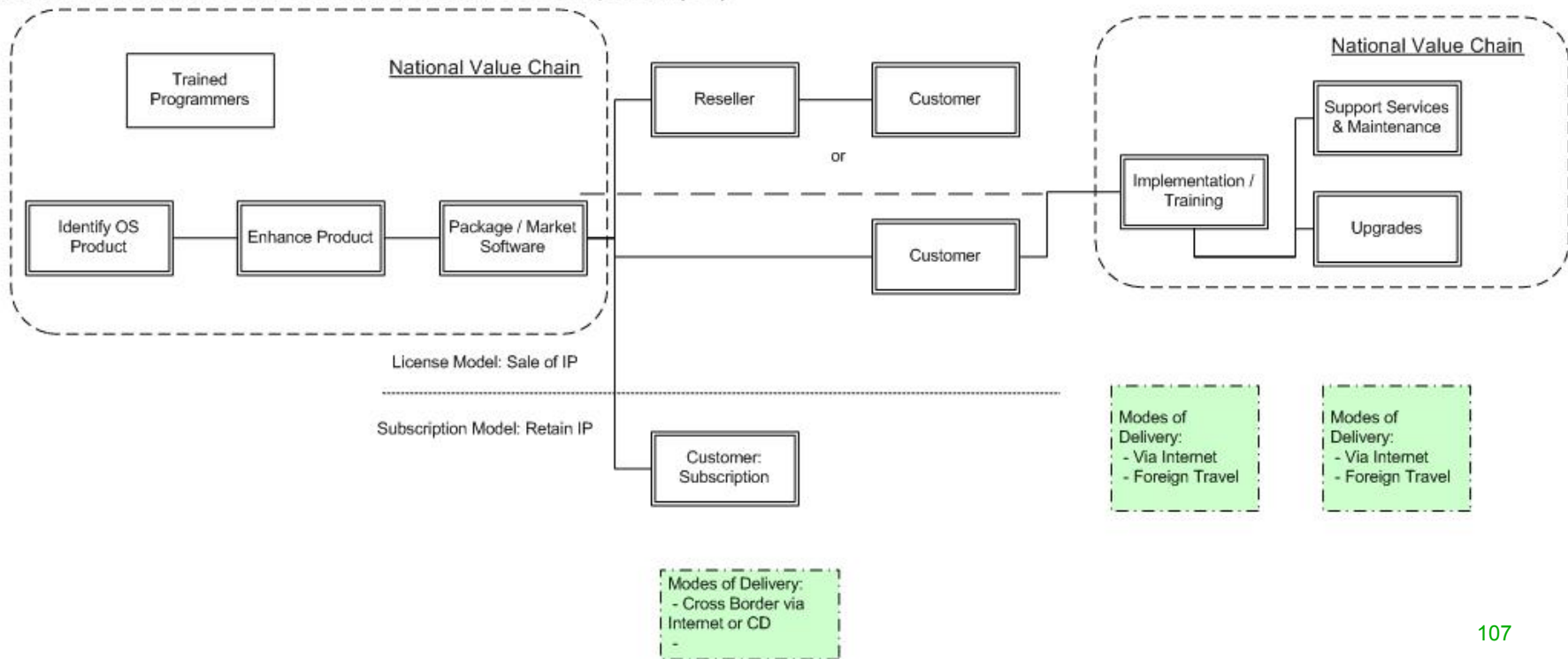
Jamaica has already emerged as a recognised leader in ICT services in the region as well as in target markets, supported by a solid and improving infrastructure, and has the opportunity to build upon this position to tap into the large US market. Jamaica has an active ICT sector centred around software development services and the largest call centre industry in the region. Exporting is already taking place across the segments of this market, with exports from the call centre industry alone conservatively estimated to be between US\$300-400 million.

The ICT sector continues to experience growth with respect to investment within the various industries, including Information Technology, business processing outsourcing (BPO) and telecommunications. One indicator of the performance of the sector in recent years comes from the data for investment and earnings in the sector. Foreign direct investment inflows to the ICT sector has averaged US\$69 million per annum over the period 2001-2005, representing 11% of total foreign direct investment inflows over the period. It is estimated by Jamaica Trade and Invest (JTI) that the ICT projects facilitated by JTI in the telecommunications and call centre industries employ over 14,000 persons.

Goals & Objectives

- Double annual contact centre / BPO exports by US\$150 million. Assuming 75% of the revenue is added value, the total addition to GDP from this sector would be around US\$110 million.
- Establish a venture capital fund to support the ICT industry. Government contribution to the venture capital fund should reach US\$1 million annually; private contributions should reach US\$10 million annually. 30% of the fund's resources should be set aside for ICT start-ups (including call centres), 50% for development of proprietary software and 20% for export marketing.
- Attract 15 foreign contact centre / BPO service providers to the country. FDI in this segment has enabled rapid growth and has raised Jamaica's profile as a regional industry leader. These benefits, along with the jobs created and transfer of expertise that have resulted, should continue to be pursued by courting investment.
- Facilitate the set-up of at least 5 local BPO service providers. While foreign investment does have a number of benefits and even though their exports do count in the output calculation of GDP, much of the profits generated do not remain in the local economy. Given the labour expertise that now exists in the country, local firms should be encouraged to set up shop.
- An industry association to be established (within the first 2 years of implementation of this strategy). At the end of the period, the association should represent 60% of the ICT firms in the country. In addition to taking on the roles outlined above, it should lead on implementation of the Strategic Plan.

Current Value Chain / Business Model: **Software Development (OS)**



SWOT Analysis

<p><u>Strengths</u></p> <ul style="list-style-type: none"> ▪ Country reputation for creativity that may be stretched to the sector. ▪ Thoroughness – more complex systems developed ▪ Creativity: <ul style="list-style-type: none"> ○ Design talent – software (NCU Microsoft winners – story) ○ Programmers ▪ English as a first language ▪ Time zone – same as main (buyer) markets (N. America) while complementing the partner (supplier) markets (Asia & Europe) 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> ▪ Poor perception of Jamaica as a destination of quality products (loss of business as a result) ▪ Work ethic and attitude / discipline (generally, but is absent when the individual or team is challenged) ▪ Education system <ul style="list-style-type: none"> ○ Producing insufficient programmers ○ (group work in tertiary institution, work discipline, problem solving, curriculum gaps – though more responsive); some tertiary graduate are not job-ready
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> ▪ Proximity to the USA for both English and Spanish projects ▪ EPA partnerships 	<p><u>Threats</u></p> <ul style="list-style-type: none"> ▪ Loss of skilled persons to overseas job market ▪ Lack of affordable office space in key locations.

VISION

The Jamaican ICT sector is globally competitive, widely accessible and making the greatest possible contribution to Jamaica's social and economic development

DEVELOPMENT Perspective

The Jamaican ICT sector is one of the most significant contributors to new job creation and improved living standards through better paying jobs based on higher value-added services

COMPETITIVENESS PERSPECTIVE	<p>Supply-Side (BORDER IN)</p> <p>Well-trained work-force available.</p> <p>Institutional training and industry requirements matched.</p> <p>Resources for protection of Intellectual Property in domestic and international markets available.</p>	<p>Transactions/ Cost of Business (BORDER)</p> <p>Office space in close proximity to human capital available.</p> <p>Government incentives available to the sector.</p>	<p>Demand-Side (BORDER OUT)</p> <p>Firms' compliance with market regulations increased.</p> <p>Sector promotion increased</p>
	<p>TRADE INFORMATION</p> <p>Market Intelligence on IT trends provided.</p>	<p>QUALITY MAN- AGEMENT</p> <p>Advisory and financial support provided for certification of firms and for testing and certification of products.</p>	<p>FINANCE</p> <p>Angel and venture funding established and accessible</p> <p>Valuation model for IP as collateral established.</p>

Institutional Perspective

The Jamaica Coalition of Services Industries is established as the focal point for coordinating support to the sector including facilitation of an active Software Developers Association.

ICT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE DEVELOPMENT PERSPECTIVE			
Increase exports from the sector	Annual contact centre / BPO exports	US\$150 million	<ul style="list-style-type: none"> ▪ Attract 15 foreign contact centre / BPO service providers to the country ▪ Facilitate the establishment of at least 5 local BPO service providers ▪ Package and promote investment opportunity for office space for the sector
<i>Increase the size of the sector by building the domestic base of participants.</i>	Annual output from the sector (covering all sub-sectors identified in the scope)	TBD	<ul style="list-style-type: none"> ▪ Seek to be engaged in the (re)development of an education policy (to address literacy and mathematical skills) ▪ Become involved in the CXC curriculum development ▪ Establish an advisory body (core group of consultative experts) for the curriculum and programme design of tertiary institutions. ▪ Train more software developers to meet the skills needs for the projected growth of the sector. ▪ Skills upgrade through training for current BPO employees ▪ Provide opportunities to foster innovation and develop skills: <ul style="list-style-type: none"> • Develop a plan to use software incubators to develop systems for the Government of Jamaica, based on identified needs, thus providing experience to strengthen the sector. • Facilitate linkages between the ICT sector and other sector enterprises for increased delivery of innovative business solutions. ▪ Target and engage more advanced sectors and firms from more advanced countries to partner with Jamaican enterprises. ▪ Foster and provide resources for research and development
THE COMPETITIVENESS PERSPECTIVE			
BORDER –IN: (Value Chain Development)			
<i>The ICT sector has access to funding for start up and expansion</i>	Funds available through VC and Angel financing	USD10 million	<ul style="list-style-type: none"> ▪ Development of the feasibility and action plan for the Venture & Angel Capital fund and establishment of the Fund. ▪ Seek international and domestic funding for the development and entrepreneurial funds for the sector.
	Funds available through VC and Angel financing	USD10 million	<ul style="list-style-type: none"> ▪ Establish a venture capital fund to support the ICT industry
	# of firms listed on the Junior exchange	3	<ul style="list-style-type: none"> ▪ investigate the possible inclusion of the sector in the Junior Stock Exchange
	Framework in place for IP to be accepted as collateral		<ul style="list-style-type: none"> ▪ Develop a standard for IP (to include patents and copyrights) as collateral and engage financial institutions in accepting these.

ICT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
	# of financial institutions that accept IP as collateral	2	
			<ul style="list-style-type: none"> Source adequate interest free or low interest funding for projects in the sector. Seek to introduce Government Procurement guidelines to facilitate acquisition of local software
BORDER			
Cost of Doing Business			
	Increase in the number of firms accessing incentives	5 news firms	<ul style="list-style-type: none"> Review of incentives that exist, and are proposed to determine suitability of these and any gaps that may need to be filled.
Infrastructure			
To provide adequate space for the growth and development of the industry	Increase in office space available	TBD (sq.ft.)	<ul style="list-style-type: none"> Investigate the inclusion of the respective sector in the proposed technology park(s) in Jamaica, and engage the owners. Become engaged in current national initiatives to develop a Technology Park and provide feedback and support for Business Model / Plan / proposal Review zoning laws, and assess the adequacy of infrastructure in commercial (and ICT) zones to plan and locate any infrastructure not deemed to be sufficient, such as electricity and telecommunications capabilities.
<i>(see development objective)</i>			<ul style="list-style-type: none"> <i>Office Space: Investment project proposal for PPP for the investment in the office space</i>
BORDER-OUT			
Sector Promotion			
	# of promotion		<ul style="list-style-type: none"> Provide export marketing support – targeted missions, shows, etc. to be added to JTI/JEA models Diversified marketing approach to identify opportunities in Caribbean/ Latin America
THE CLIENT PERSPECTIVE			
Business & Export Competency			
			<ul style="list-style-type: none"> Provide business development services for software developers to improve the business competency to include an entrepreneurial programme for their start-up or strengthen back-office services for the sector. Facilitate knowledge exchange and transfer within the industry between (i) more experienced participants and new entrants and (ii) foreign and local participants in the sector.
Finance			
			(IP as collateral issue, VC and business competency initiatives)

ICT			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
Quality Management			
			<ul style="list-style-type: none"> ▪ Identify the relevant international standards for the industry and develop programmes to foster implementation of these standards and certification of firms and individuals.
Trade Promotion			
			See sector promotion
Other Trade Support Services			<ul style="list-style-type: none"> • Offer technical [and financial] assistance for new entrants aimed at tapping existing talent that need resources
THE INSTITUTIONAL PERSPECTIVE			
	# of institutions increasing capabilities	2	<ul style="list-style-type: none"> ▪ Training & Education Institutions increasing capability to train designers, developers, programmers and analysts
	Association created # of members	15	<ul style="list-style-type: none"> ▪ Provide support to establish and build capacity for the proposed sector-wide industry organisation ▪ Provide support to the JCS for their transformation
			<ul style="list-style-type: none"> ▪ Perform Benchmark or JCS/JTI survey as an extension of the Services Sector Study: <ul style="list-style-type: none"> • Software development • ICT services

Mining

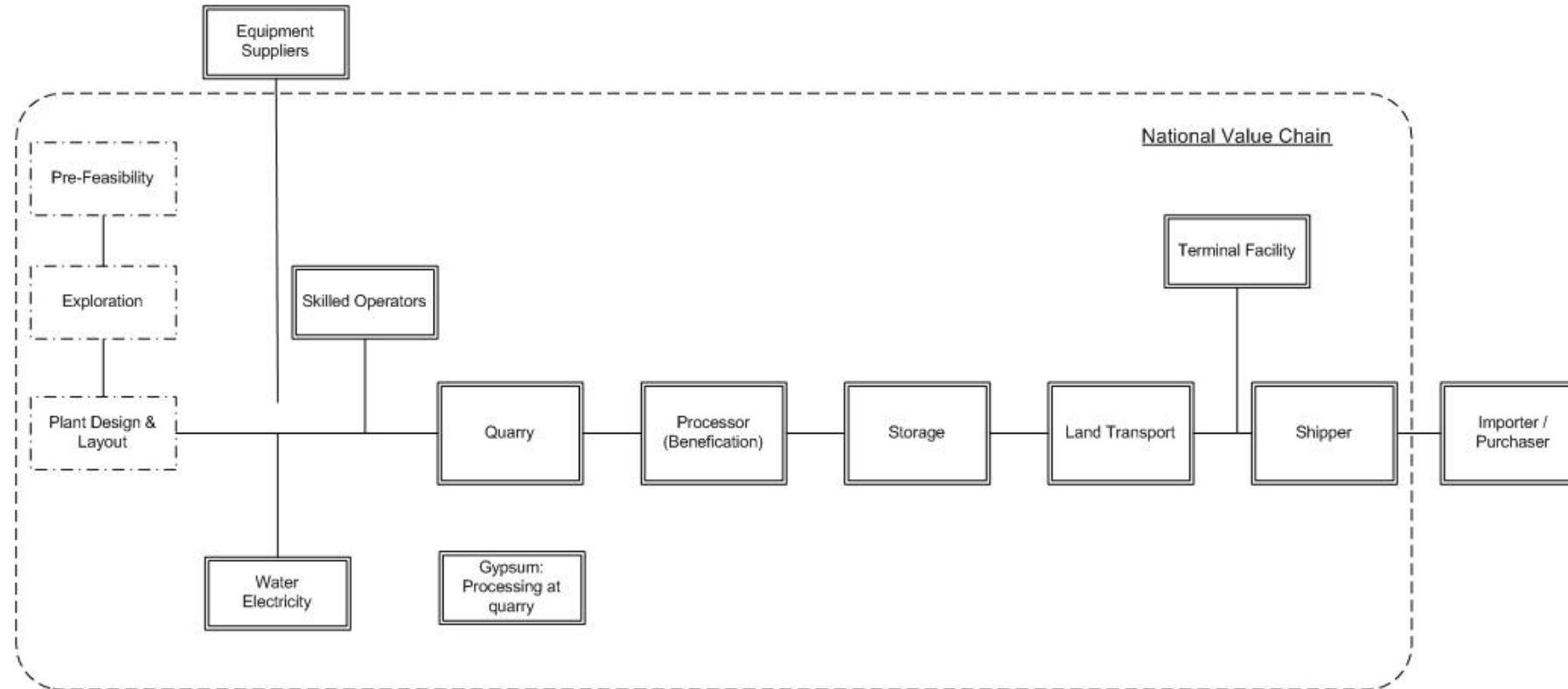
Jamaica has a range of commercially exploitable minerals, including a wide variety of limestones, hard volcanic rocks, bauxite, marble, base and precious metals, sand and gravel. These minerals are of major significance to Jamaica's economic development, particularly their contribution to the national economy, their impact on, and linkages with other sectors, and their overall contribution to GDP. In fact, since 1985 the Minerals Industry has contributed at least 5.2% to Jamaica's annual GDP.

During the period 2001-2006 Mining and Quarrying represented on average 5.6% of Jamaica's Gross Domestic Product (GDP). The most important metallic mineral for the Jamaican mining and quarrying sector is bauxite, the ore from which alumina and aluminium are derived.

The relative contribution of the mining and quarrying sector to the Jamaican economy has shown a long-term decline over the period since Independence, falling from 10.3% of Gross Domestic Product (GDP) in 1962 to 5.9% of GDP in 1982 and to 5.1% in 2001. However the sector has shown growth in recent years, rising to 5.4% of GDP in 2006.

The sector also has the highest labour productivity in the Jamaican economy, due to its capital intensity and efficiency, advanced technology and the high quality of its human capital. It also has linkages with several sectors including transport, urban and regional planning, agriculture, tourism, environmental management and housing.

Current Value Chain: Mining/Minerals



Regulatory Environment

- Quarry Control Act
- NEPA - permit
- Water Resources Authority
- MGD licence
- Rural Planning Division
- Ministry of Health

SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> ▪ Significant quantities and excellent grade of mineral resources, namely bauxite, limestone and hard volcanic rocks. ▪ Strategic location to major international markets. ▪ Ongoing investment in the industry. This is especially the case in the Bauxite/Alumina sub-sector and the Industrial Minerals Sector. ▪ Growing businesses - Some companies have amassed a favourable amount of experience and financial resources which are being reinvested to facilitate further growth. 	<p>Weaknesses</p> <p><i>General</i></p> <ul style="list-style-type: none"> ▪ High level of dependence on the Bauxite Alumina Sector. ▪ Over-reliance on foreign direct investment capital. ▪ Slow pace of modernising aging infrastructure. ▪ Absence of detailed non-bauxite/alumina data. ▪ Tardiness at rehabilitation of mined lands. ▪ Proliferation of illegal quarrying activities. ▪ <p><i>The Industrial Minerals Sector</i></p> <ul style="list-style-type: none"> ▪ Under-capitalization of operations. ▪ Limited access to bulk loading port facilities. ▪ Large number of land-locked quarries, which contributes to high inland freight cost and the transportation of material over long distances on public roads. ▪ Proliferation of small, globally unproductive and uncompetitive quarries. ▪ Poor public image. ▪ Low levels of formally trained personnel. ▪ The quarry zoning process is not streamlined.
<p>Opportunities</p> <ul style="list-style-type: none"> ▪ Significant export potential, especially in the United States, segments of South America and other segments of the Caribbean. ▪ The southern United States has an annual deficit of approximately 40 million tonnes of crushed rock for use in the construction sector. ▪ Large volumes of value-added mineral products, including lime, marble and marble products (bath tubs, face basins, counter-tops, tiles, etc.), skid resistant aggregates, construction and decorative blocks, and boulders for coastal defence. ▪ A growing and increasingly sophisticated local construction sector, which uses an array of mineral products that can be locally produced at very competitive prices. ▪ Planned pet-coke and coal-fired power plants within the Americas present opportunities for the exportation of limestone for desulphurisation purposes. ▪ Increased quantities of limestone for soil stabilisation, pollution control and the production of more environmentally friendly products. ▪ <i>Expansion and diversification of the minerals industry. This involves an overall increase in the size of the industry, and diversifying into sectors such as the Metallic Minerals Sector and the Industrial Minerals sector. Currently, the former plays no role, while the latter plays only a marginal role in the industry.</i> 	<p>Threats</p> <ul style="list-style-type: none"> ▪ Increased imports that can be locally produced based on liberalised sector. ▪ Low levels of research and product development to spark diversification and value addition. ▪ Absence of institutions training mining/minerals professionals. ▪ Difficulties in locally-owned entities accessing capital funding on terms which would stimulate their development. ▪ The development of disruptive technologies and manufacturing of substitutes in competing markets. ▪ The restricted ownership structure of particularly the Bauxite and Alumina Sector, and the frequency with which the ownership of major entities within the sector has changed particularly since the late 1990s. ▪ <i>The possible economic impacts of mergers and take-overs by major multi-national minerals-related companies. Particular concerns relate to the ownership, management practices and business ethos of companies in the local minerals industry.</i> ▪ <i>More facilitatory government policies and a more engaging private sector in competing mineral producing countries such as the Dominican Republic, The Bahamas and Mexico, threaten growth potentials in Jamaica.</i> ▪ <i>Failure to present a consistent and organised public relation campaign promoting the industry.</i>

Minerals Strategy Map

VISION

Jamaica is a world leader in the Minerals Sector, efficiently leveraging all endowments based on value-added products, responsible environmental stewardship, enlightened community engagement and commitment to health and safety

DEVELOPMENT Perspective

The Jamaican Minerals Sector optimises its contribution to increased export earnings, job creation and community development through modernisation and improved efficiencies.

**COMPETITIVENESS
PERSECTIVE**

**Supply-Side
(BORDER IN)**

Specialised tertiary and technical training introduced and/or increased

Research provided to facilitate increased value addition.

Firms modernised to achieve improved efficiencies.

**Transactions /
Cost of Business
(BORDER)**

Investment and access to capital provided to enable implementation of R&D findings.

Number of strategically located specialised ports increased.

**Demand-Side
(BORDER OUT)**

Market opportunities are packaged and disseminated to firms.

Export sales generated by local operations (independent of overseas operations) is increased.

**CLIENT
PERSECTIVE**

**TRADE
INFORMATION**

Market intelligence on prospective market and buyers provided.

**QUALITY MAN-
AGEMENT**

Firms in the sector obtain international quality certification.

Local testing facilities upgraded to provide specifications tests for export products.

**BUSINESS,
TECHNICAL &
EXPORT COM-
PETENCY**

Management skills are developed and improved through introduction of benchmarks.

Export market knowledge and export management skills developed.

FINANCE

Affordable and accessible finance made available.

Institutional Perspective

The Mines & Geology Division is strengthened to deliver optimal support to sector development, and coordination of services provided by relevant technical entities.

MINING			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
THE DEVELOPMENT PERSPECTIVE			
Environmental			
<i>The Mining sector is coordinated and minimises negative impact on the natural environment</i>	% of firms with full compliance to lease agreements and regulations	100	<ul style="list-style-type: none"> ▪ Conduct rationalisation of current lease agreements beginning with the assessment of existing leases, and including the review for compliance to legal agreements.
THE COMPETITIVENESS PERSPECTIVE			
BORDER –IN: (Value Chain Development)			
<i>To facilitate product diversification, increased levels of import substitution, improved product quality, optimised utilisation of mineral resources, and expansion of the industry.</i>	Increase range of products % of products that are value-added value of exports ratio of export sales to production	<i>Baseline to be provided</i>	<ul style="list-style-type: none"> ▪ Design and implementation of a modernisation programme for the industry - acquisition of new equipment. ▪ <i>Provide technical support to access MOI, or write loan proposals to access funds.</i> ▪ Training in quality management systems for all staff (quarry and processing) ▪ Train personnel on technical know how, financial and business management (to overcome gaps based on family intro to business rather than formal training) ▪ Implement specialised professional courses (mgmt and supervisory mgmt levels) geared at industry because difficult to recruit good persons. ▪ Provide assistance to get ISO certification funding - trying to get funds for the industry for this.
BORDER			
Infrastructure			
<i>To increase exports</i>	Access to current export points maintained and expanded	New countries New products Types of products Value & volume of exports	<ul style="list-style-type: none"> ▪ To develop a shared port policy to ensure access to key strategic ports for exports ▪ Joint venture with major international partner for value –added production. ▪ Expand the time window provided by the PAJ for export from 6 months to at least 2 years.
BORDER-OUT			
Sector Promotion			
<i>(export objective)</i>	<i>Export targets</i>		<ul style="list-style-type: none"> ▪ Conduct an opportunity awareness and matching initiative - not all firms know where the opportunities are and how to access them - based on possible applications of their product.
THE CLIENT PERSPECTIVE			
Business & Export Competency			
<i>To increase</i>	% of industry	80%	<ul style="list-style-type: none"> ▪ Provide export financial management skills

MINING			
OBJECTIVES	MEASURES	TARGETS	INITIATIVES
exports	firms participating (current and potential exporters)	15%)	<ul style="list-style-type: none"> Develop a simple guide for contracting a marketing consultant to enter the export field - export readiness/venture guide for the sector
Quality Management			
	% of industry firms certified	30%	<ul style="list-style-type: none"> Provide cost-effective certification and training programme in ISO 1400

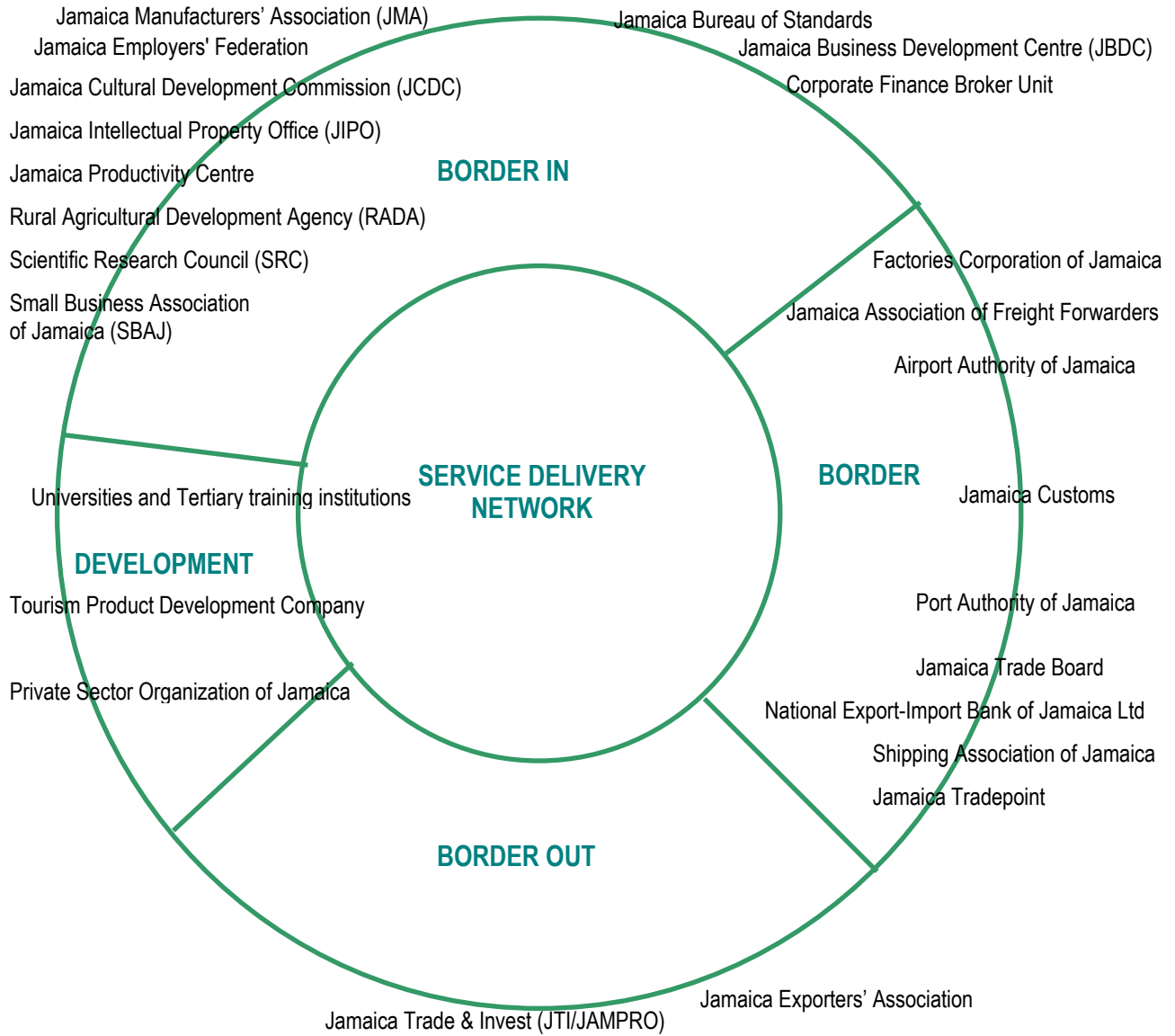
Institutional Support Network

As illustrated in the discussion of stakeholders in the earlier sections of the document, A number of institutions in Jamaica are active in the process of export development, and hence the National Export Strategy. A further distinction is made within the overall Trade Support Network between:

- i. **The Export Strategy Support Network** comprised of institutions which make, direct and/or implement policy initiatives and will perhaps be engaged at a policy level, to weave the eventual strategy into their operations; and
- ii. **The Service Delivery Network**, who are engaged in a ‘hand-on’ manner as service-providers to the community of exporters and potential exporters.

While there are a wide range of public and private institutions in the trade support network, they have not followed a shared vision and planned and holistic approach to export development. A key challenge to be overcome in the implementation of the National Export Strategy (NES) is this general prevailing mindset and limited collaboration. The NES, through its collaborative process approach, has provided a forum for sharing of a strategic vision leading to change implementation. In this regard, the National Export Strategy and the monitoring and implementation arm of the National Export Council offer new possibilities. The following diagrams show the different institutions belonging to the Export Strategy Support Network (40 institutions) and the Service Delivery Network (30 institutions). The proposed members of the National Export Council are members of the network.

Figure 4: Service Delivery Network



Issues

The Quality of Services Offered

- A lack of Institutional Capacity to implement existing mandates in some cases, as well as deficiencies in skills and levels of expertise, presents an obstacle to effective service delivery.
- The level of communication among agencies is too paper –based. There is a need for increased electronic mechanisms to support a seamless business process in the handling of export transactions, including permits and licenses. This will very likely reduce transaction costs, processing time, bureaucracy and corrupt practices.
- Productivity and efficiency of resources, particularly in relation to cost and response time results in sub-optimal use of resources.
- *Measurement of levels of satisfaction in customer service in order to identify what enterprises think of institutions as clients utilising services of the agencies is ad-hoc, uneven and inconsistently done.*
- *“More bureaucracy and less efficiency”.*

Coordination and the Extent of Duplication

- Absence of strong leadership (the NEC) and a strategic plan (the proposed National Export Strategy) in order to achieve results-oriented improvements.
- Absence of a coordination process and lack of a focal point limits the ability to coordinate plans, and/or rapid responses to specific challenges as the need arises
- Duplication in services and activities of private sector associations results in over allocation of resources in some areas while gaps remain in others.
- Clients of agencies must typically visit multiple locations, in seeking to transacting business, resulting in confusion and ambiguity, waste of physical energy and national resources in relation to human productivity.
- *Communication between agencies and clients needs to be greatly improved to minimise ambiguity and confusion.*
- *Identification and engagement of the appropriate stakeholders is not always done, and the same individuals and agencies are often represented at the table. There is often apathy on the part of private sector stakeholders to participate fully in planning processes.*
- *Too much turf protection hinders the coordination process*
- *Suspicion and lack of trust results in communication challenges, lack of transparency and preservation of special interest groups.*

Recommendations

Strategy Support Network (Leadership, Synergy, Coordination and Structure) ***To establish the Export Council that is resourced with a supporting secretariat for the effective implementation of the Export Strategy.***

The key points are summarised below.

- Maintain strong leadership for the Export Council at the Cabinet level.
- Formally institutionalise the Trade Support network under the Export Council, including the introduction of requisite legislation, in order to give Export Council a clear mandate, suggest permanence in work programme arrangements and establish influence in relation to both public and private sector stakeholders.
- *Re-examine mandates of institutions with a view to eliminating duplication of efforts*
- Review and benchmark the business processes underlying the interface between institutions and exporters with a view to re-engineering as necessary.
- Improve communication through regular and structured dialogue among Export Council members
- Nurture the creation of formal linkages between Trade Support Network stakeholders
- Diagnose and implement relevant training and capacity development initiatives for institutional stakeholders.

The design of the Monitoring and Evaluation Plan will seek to address some of these issues as well.

Services Delivery Network (Capacity and Institution-Building)

For each sector strategy and client service delivery (cross-sector strategies) the weaknesses to be addressed or strengths to be further developed are identified. Therefore recommended actions are not included here.

THE INSTITUTIONAL PERSPECTIVE			
<p><i>To establish the Jamaica Export Council that is governed by law and resourced and effect its supporting secretariat for the effective implementation of the Export Strategy.</i></p>			<ul style="list-style-type: none"> ▪ Establish strong leadership for the Export Council at the Cabinet level. ▪ Formally institutionalise the Trade Support network under the Export Council, including the introduction of requisite legislation, in order to give Export Council a clear mandate, suggest permanence in work programme arrangements and establish influence in relation to both public and private sector stakeholders. ▪ Provide resources and support for the creation and operation of the NES Secretariat. ▪ <i>Re-examine mandates of institutions with a view to eliminating duplication of efforts</i> ▪ Review and benchmark the business processes underlying the interface between institutions and exporters with a view to re-engineering as necessary ▪ Improve communication through regular and structured dialogue among Export Council members ▪ Nurture the creation of formal linkages between Trade Support Network stakeholders ▪ Diagnose and implement relevant training and capacity development initiatives for institutional stakeholders.
<p>Private sector/cluster associations actively manage their respective strategies</p>	<p># of associations / formal groups established</p> <p># of associations / formal groups established</p>	<p>4</p> <p>7</p>	<ul style="list-style-type: none"> ▪ Establishment and adoption of methodology (operational procedures and policies) related to the mandate for cluster/sector support and facilitation within JTI and JEA ▪ Design and execute Capacity building initiative for JTI and JEA related to the methodology (above) ▪ Inform and train association and groups about establishing and managing private sector (or membership) associations. ▪ Provide facilitation support for the sector/cluster groups

STRATEGY MANAGEMENT

Strategy Management and Monitoring

This Jamaica Export Council is charged with oversight for the implementation and management of Jamaica's National Export Strategy, including its monitoring. This will be done through the Council body, its sub-committees and the supporting secretariat.

Its primary responsibilities are:

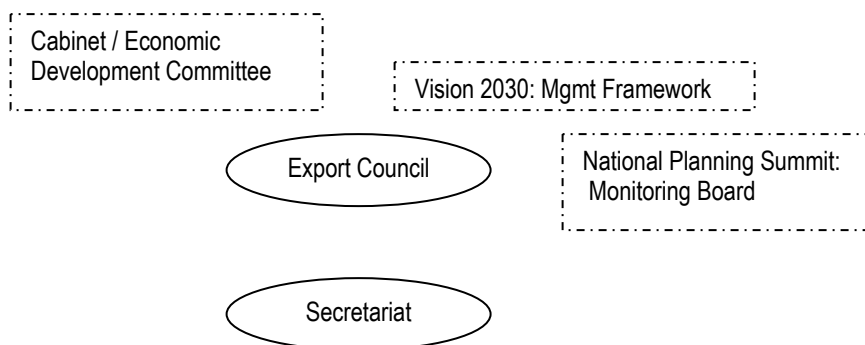
- Ensure that Jamaica has a current and relevant Export Strategy that is under implementation, by leading the process of the annual update of the strategy document.
- Conduct quarterly and annual assessments of the Export Strategy.
- Report (through its members) on the implementation of the initiatives of the Export Strategy.
- Perform advocacy and support functions at varying levels.
- Provide reports to the lead national mechanisms.

The implementation of the Strategy will be managed by a Secretariat which will be the focal point for all related activities being undertaken by the relevant stakeholders.

A formal structure will ensure that the strategy developed is under implementation and its effectiveness periodically assessed.

Structure

The proposed structure, still to be finalised, is illustrated below.



The key points are that the Council is integrated into the national development mechanisms, and that it is supported by a secretariat. The framework is to be formally agreed and institutionalised.

RESOURCE MOBILISATION

Due to the over-arching nature of the Export Strategy, a number of resources will need to be identified to support the implementation which includes but not limited to the following:

- Government of Jamaica Budget (Ministries & Agencies)
- Multi-lateral and Donor Support Network
- Private Sector investment and Contributions

The Approach and Focus

Several initiatives that have been assigned to agencies are within their mandates and may be resourced for implementation using current allocated as well as projected resources. The primary approach through the Export Council will be to align to the initiatives and monitor for the mobilisation of allocated resources to priorities. The approach to resourcing those initiatives for which there is no funding is through a coordinated approach to fund-raising and resource allocation. The National Export Strategy provides a strategic framework for approaching donor agencies for funding. This collaborated effort of strategic programme funding will also be used to target the private sector. The focus will be on linking the resource allocation to initiatives based on alignment (sequencing) and priority for greatest effectiveness and efficiency.

Priorities

A primary purpose of the Validation Workshop was to prioritise initiatives in each of the action plans. Based on the criteria of importance/impact, urgency and ease, the priority initiatives were developed. This will be used to guide resource allocation for implementation. This will also be within the concept of the weighting of perspectives based on the areas on which the greatest level of impact is needed.

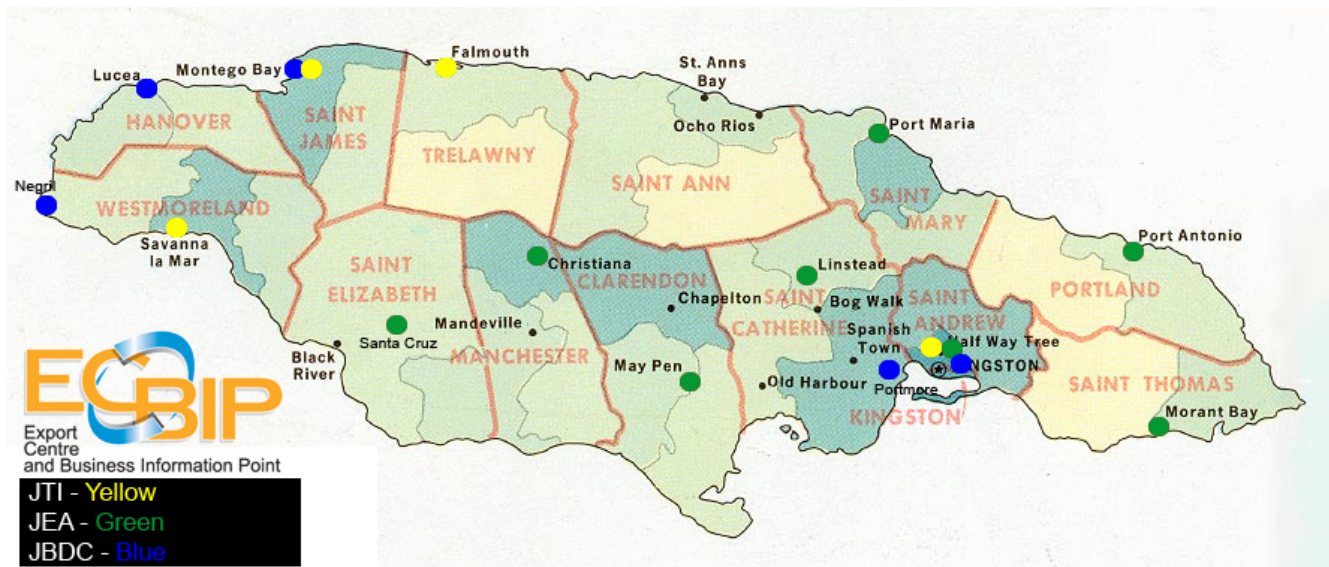
Export Centres and Business Information Points

With the support of the Private Sector Development Programme, a joint initiative of the European Union and the Government of Jamaica, Export Centres and Business Information Points have been established to provide a wide range of value added services to the local business community aimed at increasing performance and profitability.

The Business Information Points are both virtual and physical offices specifically set up island-wide to give micro, small and medium sized enterprises (MSMEs) access to a range of standardized and value-added business information. The Export Centres on the other hand, aim to positively impact national export performance & competitiveness through the provision of a range of export-related advisory services and export development tools.

All Export Centres and Business Information Points offer a basic suite of services that are standard wherever you are in the island. In addition to these services, different locations may offer customized value-added options.

To date, fourteen (14) satellites have been launched island wide of which ten (10) are Export Centres and four (4) are Business Information Points. Services can be accessed at the locations island wide as follows:



Kindly note that these locations are available on the EC/BIP website: <http://www.ecbip.com/contact.php>

Export Centres and Business Information Points

Primary Agencies

Jamaica Trade and Invest (JAMPRO)
 18 Trafalgar Rd.
 Kingston 10
 T: +1(876) 978-7755 ext. 2004
 E: mporter@jti.org.jm

Jamaica Exporters' Association
 1 Winchester Road
 Kingston 10
 T: +1(876) 960-4908
 E: eileenc@exportja.org

Jamaica Business Development Centre
 14 Camp Road
 Kingston 4
 T: +1(876) 928-5161
 E: awest-myers@jbdc.net

Satellites

Rural Agricultural Development Authority (RADA)
 Vanity Fair
 Linstead, St. Catherine
 T /F: +1(876) 903-2916
 C: +1(876) 821-2469
 E: krobinson@exportjamaica.org

Shop 93
Portmore Pines Plaza
 Portmore, St. Catherine
 T: +1(876) 989-9574
 E: pcci@cwjamaica.com

Rural Agricultural Development Authority (RADA)
 Denbigh Show Ground
 May Pen, Clarendon
 C: +1(876) 821-2468
 E: slewis@exportjamaica.org

Christiana Potato Growers Association
 Christiana, Manchester
 T: +1(876) 964-4279 and +1(876) 476-5317
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