



Export. Live. Prosper.

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

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Ministry of Industry,
Investment and Commerce



The National Export Strategy of Jamaica was developed on the basis of the process, methodology and technical assistance of the International Trade Centre (ITC).

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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 industry 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.

MESSAGE



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 Industry 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, synchronised 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 the benefit of doing 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.



Portia Simpson Miller, ON, MP Leader of the Opposition

The promulgation of a National Export Strategy is a critical corollary to Jamaica's sustainable economic development. In keeping with the intent, objectives and nature of the National Industrial Policy, the Tourism Master Plan for Sustainable Development and most recently, the Vision 2030 Document, the National Export Strategy will, in its execution, highlight and emphasise those activities - inclusive of appropriate policies - that are required to promote the export of indigenous value-added commodities to a wider market outside of Jamaica.

Jamaica Trade and Invest (JTI), formerly JAMPRO, presents a natural anchor for this strategy. Leveraging the relationships, connections and networks that JTI has amassed over the years, to position and promote Jamaica's export offerings, is precisely the purpose of the JTI.

In executing the strategy, I am sure the JTI and its many partners and stakeholders are aware of the multi-dimensional approaches that will have to be taken. These include the thorough researching and gathering of market intelligence for the consumer markets for the products we will seek to export. Of necessity will be the alignment of required standards for quality and supply with local benchmarks used to calibrate the production and manufacturing processes.

The National Export Strategy also has to utilise visioning as a key tool in its execution. We must begin to register trends and new trails to blaze, if we want to remain ahead of the curve, and to establish local centres of production excellence to become and remain competitive. In this regard, careful analysis will have to be given to areas of comparative advantage as well as competitive advantage - our cultural and creative assets spring easily to mind. Jamaica's recognition as a brand - with respect to music, sports, cuisine and other saleable lifestyle commodities - must be underpinned by a robust set of policies and programmes that will enhance the national earning potential from these areas where we truly have both comparative and competitive advantages.

Buoyed by these essential objectives, and recognising as we do that the successful implementation of the National Export Strategy is at this point mission critical to our economic and social development, we stand committed, as all Jamaicans at home and abroad should, to ensure that our talent and expertise will be applied in the consultative and partnership processes towards this goal.

STATEMENT



Sancia Bennett Templer

President, Jamaica Trade and Invest

As the world seeks to recover from the current economic crisis developing countries, such as Jamaica, have been forced to take a renewed and strategic look at the way in which we achieve sustainable economic development goals – key of which is a thriving export sector. Jamaica Trade & Invest (JTI/JAMPRO), as the country's export promotion agency, operates on the underlying premise that the development and implementation of a comprehensive and forward-thinking National Export Strategy (NES), designed to boost the country's export potential, is a significant element to the advancement of the economic growth of our country.

The NES provides a practical roadmap of how Jamaica can and must achieve increased levels of economic development by focusing its limited, but extremely valuable, resources on developing export capacity in those sectors and areas in which the country has the greatest competitive advantage. In addition, the NES provides a functional network that will address the cross-sectoral issues that need to be resolved in order to increase our competitiveness in the global arena.

The strategy of public-private sector partnership (PPP), which successfully guided the development of the NES, will continue to be employed in its implementation. The collaborative effort between JTI and the Jamaica Exporters Association (JEA) will be further deepened

and expanded to form the basis on which the Strategy will be communicated and monitored going forward. Additionally, the NES will continue to be aligned in its implementation to the activities of the Vision 2030 National Development Plan, as well as the National Planning Summit (NPS) and the Partnership for Transformation (PFT).

Ultimately, it is our hope that the NES will empower the Jamaican exporter – existing and emerging, traditional & non-traditional, large & small – to better penetrate international markets and take full advantage of the global opportunities. To this end, the Strategy seeks to ensure that our exporters are well-positioned to efficiently respond to trade openings and market penetration initiatives by providing for the dissemination of quality business advice, training for prospective exporters and standardised, universal and value-added services being offered through island wide Export Centres and Business Information Points.

JTI, as it seeks to fulfill its primary functions of export and investment promotion – and in its ongoing participation in the development and implementation of the NES, will continue to work towards establishing “Jamaica as the place of choice to live, work, raise families and do business”.



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 realise 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 industry strategies for more effective, efficient and globally competitive trade. The NES will also enhance the development of Jamaica's export industry and business environment and improve the competitiveness of our firms.

Brand Jamaica is one of the most recognisable brands internationally and it is important that we utilise the National Export Strategy to position Jamaican exporters of goods and services to capitalise 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 Industry as we work together to build a better Jamaica.

STATEMENT



Dr. Pauline Knight

Act'g 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 industries. It will provide industry-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 (ITC)

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 industry 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. International Trade Council (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 and Commerce with the invaluable contribution, dedication and commitment of a wide cross-section of the Jamaican Export Community and the Trade Support Network. These individuals and stakeholder groups, drawn primarily from across the eight focus industries governed by the Strategy, spent long hours in extended consultative and strategy sessions, the results of which constitute the substance of this National Export Strategy.

To them, and the many other individuals, businesses and organizations, the Export Council offer its grateful thanks for the contribution of time, resources and intellect to produce and finalize this definitive National Export Strategy document.

The Strategy owes a lot to the Ministry of Industry, Investment and Commerce, which is championing this initiative at the policy level; as well as to the JEA and its outgoing President Marjorie Kennedy,

whose indomitable spirit in many ways have come to symbolize the character of this Private-Public Sector collaborative to increase Jamaica's exports to the World.

We sincerely thank Mrs. Kennedy for her tireless efforts and inspired leadership and the insightful knowledge and boundless energies of incoming President Michael Lumsden. It goes without saying that the support of the JEA Secretariat led by General Manager, Jean Smith has been nothing short of remarkable.

From start to finish, the approach and methodology employed in the design of the Strategy has been premised around a sincere commitment to build strong consensus and broad stakeholdership. In this regard, the leadership of JTI's President Robert Gregory and Deputy President, Lisa Bell has been exemplary.

We are also grateful for the indefatigable contributions of Andrea Reid, who buttressed the work of the NES Project Team, which met weekly to review the progress of the initiative.

Commendations should also be paid to Arlene Martin and Carole Rowe, two of the consultants on the Strategy Development Project, who facilitated the many consultation and validation sessions, and JTI Corporate Communications which edited the many iterations of the draft technical document.

Jamaica owes much to the GOJ/EU Private Sector Development Programme (PSDP), which provided partial funding for the NES, as well as to the International



Marjorie
Kennedy

ACKNOWLEDGEMENTS

Trade Centre (ITC) in Geneva, which has been central to the development and implementation of the strategy.

The NES has been developed on the process, methodology and technical assistance of the ITC.



Owen Skae, ITC consultant makes a point to NES Project Team.

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 industry entities; some of which are members of the Jamaica Export Council. The Council is an independent body comprising representatives of the public and private industries, charged with the execution of the Strategy while acting in an advisory capacity to the Government and private industry stakeholders.

The Council comprises representatives of the following public and private industry

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 Industry Organisation 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 industry strategies emerged from the work of dedicated teams for each of the priority industries, 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 industry:

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 Industry Organisation 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 industry entities:

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

1. Why a National Export Strategy for Jamaica?

Jamaica's National Export Strategy is based on (i) the current imperative for achieving export-led growth (ii) export performance, (iii) global competitiveness and (iv) the current international context that combines the current global economic situation as well as the trade environment.

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. As such, it is one of the pillars of the National Development Plan, Vision 2030.

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 industry by:
 - Attaining higher value addition in all priority industries;
 - 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;
 - 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 industry.

The Government and the productive sector have long pinpointed a range of industry-specific weaknesses and a number of cross-cutting issues which have impeded the global competitiveness of the industry, and the achievement of export-led growth. These form the basis of the strategy and are identified later.

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 industry, 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, fostering increased and improved exports.

While the strategy seeks to contribute to export-led growth, in the context of the current macro-economic situation, the Strategy is expected in the first few years to contribute to economic recovery and to stem the likely impact of the economic downturn. The design and implementation of the Export Strategy is therefore timely as it may assist in minimising the projected economic fallout in Jamaica due to the current global crisis.

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 industry 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 Industry,
- 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, characterised 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 industries 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

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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 and Financial Indicators for Jamaica, 2004-2008

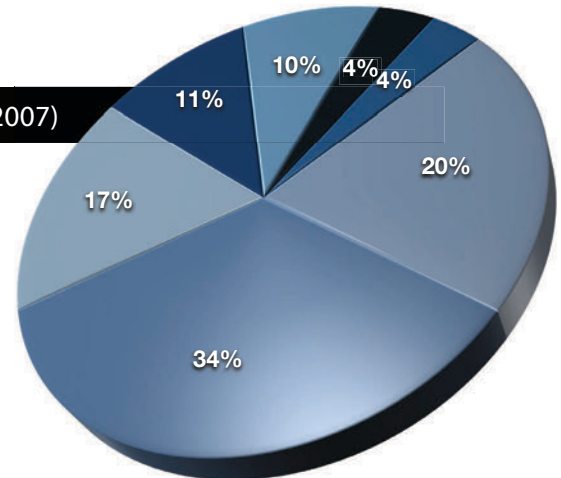
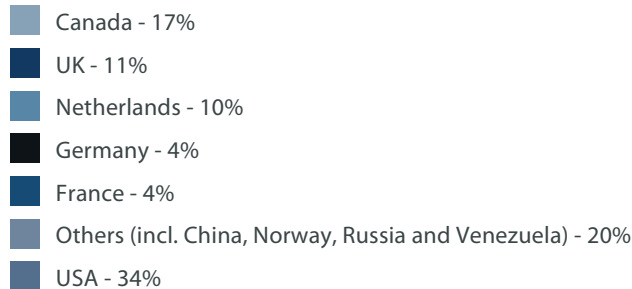
	2004/05	2005/06	2006/07	2007/08	Projections	
					2008/09	2009/10
Nominal Gross Domestic Product (GDP) (in billions of national currency)	550	643	707	801	964	1087
Total GDP (in millions of U.S. dollars)	8,957	10,200	10,700	11,500	13,020	13,812
Nominal GDP growth ¹	10.9	17.0	10.0	13.3	20.3	12.7
CPI inflation / (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** 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\$mn) 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; * Annual percent change; / Consumer price index (in percent); # Versus the U.S. Dollar; ** Emerging-Market Bond Index (basis points above the US Treasury bonds); // Percent of GDP; ~ Includes domestic and external liabilities; ** Defined as public industry 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.

Area: 11,425 km; Population: 2.7mn (2007); Population density: 238.2 people/km; GDP per capita: US\$4,140 (2007); Currency: Jamaican dollar (2008 average US\$1=J\$72.67).

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



Sources: IMF, Director of Trade Statistics

Improving Export Performance

National Export Performance, 2002-2008, Goods

Despite some modest movement in economic growth between the 6-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	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 industries, 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 beverages.¹ 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).

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

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

Total Exports	2002	2003	2004	2005	2006	2007	2008
	1,117.3	1,195.5	1,404.5	1,531.5	1,983.4	2,254.2	2,641.0
Traditional exports:	868.8	931.1	1,081.9	1,160.0	1,337.7	1,500.4	1,546.3
• Agriculture	55.0	55.9	56.6	25.6	46.4	42.3	31.8
• Mining	711.0	779.5	896.7	1,021.2	113.2	1,306.5	1,364.5
• 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	1,094.7
• 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.

National Export Performance 2002-2007, Services

The relatively 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 years.² Although imports of services have increased as well, the trade balance has been favourable for the country.

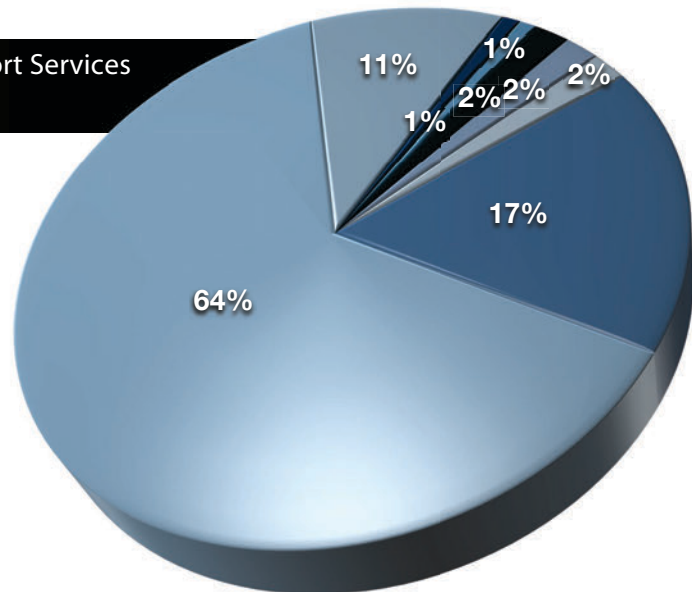
Table 2.3: Jamaica's Trade in Commercial Services, 2003 - 2007 (US\$M)

Service	Flow	2003	2004	2005	2006	2007
Commercial services (Services excluding government services)	Exports	2,103	2,262	2,296	2,613	2,566
	Imports	1,538	1,677	1,676	1,969	2,072
Transportation	Exports	474	497	451	459	447
	Imports	618	648	718	885	961
Travel	Exports	1,355	1,436	1,545	1,870	1,834
	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

² 2008 data was not available.

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

Royalties and Licence Fees	- 0%
Communications	- 11%
Financial	- 1%
Insurance	- 1%
Computer and Information	- 2%
Personal, cultural, and recreational services	- 0%
Other Business Services	- 2%
Government Services	- 2%
Transportation	- 17%
Travel	- 64%
Construction	- 0%



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

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 industry, 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

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).

diversifying exports, as well as reducing the trade deficit. The development and implementation of the export strategy identifies the priority industries best suited to diversify and expand exports, as well as the issues to be addressed in the business and trade environment to facilitate the 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 USD64 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 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 experienced strong export performance under negotiated trade agreements.

CARIBCAN: Over the period 1992 to 2002, trade between Canada and CARIBCAN beneficiaries has grown significantly, from CAN329 million to CAN716 million, an increase of over 200%.

CBI: Jamaica's imports under CBI increased significantly, by approximately 62%, to USD246 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 industry 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 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).

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)

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). While there has been deterioration in the macro-economic stability sub-index, there have been improvements in the Business Competitiveness Index ranking.

Competitiveness Performance: Industry Analysis⁴

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

The Champions category classifies national exports that experience growth in industries 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 losers in growth sectors (Underachievers).

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 industry. Other traditional exports amongst the top ten national exports (namely banana and coffee) were from the agricultural industry 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 industries including agriculture/food, crude materials, apparel and beverages.⁵ The Achievers in Adversity consisted of both traditional and non-traditional export products and industries.

The performance of product groups was taken into account for the industry selection exercise to choose industries of focus for the first phase of the NES.

⁴ 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.

⁵ ESSJ 2006 6.4

National SWOT Analysis

STRENGTHS

Supply Side Issues (Border-In)

- Sophisticated infrastructure, especially telecommunications and transportation.
- A range of institutions and programmes supporting private industry 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.

Business Environment (Border)

- Upgraded infrastructure (ports, roads, telecommunications).

- Competitive REER.
- Well-developed legal & regulatory framework and incentive regime.

Demand Side Issues (Border-Out)

- Recognised country/product brand, in particular for niche products, such as coffee.
- Proximity to the US and other key export markets.
- Favourable trade agreements.

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.

WEAKNESSES

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 privatised industries, such as Telecommunications).
- Service deficiencies to the industries and clients; Many private industry associations and industry specific associations are weak and in need of institutional strengthening and funding.

Business Environment (Border)

- Lack of enabling macro-economic environment.
- High transaction cost of doing business.
- Low access to capital, including venture capital, and high cost of capital.
- Restrictive labour laws.

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).

National SWOT Analysis (continued)

- Poor urban/rural and regional planning.

WEAKNESSES (continued)

- Limited stretch of (positive) brand reputation across all export goods and services.

Issues of Development

- High crime rate increasing cost of doing business.

OPPORTUNITIES

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.

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.

THREATS

Supply Side Issues (Border-In)

- Work-force attitude/culture.

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.

Issues of Development

- Dependence on non-renewable, traditional energy sources, especially in the 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 and the high levels of responsiveness that the imperatives and challenges of globalisation demand. 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, emphasise quality and ultimately, realise 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;
- Over dependence on preferential market access (under the ACP/EU, CBTPA, CARIBCAN agreements) that has lead 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 industries 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 industries 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.

STRATEGY AT A GLANCE

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.

Competitiveness Perspective

SUPPLY SIDE (BORDER-IN)

A competitive workforce prepared through an integrated approach to education and training.

Productivity and efficiency indicators improved.

More R&D and technology innovations applied in firms.

TRANSACTION COST OF BUSINESS (BORDER)

Increased strategic alliances between exporters and facilitators in the movement of goods and services.

Road and rail infrastructure improved.

Energy sources diversified.

Reduced business risk through effective crime management.

A more business-oriented trade facilitation environment.

DEMAND SIDE (BORDER-OUT)

Increased penetration of existing markets and entry into new markets.

Increased understanding of market access opportunities provided for under negotiated trade agreements.

Increased participation of the private sector in trade policy formulation.

Trade and marketing support in export markets improved.

A nation branding framework is in place to manage the country's reputation, brands, goods and services.

Client Perspective

TRADE INFORMATION

Increased provision of data-driven trade information:

- Country/market reports.
- Product reports.
- Export opportunities.

STANDARDS AND QUALITY MANAGEMENT

Capacity-building of exporters enhanced:

- Global standards and certification.
- Quality production and assurance systems.
- Compliance with international standard requirements.

BUSINESS DEVELOPMENT AND EXPORT READINESS

In-depth training in key areas such as export plan development, marketing, financial management, pricing, ICT and E-readiness.

FINANCE

Affordable and accessible financing made available.

PACKAGING

Affordable quality export packaging made available locally.

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.

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, protecting local industries and promotion. 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 (ITC) in Geneva, Switzerland, which has been our sponsor in this initiative. Consider 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



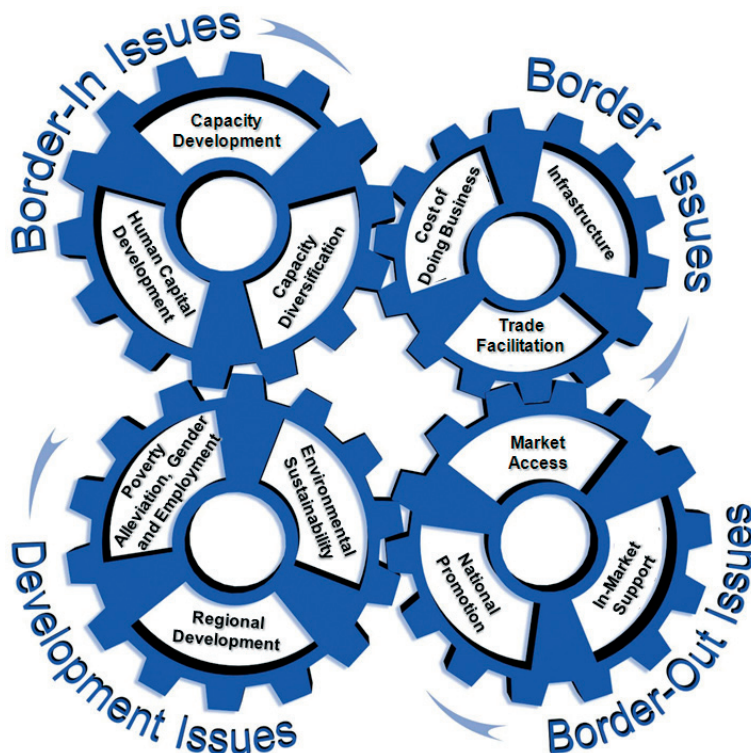
Development issues refer to:

- 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 Industries⁶ of the National Export Strategy

The National Export Strategy may be described as targeted or focused. The client perspective of strategy design encourages the focus on specific industries, rather than trying to address the entire export sector. These are the priority industries included in the first phase of the National Export Strategy:

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-cutting industry issues addressed by the National Export Strategy:

- Human Capital Development
- Innovation & Technology (Capacity Diversification)
- Cost of Business
 - i. Energy
 - ii. Security
- Trade Facilitation
- Transportation (Infrastructure)
- Market Access
- Business & Export Competency
- Finance

- Quality Management
- Packaging
- Trade Information
- Trade Promotion and In-Market Support
- Nation Branding

Industry Prioritisation

Jamaica is fortunate in that there are potentially 40 sub-industries that could become world-class exports, however in formulating a National Export Strategy due recognition was given to the resource requirements necessary to implement it. At the start of the strategy design process in April 2008, prioritisation was required based on justifiable criteria.⁷

These are the priority industries identified at the start of the National Export Strategy design process:

1. Accounting and Auditing
2. Agro-processing (Food)
3. Aquaculture
4. Beverages
5. Education
6. Entertainment
7. Finance and Accounting
8. Furniture and Building Products
9. Fresh Produce
10. Health & Wellness
11. Information Communication Technology (ICT)
12. Fashion
13. Minerals and Mining

⁶ The Statistical Institute of Jamaica (STATIN) completed a comprehensive revision of Jamaica's System of National Accounts in October 2008. The nation's accounts were previously based on the United Nations 1968 System of National Accounts (1968 SNA). The process revision resulted in changes in: concepts and definition and terminologies to name but a few. One such change in terminology was from Industry to INDUSTRY.

⁷ The criteria, which assessed current and potential future state, were

- Contribution to GDP
- Export performance
- Alignment to Vision 2030 development objectives
- Employment (considering quantity, quality and the location of jobs created or enhanced)
- Linkages
- Export Growth/Market Potential of the Industry (based on international demand as well as market feasibility and potential)
- Potential Ability to Compete (product differentiation, price, value, reliability of supply, etc.)
- Key Constraints inhibiting export success
- Possible Scale of Resources Required within the industry (in particular as it relates to increasing the industry's export performance)

Having engaged several stakeholder groups, the following industry prioritisation grid was developed:-

Industries	Development Impact (GDP Contribution, Employment)	Value Addition, Export Performance & Potential	Contribution to Overall Export Competitiveness
Accounting and Auditing	M	H	H
Fresh Produce (Agriculture)	H	H	H
Agro-processing	H	H	H
Aquaculture	M	H	M
Coffee	M	H	H
Education	M	M	H
Entertainment (incl. Dance, Drama, Film, Music)	H	H	H
Fashion, Jewellery and Accessories	M	H	M
Finance & Insurance	H	M	H
Furniture and Building Materials (Manufacturing)	H	M	H
Information Communications Technology (ICT)	H	H	H
Mining	M	M	H

Key: H- High, M- Medium, L - Low⁸

The stakeholder groups working with this paradigm of a 'combined competitiveness-development' focus, set about the challenging task of developing strategies and action plans around thirteen specific priority export industries, that would form the bedrock of the overall national strategy. During the process there were several challenges in engaging some groups. As a result, eight of

the thirteen groups developed comprehensive strategies. Within a year, these groups met to validate the Strategy, the final hurdle before systematic execution according to strategy.

Additional changes to the preliminary industry listing were (i) the separation of coffee from beverages based on unique challenges, (ii) the removal of fresh produce as this industry was being addressed under the more comprehensive All ACP Commodities Programme and (iii) the integration of the beverages within agro-processing.

During the annual revisions to the National Export Strategy, there will be efforts to re-engage the strategy groups for industries prioritised in the first round, and identify additional priority industries.

How the Strategy Addresses the Manufacturing, Agriculture and Tourism Industries

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-industries 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 industry were effectively articulated and addressed in the cross-cutting 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 industry 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

⁸ Each Industry was rated based on the actual ranking (from figures provided for each criterion) in relation to other industries and sub-industries.

related project employing a wider approach and involving additional international partners. As it relates to tourism, the Master Plan for the Sustainable Development of Tourism addresses the medium to long term plans for this industry.

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

Key Considerations

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 industry and assessing these against five value options was employed.

For each of the priority industries, detailed industry strategies were designed using value chain analysis, which identified five value options to:

- Acquire value by improving efficiency within the national component of the value chain (and thereby enhancing the industry's competitiveness), such as group sourcing to reduce cost, or eliminating an intermediary;
- Retain 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 industries, like creating film products from the dance and drama industries; and
- Distribute value within the economy by increasing the export industry'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 industries 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: 20%
- The Competitiveness Perspective: 20%
- The Client Perspective: 25%
- The Institutional Perspective: 35%

These form the basis of the Monitoring & Evaluation of the Strategy using the balanced score card methodology. However, 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 (innovation and technology), human capital development, energy, 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	
Strategic Consideration	Priority	Strategic Consideration	Priority
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
		Energy	1
		Security	1
		Market Access	3
		In-market Support	1
		National Promotion	3
Client Perspective		Institutional Perspective	
Strategic Consideration	Priority	Strategic Consideration	Priority
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	2		

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

3. Cross-Cutting Industry 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 industries and the private sector establishes priorities within industries. 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 and cross-cutting industry 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.

Issues

- No policy regarding establishing an education and training system that supplies the skills needed by industries.
- 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 industries or at a national level.
- No policy regarding the 'brain-drain' of qualified human resources.

Support Planned / Ongoing Initiatives

In addition to the strategic initiatives outlined in the action plan, the following supporting national initiatives are recommended:

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

- 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.
- Focus on improvements in basic educational areas, such as mathematics and English.

3 CROSS-CUTTING INDUSTRY STRATEGIES

- Improve foreign language training.

Increased productivity through retention of human resources

Improved productivity in all industries

- Develop a permanent institutional framework for identifying, promoting and reviewing national values and attitudes to instill a productivity culture in Jamaica (from the company to institutional level).

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

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Human Capital Development					
Enhanced human capital development that meets the human resource requirements of the key sectors.	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.	<ul style="list-style-type: none"> • Implement industry/sector-specific training and education programmes in each priority sector: <ul style="list-style-type: none"> o Develop/Enhance curricula for: <ul style="list-style-type: none"> • Coffee: Certified Coffee Extension officers • Music: business management, technical areas (mixing, production) • Film: Trained Executive Producers • Fashion: Enhance and integrate the different curricula now in place • Mining: tertiary • Aquaculture: tertiary • Agro-Processing: tertiary • ICT: <ul style="list-style-type: none"> (a) Secondary (CXC) (b) Tertiary o Facilitate the registration and/or accreditation of each programme by the relevant authority. o Design tracer studies for programme tracking. 	Lead: Ministry of Education Partners: <ul style="list-style-type: none"> • Respective Clusters • Respective Training/Education Institutions <ul style="list-style-type: none"> o RADA o EMC o UTech o UWI • UCJ • HEART/NTA • Ministry of Labour 	Y1 – Y2
Increased productivity across priority sectors.	Productivity index or productivity indicator by industry.	Benchmarks to be established in Y1.	<ul style="list-style-type: none"> • Provide support for firms and industries to benchmark to international standards. • Develop performance-based pay models that firms may adopt. • Provide technical assistance to firms to select and implement the model that best suits their enterprise. • Develop an institutional framework for the national values and attitudes programmes. 	Lead: Productivity Centre Partners: <ul style="list-style-type: none"> • Ministry of Labour • JMA • PSOJ • JEF • OPM • Sector entities 	Y1 – Y2

2. Innovation and Technology / Capacity Diversification

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 industries are entered (for target industries). 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 industries, 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

- Inadequate investments in Science and Technology institutions that are geared to priority productive industries (such as Agro-processing and ICT) and supporting industries (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 industries, 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 the 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

3 CROSS-CUTTING INDUSTRY STRATEGIES

product development, aimed at fostering increasing innovations (that lead to diversification).

- Industrial and technical development functions and services such as prototype development and testing for commercialising through divestment are no longer provided at adequate levels and affordable prices.
- 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.
- 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).

Support Planned / Ongoing Initiatives

A key constraint to pursuing and implementing innovation and technology acquisition towards capacity development and diversification is the ability to finance such initiatives. It is therefore important to support initiatives related to reduction in GOJ spending and debt levels that will enhance the business environment.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Increased focus and application of research and development and of technology innovation in export sector.	<p>Number of new product developments (from collaboration) that are developed.</p> <p>Number of products improved.</p>	<p>Beverages: 5 ICT: 2 Agro-processing: 3 Education: 1 Aquaculture: 2</p> <p>ICT: 2 Agro-processing: 3 Education: 1 Aquaculture: 2 Mining: 1</p>	<ul style="list-style-type: none"> • Implement policies and programmes to boost the country's capacity for technology generation, adoption and transfer. • Obtain/offer technical assistance for firms in the selection and acquisition of modern and appropriate equipment/models and techniques for new product/service development. • 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. • Expand the remit of the SRC to embrace/support additional export industries. • Identify, obtain and allocate adequate resources to the industries to strengthen and facilitate implementation of new product development capabilities. 	<p>Lead: MIIC</p> <p>Partners:</p> <ul style="list-style-type: none"> • SRC • JTI • JEA • MoF • JMA • PSOJ • SBAJ • JAPA <p>Lead (food): SRC</p> <p>Lead (ICT): JSDA</p> <p>Lead (Edu): JSC</p> <p>Lead (Min): MGD</p>	Y1

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
	<p>Number of firms introducing new products and services.</p> <p>Number of firms that improve existing products and services.</p>	<p>10</p> <p>45</p>	<ul style="list-style-type: none"> Obtain/offert technical assistance for firms in the selection and acquisition of modern and appropriate equipment and techniques for new product development. Provide project support for new product/service development and diversification. Enhance client service capability of service providers in the specialised areas identified. 	<p>Lead: JEA</p> <p>Partners:</p> <ul style="list-style-type: none"> JTI JBDC Sector entities 	Annual
Increased investment (and re-investment) ratio into productive capacity.	Value of (re) investment in the productive sector.	Baseline required	<ul style="list-style-type: none"> Advocate for more effective Incentive Regime to support target industries. <ul style="list-style-type: none"> Review and assess the impact and effectiveness of current incentives regime (in the context of high yield on GoJ debt). Make recommendations for regimes that will allow greater returns from investing in the productive sector. Advocate for incentives that provide tax deductions for reinvestment into capacity development and diversification. 	<p>Lead: PSOJ</p> <ul style="list-style-type: none"> MIC Ministry of Finance 	Y1-Y2
Improved market information that drives innovation and diversification.	<p>Number of product/market opportunity guides developed per year.</p> <p>Number of group interventions.</p>	<p>1 report for each priority sector</p> <p>1 for each priority sector</p>	<ul style="list-style-type: none"> Develop 'new product' market reports. <ul style="list-style-type: none"> Produce market reports on new product opportunities, any related standards and entry requirements, and guidelines on market entry strategies for exploiting these. Deliver group workshops to inform clients of new opportunities. Integrate the communication and response strategy related to opportunities into export client management services (information and advisory services). 	<p>Lead: JTI</p> <p>JEA Cluster/ Sector support entities</p>	Annual

3 CROSS-CUTTING INDUSTRY STRATEGIES

3. Transportation

Issues

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 road conditions and road traffic congestion.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Increased strategic alliances to establish supply routes to key markets resulting in enhanced conveyance of export produce to market by air.	Percentage increase in volume of air cargo exports.	8%	<ul style="list-style-type: none"> • Negotiate alliances with air carriers to facilitate optimal transportation routes for goods and services. • Advocate for flexi time in the air cargo industry. 	Lead: JEA Partners: <ul style="list-style-type: none"> • Ministry of Transport • Ministry of Foreign Affairs and Foreign Trade 	Y1
Competitive air, road and rail infrastructure through enhancement to existing infrastructure.			<ul style="list-style-type: none"> • Package and promote the investment/entrepreneurial opportunities in rail transport and related storage. • Maintain road infrastructure through use of applied technologies. 	Lead: Ministry of Transport Partners: <ul style="list-style-type: none"> • MIIC • JTI 	Y1 -Y2

4. Energy

The Context: Energy is central to Jamaica’s economic development and productivity. According to the Green Paper on Energy⁹ Jamaica 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 industry. 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 industries (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.

Issues

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

Support Planned / Ongoing Initiatives

The key national initiative is the National Energy Policy, which at the time of this strategy development exercise is being revised. The issues and objectives are aligned, based on the preliminary versions and there is confidence that a successfully executed Energy Policy should facilitate the desired improvements.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	TIMELINE
				ENTITIES	
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.	The ratio of energy cost to total cost. The cost of generating energy.	Industry baselines to be established from initiative.	<ul style="list-style-type: none"> • Establish baseline data for energy usage and percentage of costs by industry. • Promote wind power generation, and solar electrical generation technology (solar heating and solar cooling) and provide technical assistance to assess feasibility and support implementation. • Develop policy and administrative programme for the implementation of net metering. • Write Position Paper to advocate for the current incentives on low cost financing to cover the outlay of capital to finance renewable energy systems and expand the incentives to all companies implementing energy saving technologies. • Develop policy, implementation guidelines and timing on co-generation of energy for large energy consumers. • Implement demand reduction / demand management programmes to reduce energy demand. 	Lead: Ministry of Energy Partners: <ul style="list-style-type: none"> • OUR • JPSCo • MIIC • JMA • Ministry of Finance • SRC • Financial Institutions • JEA 	Y1-3

⁹ The Jamaica Energy Policy 2006 - 2020

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 business firms in the form of burglary, internal theft, and extortion as reported in a study.¹⁰ 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.

Issues:

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

- 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).
- Praedial larceny/pilferage results in losses to enterprises that decrease their profitability, especially farms including aquaculture, where it is a major cost/loss factor.
- Intellectual property theft
 - a. Piracy in music/film industry
 - b. Information theft
- Difficulty in attracting foreigners to consume services in Jamaica, such as in the Education industry that faces crime as a deterrent in attracting foreign students.

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

Support Planned / Ongoing Initiatives

Achieve secure and more enabling environment to facilitate trade

- Contribute to the improvement of national security by supporting the implementation of the

¹⁰ A Landscape Assessment of Jamaica Enterprises (2008)

recommendations below, made by the PSOJ's National Planning Summit 2007:

- 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) improving 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.
- Support the development of key partnerships with the Police in the business community.
- Continuously advocate for ruthless focus on improving our national security.
- Support the legislation of cyber crime.
- Support efforts related to strengthening the justice system and its reform.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
A secure environment which is more enabling to trade.	Reduction in the cost of security. Reduction in percentage of production lost to theft.	Baseline (by sector) to be developed in year 1. Baseline (by sector) to be developed in year 1.	<ul style="list-style-type: none"> • Develop capacity of exporters to establish security policy and guidelines. • Facilitate BASC Certification and CTPAT Certification by building awareness of its benefits and encouraging implementation within exporting firms. • Obtain financing and technical support for firms implementing BASC. • Conduct public awareness about IP piracy and its impact on economic and social development. 	Lead: JEA Partners: <ul style="list-style-type: none"> • JCC • Ministries of National Security and Justice • JMA • JIPO • Fiscal Services • Customs • OPM • SAJ 	Y1-Y2

6. Trade Facilitation

The Context: Trade facilitation involves government regulations and all public industry 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.

Issues

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 administrative time and money 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.
 - 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.

Support Planned / Ongoing Initiatives

A more business friendly (trade facilitation) service delivery network.\

- Improve the service delivery of the institutions that impact transaction time and cost.
- 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.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
A more business-friendly (trade facilitation) service delivery network.	(Same as facilitation study).	(Same as facilitation study).	<ul style="list-style-type: none"> • Improve the service delivery of the institutions that impact transaction time and cost: <ul style="list-style-type: none"> (i) Improvement in the service delivery of the institutions, such as Jamaica Customs and Trade Board electronic processes. (ii) Implementing the Trade Facilitation benchmarking study’s export-related recommendations highlighted in the previous section. • 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. 	Lead: MIIC Partners: <ul style="list-style-type: none"> • Customs • Trade Board • JTI • Ministry of Finance • Fiscal Services • BSJ • Ministry of Agriculture 	Y1-2

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Reduced cost of doing business through increased cost efficiency of the sectors.	Reduction in export processing errors (reported by the Trade Board) Reduction in container costs.	80% accuracy reported.	<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 scale through: group purchasing, outsourcing of business processes, partnerships, supplier efficiency, etc. • 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. 	As above plus <ul style="list-style-type: none"> • SAJ • Productivity Centre • JEA • JTI • Trade Board • Export Council 	Y1-3

7. National Image and Branding

The Context: 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 coordinate 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 conceptualisation of Jamaica, and 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.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
<p>A national coordinated effort to uphold Jamaica's reputation through a nation branding framework and programme supported by creation and management of Intellectual Property.</p>	<p>Creation and approval of a national branding framework.</p>	<p>Framework approved Y1.</p>	<ul style="list-style-type: none"> • Develop a national branding strategy <ul style="list-style-type: none"> o Secure Cabinet approval to address the mechanisms for the development of the Nation Branding Strategy in Phase I. o Execute using the suggested three phase approach: <p>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.</p> <p>Phases II & III: This phase focuses on the implementation and monitoring of the Strategy.</p> • Review current Intellectual Property 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, with improvements in the service delivery, such as the planning timeframe and scope, activity management and follow-up. 	<p>Lead: OPM</p> <p>Partners:</p> <ul style="list-style-type: none"> • MIIC • Ministry of Tourism • MCYS • JIPO • JTI • JEA • JCC • JMA • MFAFT • JTB • CIB • JTBO • SBAJ • Ministry of Finance • Diaspora Entities yet to be determined 	<p>Y1</p>
	<p>Enacting supporting legislation.</p> <p>Number of collective marks registered.</p> <p>Number of GIs registered/ protected.</p>	<p>Supporting legislation in Y2.</p> <p>3</p> <p>3</p>		<p>Y2</p>	

8. Trade Promotion

The Context: 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 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.

Issues

- While there is a lack of understanding in interpreting trade agreements, stakeholders (including the private industry 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 industries, such as the agro-processing industry, leaving gaps in services and support to other industries.
- More focused effort is needed in promoting benefits of protecting intellectual property¹¹ in target markets.
- Fragmented approach in (i) our promotional efforts, (ii) exploiting national branding and (iii) protecting national marks and symbols*.

¹¹ *will be dealt with under National Image and Branding

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
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 markets selected for each industry, and consolidated by market.	<ul style="list-style-type: none"> • Provide market access information to the export community on new market opportunities arising from trade negotiations. • Engage the private sector and relevant stakeholders in trade negotiations and trade adjustment plans. 	Lead: MFAFT Partners: <ul style="list-style-type: none"> • ECs • JEA • JTI • JMA • PSOJ • SBAJ • JTAT • Sector entities 	Annual
Minimised negative impact from market access changes.	Positive growth rates for exports to the specific markets are maintained.	Baseline export growth rates will be used for any market to be tracked for market access changes.	<ul style="list-style-type: none"> • Provide alerts to private sector and relevant stakeholders of proposed and pending market access changes. 	Lead: MFAFT Partners: <ul style="list-style-type: none"> • ECs • JEA • JTI • JMA • PSOJ • SBAJ • JTAT Sector entities	Annual

9. Business Development and Export Readiness

The Context: 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 industry 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 industry 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

- 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.
- 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.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
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.	<p>Percentage of registered exporters / active exporters receiving export competency training.</p> <p>Percentage 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"> • Develop and implement a curriculum for introductory supervisory and management export training. • Establish Human Resource planning mechanisms to determine the skills necessary to meet national and global demands. • Utilise national skills report to plan for education and training to meet the opportunities and fill any gaps in HCD programmes. • Train personnel within public and private sector primary service institutions (JTI, JEA, JBDC, ECs, etc.) to provide cutting-edge business and export competency services. • Build institutional capacity to certify service providers and training institutions in keeping with globally-recognised certification standards. • Deliver ongoing business development training to exporters in cost accounting, control, record keeping, financial reporting, and business performance reporting and loan applications. • 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 competitiveness. <ul style="list-style-type: none"> o Design and deliver awareness campaign tied to productivity results from training. o Advocate for tax credits for enterprises that invest in training and education. 	<p>Lead: JTI/ JEA</p> <p>Partners:</p> <ul style="list-style-type: none"> • JBDC • HEART / NTA • PIOJ • NCTVET • Ministry of Labour • Relevant Training organisations • SBAJ • JMA • JAS • Ministry of Education • BSJ • JIS • MFAFT • SRC • Jamaica Productivity Centre 	Y1

10. Financing

The Context: The export industry 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 industry by way of creating an economy in which capital is equitably and competitively available for the industry.

Unavailability of affordable financing has long been cited as one the major factors inhibiting the expansion of the business industry in general, and the export industry specifically. According to the NES case document¹² this has significantly and negatively impacted the rate of entrepreneurship in Jamaica and thus the export industry. According to a report from a study done on MSMEs,¹³ following the financial industry 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 they?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 report¹⁴ 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

- High Public Debt adversely affects investment and productivity by distorting the allocation of investment toward less productive areas; and reducing the scope for public industry 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 to find investors for businesses.
- Inability of enterprises to provide quality plans and proposals supported by financial statements.
- 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.
- Intellectual Property not considered to have commercial value.
- There are no industry figures to prove an attractive return on investment.

¹² A Case for a National Export Strategy Jamaica's Response Paper

¹³ Policy Report for The Jamaican MSME Industry

¹⁴ Policy Report for The Jamaican MSME Industry

Support Planned / Ongoing Initiatives

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.

- 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*.
- Implement measures to improve the financing offered through the GOJ and donor agencies by:
 - (i) Adopt Guiding Principles for GOJ-Supported Lines of Credit,
 - (ii) Review of existing lending Mechanisms,
 - (iii) Special Incentives to Guide Allocation of Funds to Critical Industries,
 - (iv) Adopt General Guiding Principles regarding Lending rates for MSMEs,
 - (v) Expand the reach of supporting agencies to enable SMEs and MSMEs to take advantage of donor funding,

- (vi) Develop a collaborative approach between public and private industry.

Through the National Planning Summit, the efficiency of property title transfer is being improved. This should facilitate the use of land in accessing capital.

A national initiative to establish and operate Credit Bureau* is also underway. The improved ability of institutions to assess credit risk is welcome.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Affordable financing that is accessible and available to allow investment in operating capital and reasonable returns on investment.	Number of export enterprises receiving capacity and counselling support for accessing financing.	100	<ul style="list-style-type: none"> • Build awareness of all available financing packages and incentives being offered to the sector. • Finalise and implement sustainability plan for CFB. • Update FundingOasis.com. • Strengthen the Technical Assistance services offered by JTI and other institutions. 	Lead: MIIC	Y1-3
	New policy measure introduced to address concerns related to access to finance.	2	<ul style="list-style-type: none"> • Review the current structure of incentives and assess is the resulting performance and impact at the current level of use to determine whether adjustments are required to foster reinvestment. • Introduce factoring as a financing option. • Develop a mechanism for the use of Intellectual Property as collateral to secure loans. • Encourage the modification of current borrowing requirements. 	Partners: <ul style="list-style-type: none"> • Ministry of Finance • BoJ • DBJ • ExIm • JBA • JCC • PSOJ • JEA • JTI/CFB • JIS • SBAJ • JMA • JBDC • JIPO 	
	Percentage of firms reporting access to favourable financing / number of firms accessing first-time financing.	25	<ul style="list-style-type: none"> • 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. • Support the creation of new types of financial products for MSMEs through establishment of financing via: <ul style="list-style-type: none"> o Venture Capital, Angel Funding*. o Expand and promote Lease Financing. 	<ul style="list-style-type: none"> • Credit Unions • JSE • Lenders 	

11. Packaging

The Context: 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 Assessment,¹⁵ in Jamaica, packaging costs account 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 rationalisation 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 industry. 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 industries.

Issues

- Local packaging industry unable to supply the needs of industries – especially the Agro- Processing sub industry.
- 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.

¹⁵ Competitiveness Assessment (Poot & Brown, 2006)

3 CROSS-CUTTING INDUSTRY STRATEGIES

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Improved access to affordable quality export packaging.	Percentage reduction in packaging costs.	15% *Food and processing sectors only.	<ul style="list-style-type: none"> Conduct consultation to identify most cost-effective options for quality packaging: <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) to benefit from economies of scale. Develop packaging research and training capacity. Implement training programmes in packaging innovation and design. Work with Exporters to increase knowledge of how packaging may be utilised for differentiation in export markets. 	Lead: JEA	Y1
	Percentage of value in imported packaging materials.			Partners: <ul style="list-style-type: none"> JMA Cluster / sector support entities 	
					<ul style="list-style-type: none"> EMC/ UTech JBDC CABA
				<ul style="list-style-type: none"> EC/BIPs JTI JEA 	Y1

12. Quality Management

The Context: Inability to meet international quality standards is a key issue facing exporters, and exporting firms, especially in the agro-processing industry, 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

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

- High costs of some basic services.
- 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.
- Costs of services such as product testing and certification provided by the private industry are in

some cases still prohibitive, and in other cases the quality of service provided by these professionals is variable.

- High costs of compliance with international standard requirements.
- 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)¹⁶.
- Low appreciation for quality and its importance to competitiveness.
- A perceived lack of technical and experienced personnel in the government regulatory bodies.
- The perception by exporters that government regulatory bodies are too focused on commercialisation rather than regulation which results in lack of transparency.

¹⁶ PIOJ, 2007 and Sanjay Ross, SRC, personal communication, February 7, 2008

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Enhanced capacity of exporters to provide quality goods and services that meet international standards.	<p>Percentage of exporters (registered or active) receiving quality certification.</p> <p>Number of enterprises benefiting from awareness initiatives.</p> <p>Percentage of firms re-certified.</p> <p>Reduction in processing times by the BSJ</p>	<p>Agri: 50%</p> <p>Aqua: 40%</p> <p>Bev: 80%</p> <p>ICT: 25%</p> <p>Mining: 20%</p> <p>300</p> <p>90%</p> <p>Baseline required.</p>	<ul style="list-style-type: none"> Expand current internationally-funded quality certification programmes and attract new ones in order to offer cost-effective quality certification for firms. Educate exporters on the long term benefits of quality management. Encourage enterprises to achieve and maintain HACCP and ISO standards. Monitor (BSJ) certified firms on conformance for maintaining certification. Increase the levels of experienced technical experts in regulatory bodies. Increase focus on quality assurance outputs. 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. Coordinate the inspection regime to which exporters are subjected, combining or integrating inspections where they have common elements. (e.g. health and quality inspection). Implement a mechanism to track emerging / new requirements, and communicate these to export sector and provide support for meeting new requirements. 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 compliance. Package private sector investment opportunity to establish additional accredited labs with sufficient. 	<p>Lead: MIIC</p> <p>Partners:</p> <ul style="list-style-type: none"> BSJ JEA JTI Min Ag (VSD, PQ) Min. Health CABA NVCQ JANAC SRC MIAS JMA 	<p>Y1-3</p> <p>Annual</p>

13. Trade Information

The Context: Information is critical to the success of any organisation. Dissemination of information is always a challenge for 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 emerge, reliable trade information is becoming increasingly important.

According to the NES Response Paper,¹⁹ 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). Five thousand (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.
- Lack of information about regulatory changes and other export requirements resulting in delays and additional charges.



¹⁹ The Case for a National Export Strategy

3 CROSS-CUTTING INDUSTRY STRATEGIES

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Increased provision of (useful/ quality) trade information from enhanced trade service providers.	Number of standard market reports generated for distribution.	Sector reports – 9 Market reports – 6	<ul style="list-style-type: none"> Strengthen relationships with the academic community to conduct research and data collection for the export industry. Conduct continuous competitiveness analyses of all export industries and make the data available for development of the industry. Strengthen and promote the Export Centre (EC) and Business Information Points (BIPs) network. Increase information 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. Use electronic media for dissemination (SMS, e-mail, social networking sites). 	JEA/JTI (EC/BIPs) <ul style="list-style-type: none"> SRC UWI Utech PIOJ STATIN 	Annual
Improved capacity of trade info service providers providing increased dissemination of tailored trade information.	Trade information programme for partners developed. Number of partner staff trained on trade information gathering, packaging and dissemination.	Programme developed and executed in year 1. 20	<ul style="list-style-type: none"> Build capacity of a team of skilled information professionals (with training the trainer component). 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. Sign MOU with MFAFT to engage overseas representatives in gathering and analysing market intelligence for target sectors within their markets. 	Lead: Partners: <ul style="list-style-type: none"> EC/BIPs MFAFT JEA JTI JMA PSOJ SBAJ 	Y1-2



4.

Priority Industry Strategies

Agro-Processing

(Food and 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 industry 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 industry to be a reliable and consistent contributor to the growth of non-traditional exports.

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

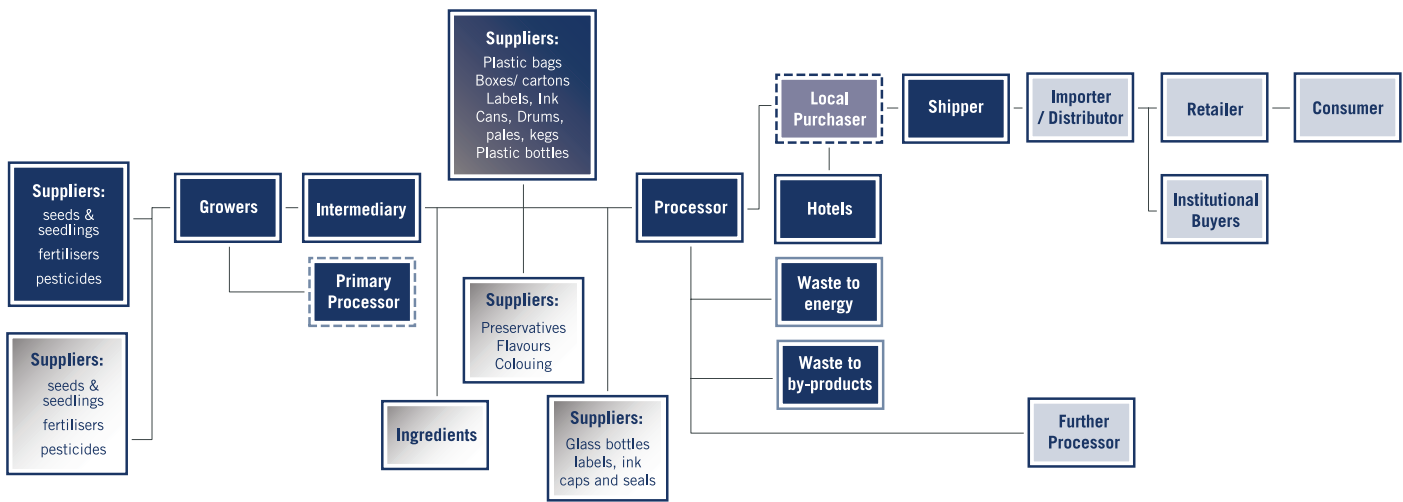
¹ 2007 figure not available.

² One export category recording significant growth, but which is not sustainable was scrap metal.

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 adopting full global best practices in order to achieve improved efficiencies and productivity.
- To improve JAPA so that it is a vibrant association driving the industry’s development policies and programmes.

Value Chain - Agro-Processing



Current Value Chain Dynamics

- Improper post-harvest management
- Inadequate quality control
- Excessive leakages especially ingredients and packages
- Lack of investments in a primary processing facility
- Insufficient backward linkages with hotels (farmers)

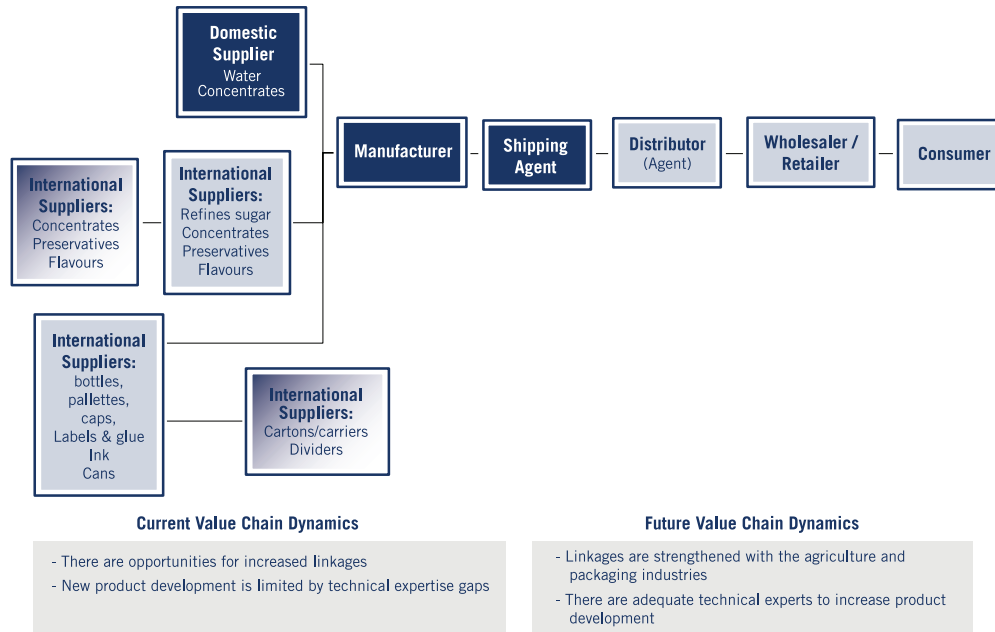
Future Value Chain Imperatives

- Quality control management entrenched along value chain
- Post harvest management provided by well resourced extension services
- Primary processing facility that is accessible to industry (all processor)
- Aggressive international marketing penetration and development by 15%

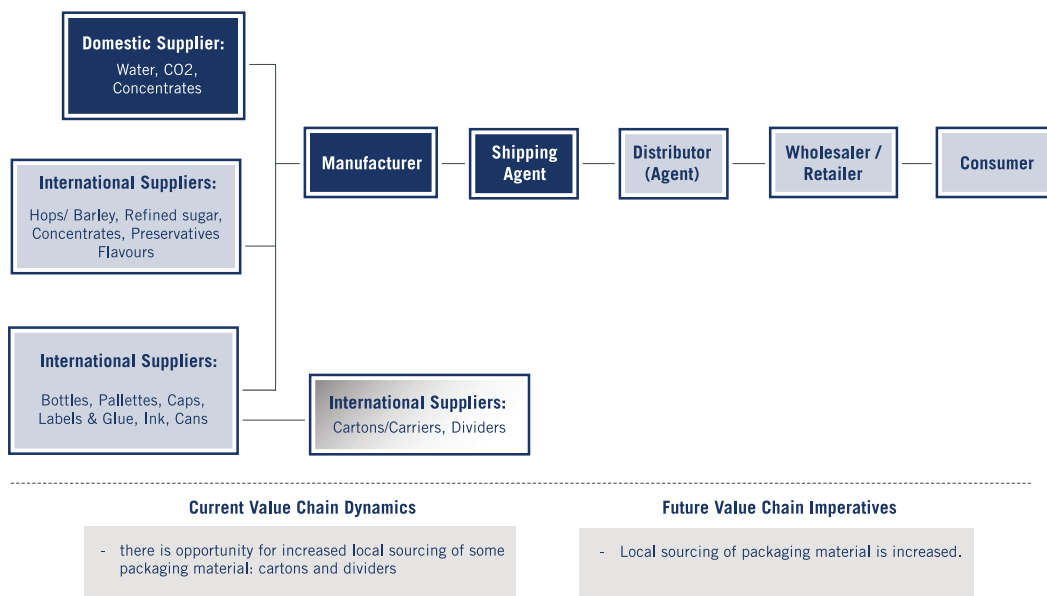
Key

	Current Value Chain Activity		Future Value Chain Activity (i.e. not currently being done)		International Value Chain Component
	Currently a component of the National Value Chain		To become a component of the National Value Chain		Gradient fill is part local and part international

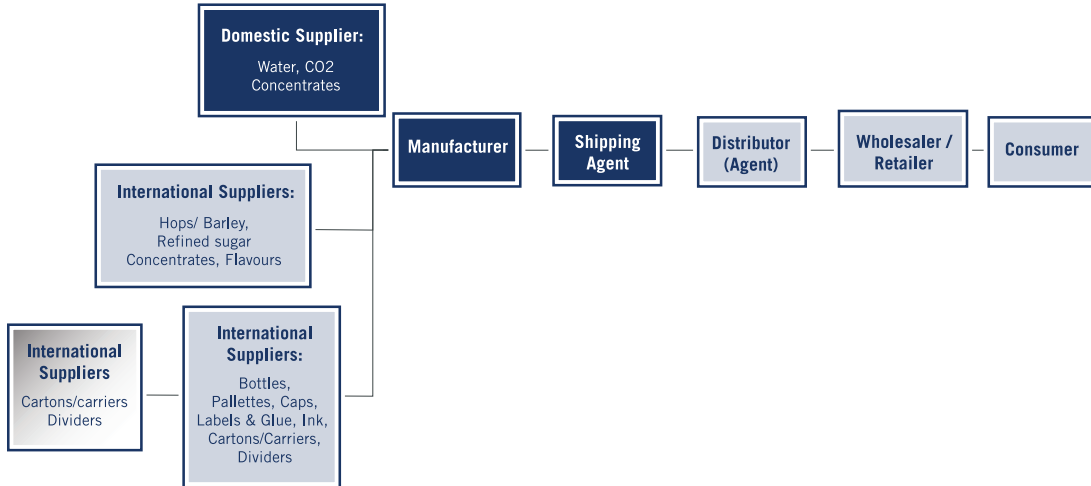
Value Chain - Non-Carbonated Beverages



Value Chain - Carbonated Beverages



Value Chain - Beer



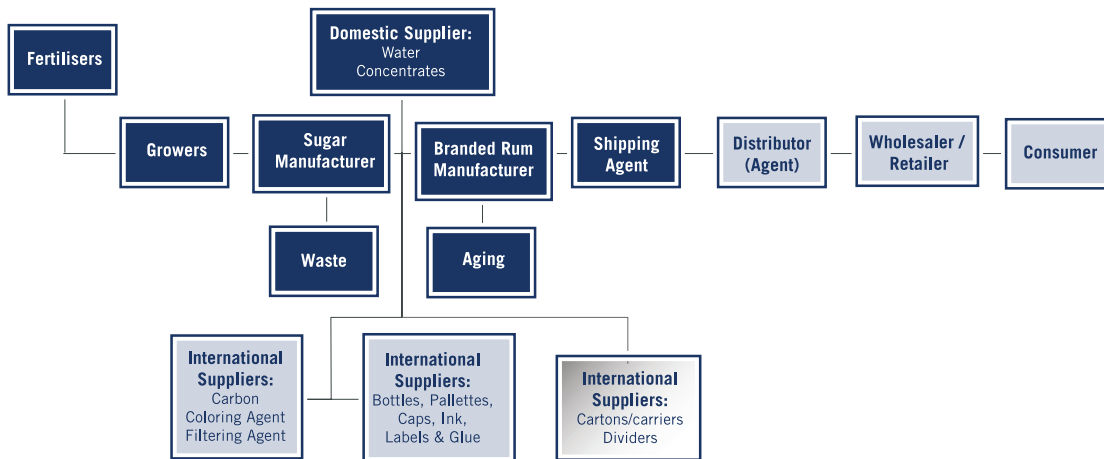
Current Value Chain Dynamics

- Opportunity for greater sourcing of some packaging material
- Efficiencies to global standards have been attained.

Future Value Chain Imperatives

- Global standards are maintained

Value Chain - Branded Rum



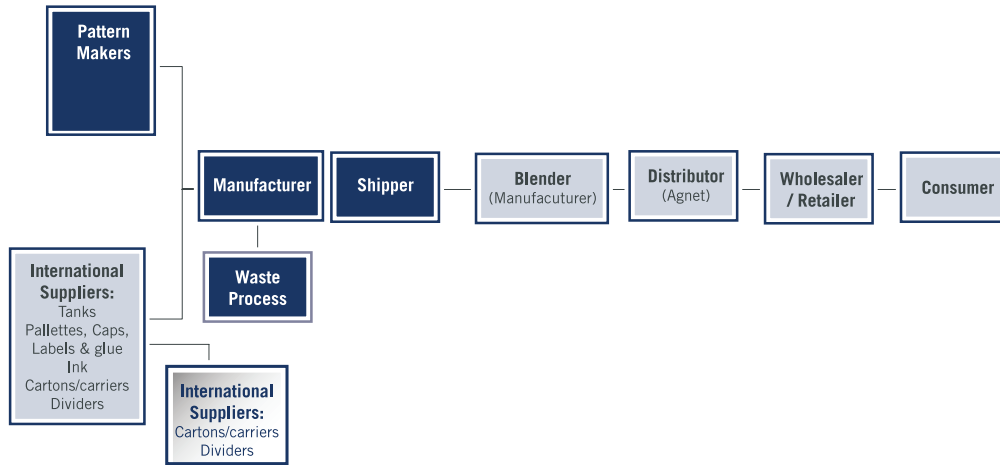
Current Value Chain Dynamics

- there is an opportunity to increase export value by exporting more branded rum, than bulk rum
- there are opportunities to explore additional options for use of waste and by-products

Future Value Chain Dynamics

- the value of rum exports increases with increased export of branded rum
- industry efficiencies and profitability improve with increased use and revenue from waste and by-products
- there is local sourcing of cartons and dividers

Value Chain - Bulk Rum



SWOT Analysis

STRENGTHS

- 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.
- World-class enterprises within the industry 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.

WEAKNESSES

- 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).
- No IP protection in place.
- 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-focused.
- Limited availability of technical skills necessary to build viable businesses.

OPPORTUNITIES

- 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).

THREATS

- 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 industry.
- Increasing security costs.
- Continued urban migration reducing the labour force for the industry.
- Poor perception of agriculture as a viable economic industry.
- 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.
- An unstable FX regime – based on the rate at which it changes.
- No competitive interest rates to allow for reinvestment in the industry.



STRATEGY AT A GLANCE

Vision

A dynamic non-traditional export industry 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

SUPPLY SIDE (BORDER-IN)

Flexible financing for the agriculture industry is provided.

Effective re-tooling resulting from improved expertise.

Product development partnerships result in new products successfully commercialised.

More technical skills available in the industry.

TRANSACTION COST OF BUSINESS (BORDER)

Praedial larceny is significantly reduced.

Lower, standard port charges are introduced.

DEMAND SIDE (BORDER-OUT)

There is increased industry participation in policy development and negotiations. Support provided to cover high promotions costs.

Competing illegal exports declines.

Client Perspective

TRADE INFORMATION

Flexible trade finance programme developed.

STANDARDS AND QUALITY MANAGEMENT

There is improved enforcement of regulations and standards.

There are adequate testing facilities making it difficult to assess products analytically.

BUSINESS DEVELOPMENT AND EXPORT READINESS

The technical expertise for production of quality products is at global standards.

Marketing management as well as business proposal development is improved.

FINANCE

Affordable and accessible finance made available.

PACKAGING

Affordable quality export packaging made available locally.

Institutional Perspective

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

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT ENTITIES	TIMELINE
THE DEVELOPMENT PERSPECTIVE					
Investment					
Cost of Doing Business					
To increase exports by 15% each year			<ul style="list-style-type: none"> Develop feasibility and business model for a primary processing facility. Develop investment opportunity profile and promote the opportunity. 	<ul style="list-style-type: none"> JAPA JTI 	
Human Capital Development / Productivity			Please refer to HCD agro-processing tertiary programme.		
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN					
Capacity Development	Percent of factories increasing product range by 20%	30%	Support the priority competitiveness initiatives identified in the relevant cross-cutting strategies.		
60% of the industry has adopted full global best practices in order to achieve improved efficiencies and improve productivity	Percent of factories increasing yield of products by at least 50% Each processor obtains a retooling plan	30%	<ul style="list-style-type: none"> Identify and obtain resources to contract technical expertise to advise processors on retooling. Inform enterprises of incentives and schemes to foster retooling. 	<ul style="list-style-type: none"> JAPA JEA JTI 	
Capacity Diversification					
To introduce 5 new products by year 2012 to the export market			<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. 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. 	<ul style="list-style-type: none"> JEA JAPA JTI 	
BORDER					
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. 	<ul style="list-style-type: none"> JAPA RADA Ministry of Agriculture 	

4 PRIORITY INDUSTRY STRATEGIES

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT ENTITIES	TIMELINE
BORDER (continued)					
Cost of Doing Business (continued)					
			<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. 	<ul style="list-style-type: none"> JAPA 	
			<ul style="list-style-type: none"> Continue lobby for strengthening of initiatives aimed at reducing Prædial Larceny. 		
BORDER-OUT: ALL CROSS-CUTTING INDUSTRY INITIATIVES ARE RELEVANT					
THE CLIENT PERSPECTIVE: ALL CROSS-CUTTING INDUSTRY INITIATIVES ARE RELEVANT					
Quality Management					
	Percent industry compliant to HAACP, ISO 9000 (or ISO 200) and 14000	50%	<ul style="list-style-type: none"> Improve enforcement of regulations and standards. 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 by. 		
			<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"> RADA 	
			<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. 		
THE INSTITUTIONAL PERSPECTIVE					
To improve JAPA so that it is a vibrant association driving the sector's development policies and programme			<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"> JAPA 	
			<ul style="list-style-type: none"> Provide support for strengthening JAPA. 	<ul style="list-style-type: none"> JEA 	



Aquaculture

Fish, crustaceans and molluscs have been one of Jamaica's best performing exports in the non-traditional export category; making the aquaculture industry 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 USD\$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.¹⁸ 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.

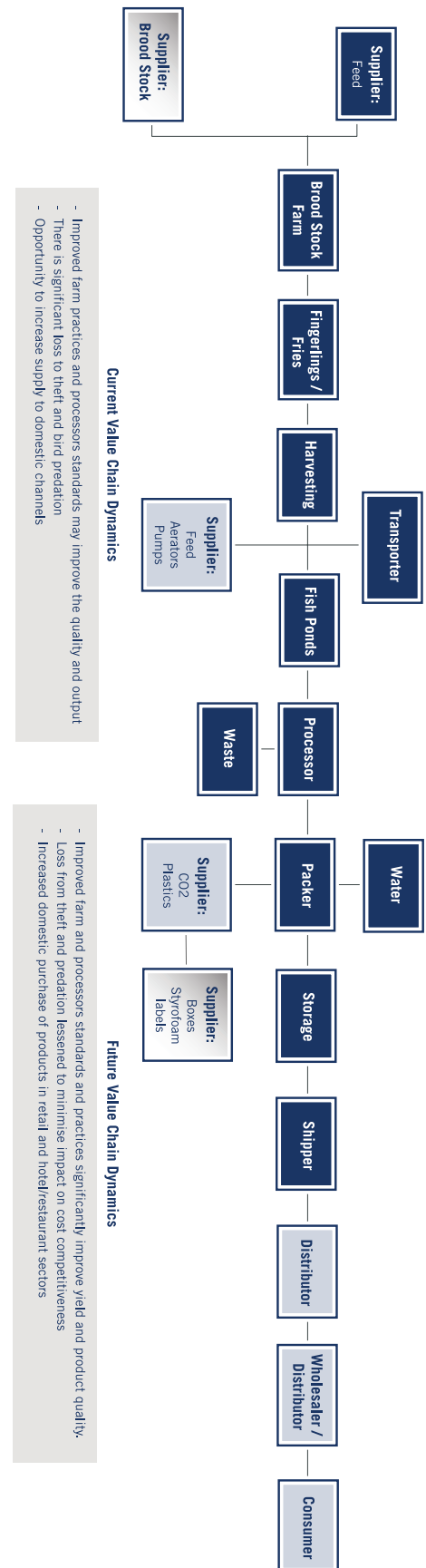
Aquaculture is subsumed within a larger category Agriculture, Fishing and Forestry, which contributes USD\$14.5m to GDP, equivalent to 5.9%.¹⁹

The greatest challenges and opportunities for the industry 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.

¹⁸ Exports, 2003-2007 (Statistical Institute of Jamaica, 2008)

¹⁹ Economic and Statistical Survey of Jamaica 2006 (Planning Institute of Jamaica, 2007)

Value Chain - Farm Raised Fish



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

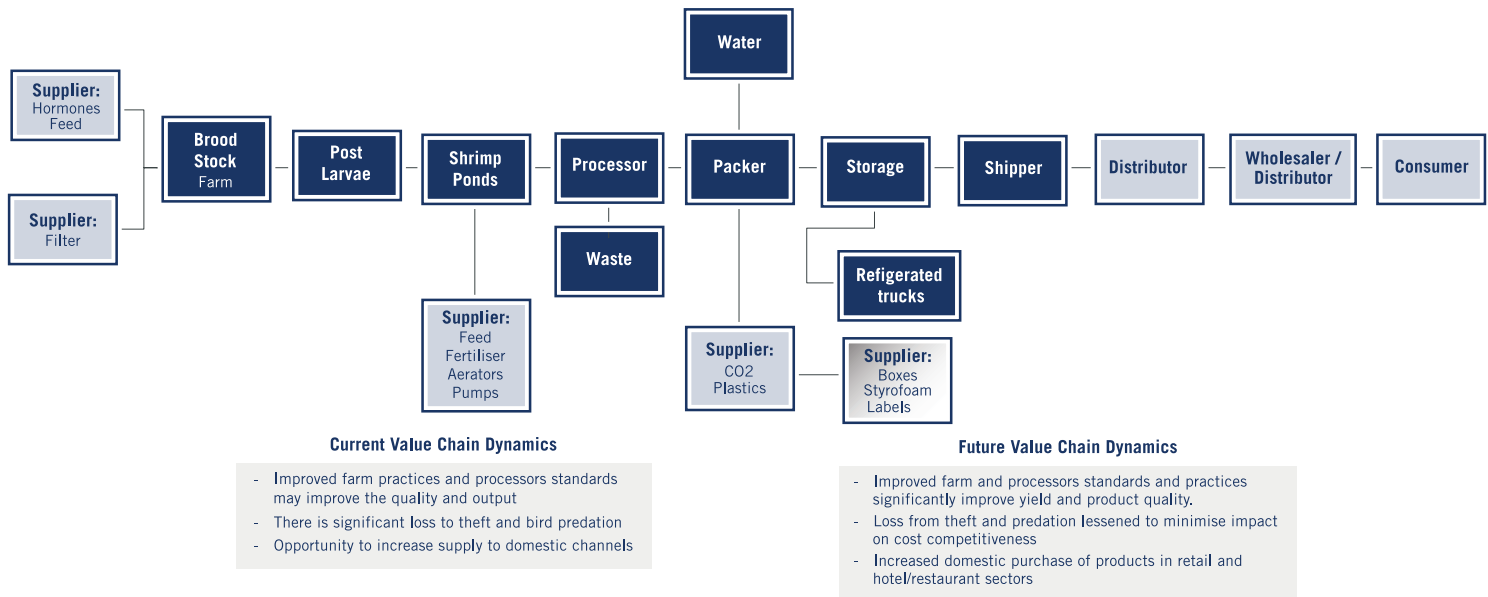
Objectives

- 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).
 - 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.

Key

	Current Value Chain Activity		Future Value Chain Activity (i.e. not currently being done)
	Currently a component of the National Value Chain		To become a component of the National Value Chain
	International Value Chain Component		
	Gradient fill is part local and part international		

Value Chain - Farm Raised Shrimp



Approaches

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

SWOT Analysis

STRENGTHS

- Infrastructural capacity in place to produce between 2 and 10 times as much of the current tilapia output.
- Technically competent farm owners, managers and operators - Most enterprises have well trained persons in fisheries management, and related sciences including postgraduate training.
- Enterprises typically aware of technologies and how they may be applied to their farms – and therefore able to make the right strategic decisions for improvements.
- General industry and related business awareness for success exists among the firms.
- History of collaboration within the industry and openness to future collaboration.
- A strong and dedicated cluster has been formed.

SWOT Analysis (continued)

WEAKNESSES

- Weak to no advocacy from the industry, which may not yet realise its economic and social significance, and potential strength.
- Lack of funding for working capital financing, re-financing and upgrading.
- Poor perception of fresh-water fish in terms of taste and quality (compared to marine product) that is based on inferior imports and some farms' products.
- Poor production practices at some farms.

OPPORTUNITIES

- There is growing demand for Tilapia in the USA (which exceeds their production and would be filled by imports).
- High local demand for marine Tilapia.
- A sustainable and viable option to the marine products sub-industry, which needs proper environmental management.
- The new and planned high-end restaurants and non-all-inclusive hotels provide a market opportunity based on the importance of quality to their operations.
- Availability of lands near/along the Jamaican coast for additional farms (and particularly salt-water farms).
- Opportunity to practice poly-culture to improve competitiveness.
- Individual members in the industry may leverage their strengths for collaborative initiatives, such as group purchasing.
- Growing domestic hotel industry presents a growing domestic export market.

THREATS

- Increasing theft in the industry.
- Weak import regulation enforcement.
- Poor policy and implementation of existing ones that facilitate increased import of cheaper product threatens the domestic industry's viability (lack of standards enforcement and in some instances, the lack of import standards despite the presence of export standards).
- Ease of circumventing import duties that makes imports cheaper (through under-invoicing).
- Imports (typically cheap poor quality) are competing with current buyers and preventing access to new buyers.
- Lack on an agriculture policy that could address some of the issues that threaten the industry.
- Inability to store large quantities of product for later distribution.
- Inability to access funds to undertake proposed initiatives.
- Impact of global crisis on demand in the hotel industry.

STRATEGY AT A GLANCE

Vision

The Jamaican Aquaculture Industry is a high export revenue earner that is globally recognised for high-quality primary and valued-added products.

Development Perspective

The Jamaican Aquaculture industry is a growing source of employment for rural and farm communities, and contributes to improving the balance of trade by reducing the levels of imports of fish and marine products.

Competitiveness Perspective

SUPPLY SIDE (BORDER-IN)	TRANSACTION COST OF BUSINESS (BORDER)	DEMAND SIDE (BORDER-OUT)
<p>Technical and professional skills in farm practices improved.</p> <p>Fish growth rates and hardiness increased.</p> <p>Investment and reinvestment in the industry increased.</p>	<p>Praedial larceny eliminated.</p> <p>Stricter standards for imports implemented.</p> <p>Turnaround time for clearance of imported farm production inputs improved.</p> <p>Farm road conditions, drainage canals and water quality improved.</p>	<p>Trade and marketing support in foreign markets for Jamaican aquaculture products improved.</p>

Client Perspective

TRADE INFORMATION	STANDARDS AND QUALITY MANAGEMENT	BUSINESS DEVELOPMENT AND EXPORT READINESS	FINANCE
<p>Customised market opportunities, market entry requirements and strategies provided.</p>	<p>Compliance with global standards:</p> <ul style="list-style-type: none"> • HACCP certified farms . • Quality monitoring of farm and production practices. <p>Optimal product-handling practised across the value chain.</p>	<p>Marketing and business proposal development competencies available.</p>	<p>Affordable and accessible financing made available.</p> <p>PACKAGING</p> <p>Utilisation of cutting-edge packaging maintained.</p>

Institutional Perspective

The Jamaica Fish Cluster is the focal point for coordinating the activities of firms in the industry, benefiting from the sustained support of the trade support network; especially an adequately resourced Veterinary Services Division. Allied to this, is the work of the Bureau of Standards to develop and implement relevant standards that encompass sanitation requirements of inputs, processing and time to market.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
THE DEVELOPMENT PERSPECTIVE					
To increase export	Percentage increase in value of export	Y1 – 5% Y2-3 – 15%	<ul style="list-style-type: none"> Implement a farm certification programme. Develop a quality standard and brand/label for the industry. Obtain processing facility certification. Structure an agreement to facilitate contract farming with existing processors. 	Lead: Ministry of Agriculture Partners: <ul style="list-style-type: none"> Cluster BSJ 	Y1
To increase the acceptability and accessibility of Jamaican aquaculture products as a main protein source			<ul style="list-style-type: none"> Assess and present sanitary measures, country of origin, and labelling, testing and certification requirements. Support Min.Ag and Customs upgrade and awareness to monitor imports. 	<ul style="list-style-type: none"> BSJ Ministry of Agriculture Customs 	Y1 – Y3
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN					
To improve production efficiencies, while reducing costs of production	Improved growth rate of fish by 10-20%	10%	<ul style="list-style-type: none"> Introduce new gene pool (fish). 	<ul style="list-style-type: none"> Cluster Ministry of Agriculture Agricultural Training Institutions 	Y1
	Improved feed conversion (from 2 to 1.5)	1.5	<ul style="list-style-type: none"> Obtain better quality feed. Develop business plan for Jamaica AquaFoods Limited. 	<ul style="list-style-type: none"> Cluster Ministry of Agriculture 	Y1
To increase recovery from 30%	Production recovery	80%	<ul style="list-style-type: none"> Improve grading and stocking of fingerlings. Introduce a progress tracking system to benchmark enterprises and assist in their attaining the desired standards/targets. 	<ul style="list-style-type: none"> Cluster 	Y1
	(Baseline: 50%)	70%	<ul style="list-style-type: none"> Promote the use of a nursery phase to prevent early introduction of fries into fish ponds. 	<ul style="list-style-type: none"> Ministry of Agriculture Cluster 	Y1
			<ul style="list-style-type: none"> Provide support to the cluster to engage in collaborative initiatives, such as group purchase of feed. 		Y1-2
			<ul style="list-style-type: none"> Promote poly-culture practice among farms. 		Y2-3
			<ul style="list-style-type: none"> Prepare business plan for the concept of having main processors collaborate with farmers previously contracted by AQJ. Foster implementation of the contract processor concept, based on feasibility outcome. 		Y1

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
			<ul style="list-style-type: none"> Provide technical (and extension) support to potential farmers for production of marine Tilapia. 		Y1
BORDER-OUT: ALL CROSS-CUTTING INDUSTRY INITIATIVES ARE RELEVANT					
To reduce the losses from theft and costs of implementing security measures	Percentage theft (of production) from farms	10%	<ul style="list-style-type: none"> Review and enforce Praedial larceny Act. Monitor application of Praedial Larceny Act, rather than Petty Thief Act. 	<ul style="list-style-type: none"> Cluster Ministry of Security & Justice 	Y1 Ongoing
Trade Facilitation					
To stem the import of inferior products			<ul style="list-style-type: none"> Increase training for improved monitoring of imports for verifying Import permit validity, customs valuation, and country of origin. 	Customs	Ongoing
THE CLIENT PERSPECTIVE					
Quality Management			(Same as certification initiatives designed to increase exports).		
Trade Promotion	Percentage increase in sales to the tourism sector	10%	Design and execute a linkage programme aimed at increasing purchase of local product by the tourism sector.		Y1
THE INSTITUTIONAL PERSPECTIVE					
To stem the import of inferior products	TBD		<ul style="list-style-type: none"> Update list of approved import countries <ul style="list-style-type: none"> Prohibit products treated with carbon monoxide. Zero trace of antibiotics. Disease presence in the country – any fish/shrimp viral disease. Parasites testing. Improve testing for bacteria, heavy metals and antibiotics, carcinogenic chemicals (melamine, malachite green). Improve country of origin vs. third country approval for importation based on VSD equivalent certification. 		Y2 Y1
To improve the delivery of quality services to the industry and thus facilitate product improvement (and competitiveness)	Number of firms receiving support	TBD	<ul style="list-style-type: none"> Improve (i) Date of processing / use best before standard (ii) Labelling standards. Begin enforcement of grading and net weight. Enhance institutional capacity of the VSD. 	<ul style="list-style-type: none"> BSJ 	Y1 Y2



Coffee

The Jamaican brand of coffee, Blue Mountain, remains an iconic brand globally and stands as a symbol of quality product from Jamaica. It is also an example of a protected mark, serving as inspiration and a viable model to several other products and product groups from Jamaica.

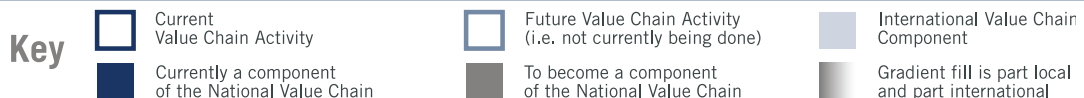
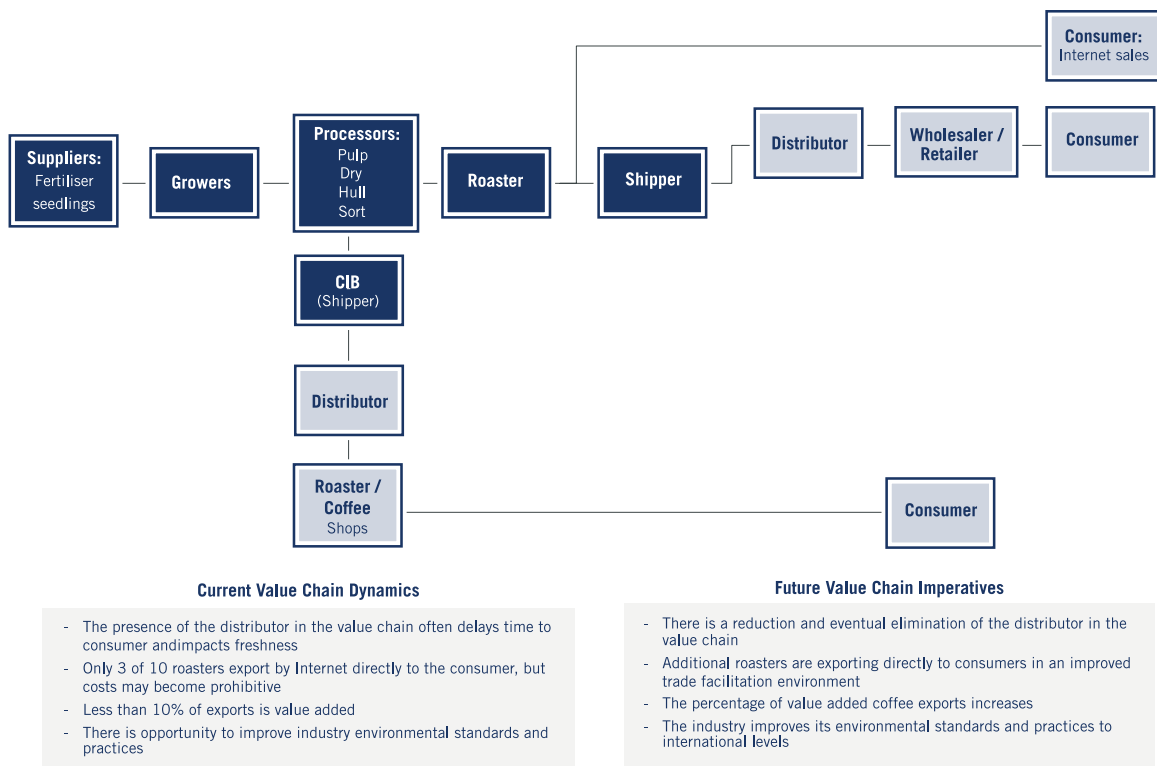
Coffee is grown in a region with full employment; something very few geographical areas are able to boast. In addition to its social contribution, there is significant export potential that may be realised from both increased production and export volume, increased value of export by expanding the percentage of value added production locally, as well as development of value-added products.

Coffee is one of Jamaica's top ten export products. Although not a major producer, the Jamaican product attracts the highest market value in export markets. Recent hurricanes have resulted in sharp reductions in production and export. However the recovery rates in growth have ranged from 30-44%.

Objectives

- To access new market niches in at least three countries.
- To increase the volume of exports by 20%.
- To improve 'clean bean' yield to 980 kilograms per hectare (from 590).
- To increase premium exports to 45% of total (green bean) export (from 23% baseline).
- To increase in sales to the tourism industry by 15%.

Value Chain - Coffee



SWOT Analysis

STRENGTHS

- Established product brands and very strong destination reputation.

WEAKNESSES

- Very little collaboration among members of the industry.
- Few processors and roasters have international certifications.
- The industry has not successfully told their story to drive sales, enhance social equity of the brand.
- The industry standards and requirements do not include social and environmental standards, and therefore it may be perceived as weak in these areas.

OPPORTUNITIES

- Opportunities exist for increasing use of current lands (fill gaps) to increase the production volume using currently dedicated lands.

THREATS

- Low domestic consumption limits sales for business and industry growth.
- Heavy concentration in the Japan market.



STRATEGY AT A GLANCE

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

SUPPLY SIDE (BORDER-IN)	TRANSACTION COST OF BUSINESS (BORDER)	DEMAND SIDE (BORDER-OUT)
<p>Coffee yields increased.</p> <p>Adaptive research in primary production increased.</p> <p>Research in product development and higher value waste alternatives increased.</p>	<p>Farm and parochial roads improved.</p> <p>Alternative pesticides & fertilisers sourced.</p> <p>Credit / micro-lending for growers made available.</p> <p>Stock of seedling increased.</p> <p>Praedial larceny eliminated.</p> <p>Crop insurance costs reduced.</p>	<p>New markets Accessed.</p> <p>Sector programme for increased brand promotion and market penetration developed.</p>

Client Perspective

TRADE INFORMATION	QUALITY AND STANDARDS MANAGEMENT	EXPORT BUSINESS EFFICIENCY AND EXPORT READINESS	FINANCE
<p>Data for decision making made available.</p>	<p>Quality Management Systems and Environmental Management Systems certification applied.</p>	<p>Competency training and counselling provided.</p> <p>Marketing competency of processors and roasters improved.</p>	<p>Affordable and accessible finance made available.</p> <p>PACKAGING</p> <p>Affordable quality export packaging made available locally.</p>

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.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT ENTITIES	TIMELINE
THE DEVELOPMENT PERSPECTIVE					
The coffee industry to minimise the negatives impact of growing practices on the environment	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 provide technical services for their implementation. Promote organic coffee farming. Develop National Industry Standards manual (for growers, dealers, processors and roasters) expanded to cover: <ul style="list-style-type: none"> technical manual related to production: from farm to cup. environmental standards. Health and safety standards. Social standards, such as employment, wage minimums/ farm gate prices, etc.. 	<ul style="list-style-type: none"> CIB Ministry of Agriculture JOAM NEPA 	Y1
Investment is attracted into the sector to enhance competitiveness and capacity	Percentage 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. 	<ul style="list-style-type: none"> CIB Min. Agriculture JTI 	Y1-3
Sector's economic contribution	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. Increase the provision of technical information and support to growers that is required to increase production yield. 	<ul style="list-style-type: none"> Ministry of Agriculture CIB 	Y1-3
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN:					
Sector Diversification					
The coffee sector increases domestic value addition	Number of value added product developed for commercialisation	2	<ul style="list-style-type: none"> Conduct 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). Promote and facilitate commercialising feasible products. 	<ul style="list-style-type: none"> SRC CEA CIB Ministry of Energy 	Y2

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Capacity development					
There is increased yield (output) resulting from improved practices and efficiencies	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 and size of seedlings. 	<ul style="list-style-type: none"> Ministry of Agriculture CIB 	Y1-3
The Jamaican Coffee Industry is recognised as the global industry standard	TBD	TBD	<ul style="list-style-type: none"> See initiative to Develop Industry Standards Manual for Objective 1 	<ul style="list-style-type: none"> CIB Ministry of Agriculture JOAM NEPA Ministry of Labour 	Y1-2
BORDER					
Cost of Doing Business					
There is improved infrastructure and business environment for growers and processors to enhance revenue	Percentage of farm roads targeted that are improved	50%	<ul style="list-style-type: none"> Advocate GoJ to improve farm and parochial roads. 		
			<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"> CIB CEA 	
			<ul style="list-style-type: none"> Advocate for increased availability of credit / micro-lending for growers to finance their production. 	<ul style="list-style-type: none"> CIB CEA 	
	Programme redesigned		<ul style="list-style-type: none"> Engage stakeholders in review and design of crop insurance programme. 	<ul style="list-style-type: none"> CIB CEA 	Y2
Crime					
	Percentage reduction in loss due to theft	50%	CROSS-CUTTING INDUSTRY INITIATIVES ARE RELEVANT	<ul style="list-style-type: none"> Ministry of Agriculture Ministry of National Security JCF 	Y1-3
BORDER-OUT					
The sector benefits from an improved branding and marketing programme	Percentage increase in export sales	20%	<ul style="list-style-type: none"> Design and implement a 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). 	<ul style="list-style-type: none"> CIB (R) JEA (R) JTI (R) CEA (A) 	Y1

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
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. 	<ul style="list-style-type: none"> • CIB • JEA • JTI • CEA 	Y1-2
Domestic – Tourism	Percentage 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 preparation & terminology. • Initiate training programme in hotel sector. 	<ul style="list-style-type: none"> • CIB • JEA • JTI • CEA 	Y1
THE CLIENT PERSPECTIVE					
Business Development and Export Competency			CROSS-CUTTING INDUSTRY INITIATIVES ARE RELEVANT		
Increased participation in exports in the sector, and improved export performance of enterprises	Percentage 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. 	<ul style="list-style-type: none"> • JTI • JEA 	
Quality Management					
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. • Collaborate with relevant entity(s) and lobby for funds for the 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. 	<ul style="list-style-type: none"> • CIB • Ministry of Agriculture • JOAM • NEPA • Ministry of Labour 	Y1
Trade Information			<ul style="list-style-type: none"> • Develop and disseminate market reports for the sector to provide firms with data for decision-making. 	<ul style="list-style-type: none"> • JTI • JEA 	
Other Trade Support Services			<ul style="list-style-type: none"> • Identify packaging and labelling expertise as a support service for the industry. 	<ul style="list-style-type: none"> • JTI • JEA 	
THE INSTITUTIONAL PERSPECTIVE					
			<ul style="list-style-type: none"> • Provide support for cluster development to facilitate collaboration among enterprises within the sector. 	JEA	
CIB diversifies and expands its revenue streams			<ul style="list-style-type: none"> • Strengthen agency network and relationships. • Lobby to modify the Cess order to include Imports of coffee. 	CIB	



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 English language training (ELT).

Objectives

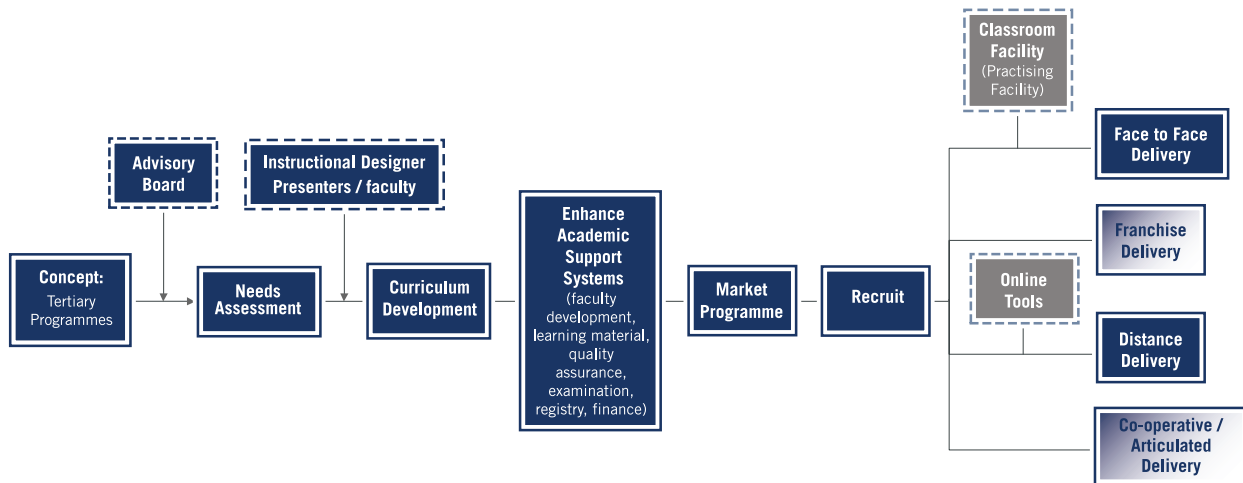
- Export earnings of over US\$30 million.
- 1,000 additional extra-regional students at tertiary institutions with differential fee structures per year. These institutions include UWI, Mico and NCU.

¹ 2007 figure not available.

² One export category recording significant growth, but which is not sustainable was scrap metal.

- 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.

Value Chain - Education



Current Value Chain Dynamics

- Quality programmes are not known in target markets
- Potential destination of choice in select areas of study
- inadequate housing to capitalise on export potential
- opportunity for greater coordination and collaboration among institutions

Future Value Chain Imperatives

- the destination is promoted for its quality education programmes and such a reputation is established.
- Programmes in identified priority areas are strengthened to facilitate expansion
- Housing opportunities are exploited to enable foreign students to take up study opportunities in Jamaica.
- there is increased collaboration among institutions to maximise their strengths and exploit global opportunities.

Key

	Current Value Chain Activity		Future Value Chain Activity (i.e. not currently being done)		International Value Chain Component
	Currently a component of the National Value Chain		To become a component of the National Value Chain		Gradient fill is part local and part international

SWOT Analysis

STRENGTHS

- 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).

WEAKNESSES

- 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 industry – as an attractive investment industry.

OPPORTUNITIES

- 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 sub-industry and real estate rental industry for foreign students.
- Linking programmes of study based on our unique factors.
- Recognition of quality professionals 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.

THREATS

- Limited funding from both public and private sources to facilitate growth and expansion of the industry.

STRATEGY AT A GLANCE

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.

TRANSACTION 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.

STANDARDS AND QUALITY MANAGEMENT

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

BUSINESS DEVELOPMENT AND EXPORT READINESS

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 industry including engagement of the Jamaica University Steering Committee development and promotion.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
THE DEVELOPMENT PERSPECTIVE					
To increase the levels of export-oriented investment in the sector	Number of FDI projects in the Education sector.	4	<ul style="list-style-type: none"> Develop Investment profiles and target investors for <ul style="list-style-type: none"> 3 foreign ELT providers. private medical training. criminology studies. Target investment for executing the Knowledge City concept. 	Lead: JTI Partners: • NCSI • JUSC • Ministry of Education	Y1-3
	Number of ELT students studying in Jamaica.	500			Y2
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN: (Value Chain Development)					
Improved range and quality of programmes that are offered by tertiary institutions	Number of additional regional students at tertiary institutions with homogenous fee structures per year.	1,000	<ul style="list-style-type: none"> Develop curricula for specialised areas that would appeal to international students for e.g. cultural studies. Promote ESL / ELT as an export opportunity for local institutions. 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. Review Dubai Knowledge City model among others to develop a best of breed model for Jamaica. 	<ul style="list-style-type: none"> Cluster Services Coalition JTI 	Y1
	Number of additional extra-regional students at tertiary institutions with differential fee structures per year.	1,000			
BORDER					
Crime					
To increase the number of foreign students in Jamaica	As above	as above	<ul style="list-style-type: none"> Advocate for instituting proposed interventions to address crime, and participate in initiatives where appropriate. 	<ul style="list-style-type: none"> Cluster Services Coalition 	Ongoing
Trade Facilitation					
To increase the number of foreign students in Jamaica	As above	as above	<ul style="list-style-type: none"> Examine the work permit regime and submit recommendations to make it comparable to that operated by the UK or other foreign study market selected as best model. Improve the student visa and work permit regime by streamlining visa application procedure for students and firms to facilitate work-study programmes. 	<ul style="list-style-type: none"> Ministry of National Security NCSI 	Y2

4 PRIORITY INDUSTRY STRATEGIES

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	TIMELINE
				ENTITIES	
Infrastructure					
To increase the number of foreign students in Jamaica	As above	as above	<ul style="list-style-type: none"> Develop student rentals programme for homeowners. Develop investment proposals for student housing. 	<ul style="list-style-type: none"> Ministry of Finance JTI Ministry of Housing NCSI JUSC TPDCo 	Y1 – 2 Y1
BORDER-OUT					
Sector Promotion					
Jamaica is perceived globally as a preferred education destination	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"> Cluster Services Coalition 	Y1
			<ul style="list-style-type: none"> Develop a 'Study in Jamaica' website. 	<ul style="list-style-type: none"> Cluster Services Coalition 	Y2
THE CLIENT PERSPECTIVE					
Client Focus					
Increased engagement in export activities	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. 	Lead: NCSI Partners: <ul style="list-style-type: none"> JUSC JTI UCJ 	Annual
Trade Promotion					
Same as sector promotion	Same as sector promotion	Same as sector promotion	<ul style="list-style-type: none"> Raise 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. Engage trade promotion service providers to include the sector in client targeting and servicing. 	<ul style="list-style-type: none"> NCSI Individual institutions Services Coalition JTI JEA 	Ongoing
THE INSTITUTIONAL PERSPECTIVE					
To strengthen the management structure for the sector's development and the level of networking and cooperation in the sector			<ul style="list-style-type: none"> Provide support to strengthen the Jamaica University Steering Committee Consortium. Foster increased institutional collaborations (such as UCC/UTEch MOU and articulation agreement between UCC-UWI). Collaboratively develop an inventory of programmes to be used as a strategic input for the sector. 	<ul style="list-style-type: none"> NCSI Services Coalition 	Y1-2



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 Industry contributes about 5.1% to the GDP of Jamaica, and accounts for 3.0% of all employment in Jamaica.

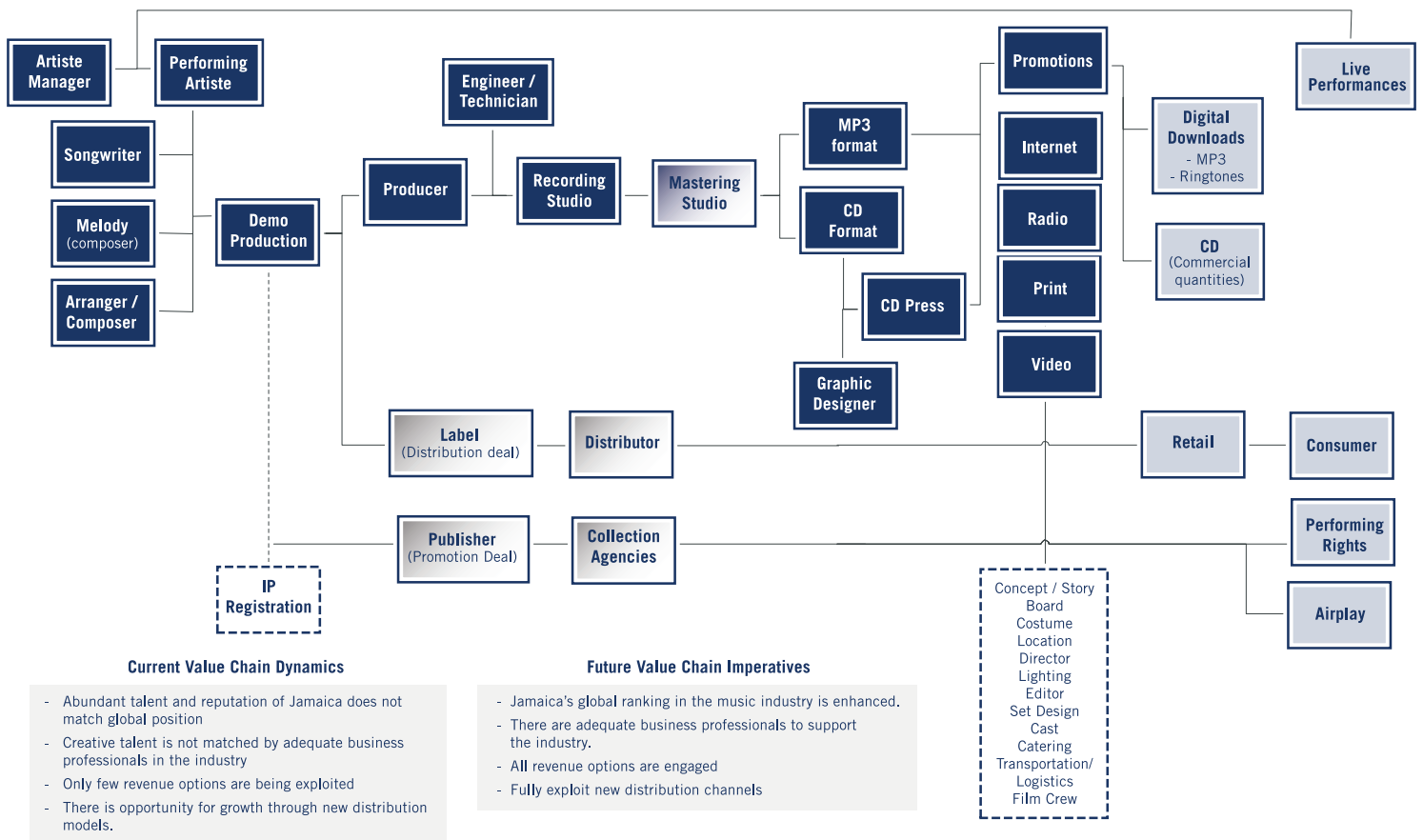
Within the Creative Industries, Dance, Drama, Film and Music are among the strongest export services and have the greatest potential to promote our culture and creativity. Various reports on the Music industry place the employment estimate between 6,000 and 15,000, with estimates of export earnings as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

Objectives

- To increase music exports by USD50million over five years.

- To increase exports across the industry by 20% annually.
- To strengthen the industry by focusing on the formalisation and development of enterprises.
- To enhance the institutions that support the industry to improve coordination and business approach to its development.

Value Chain - Music

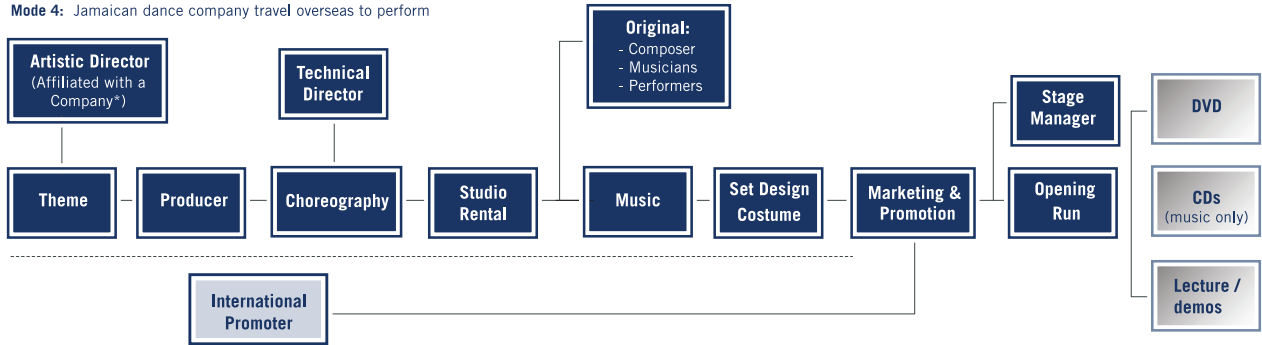


Key

- Current Value Chain Activity
- Future Value Chain Activity (i.e. not currently being done)
- International Value Chain Component
- Support and Related Activities
- Currently a component of the National Value Chain
- To become a component of the National Value Chain
- Gradient fill is part local and part international

Value Chain - Dance

Mode 2: Foreigners travel to Jamaica for performance
Mode 4: Jamaican dance company travel overseas to perform



Current Value Chain Dynamics

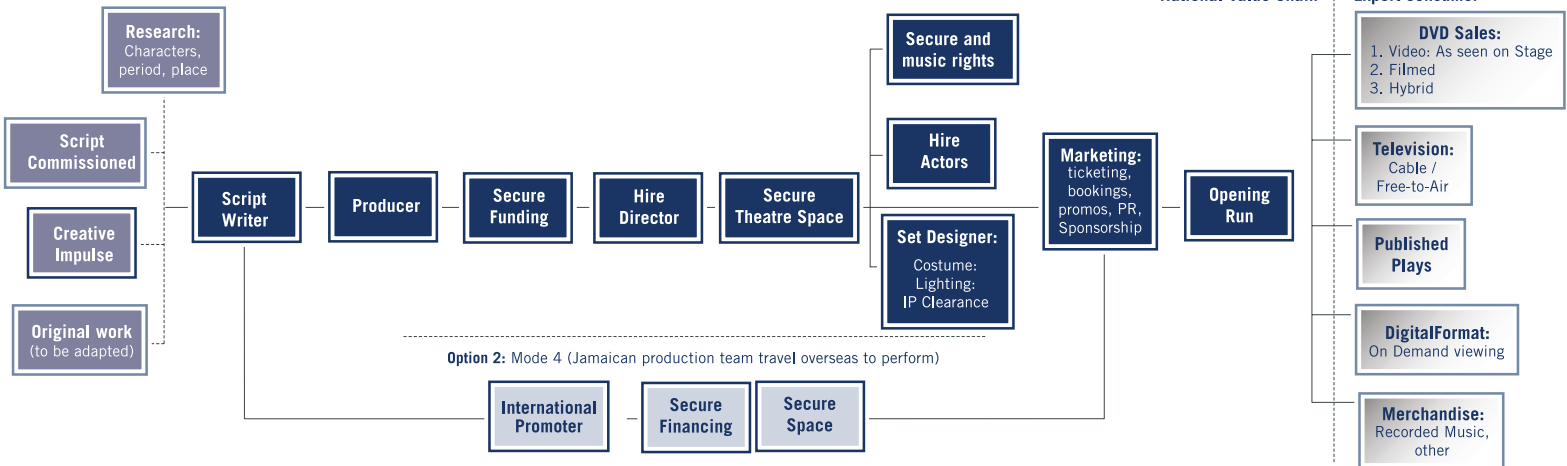
- Absence of a state-of-the-art studio limits extension to new value options, such as recordings, while also limiting live performances
- limited integration with the tourism industry

Future Value Chain Imperatives

- An adequate concert venue is constructed to facilitate new value propositions, such as recordings
- The industry benefits from the linkage to the Tourism industry

Value Chain - Drama

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



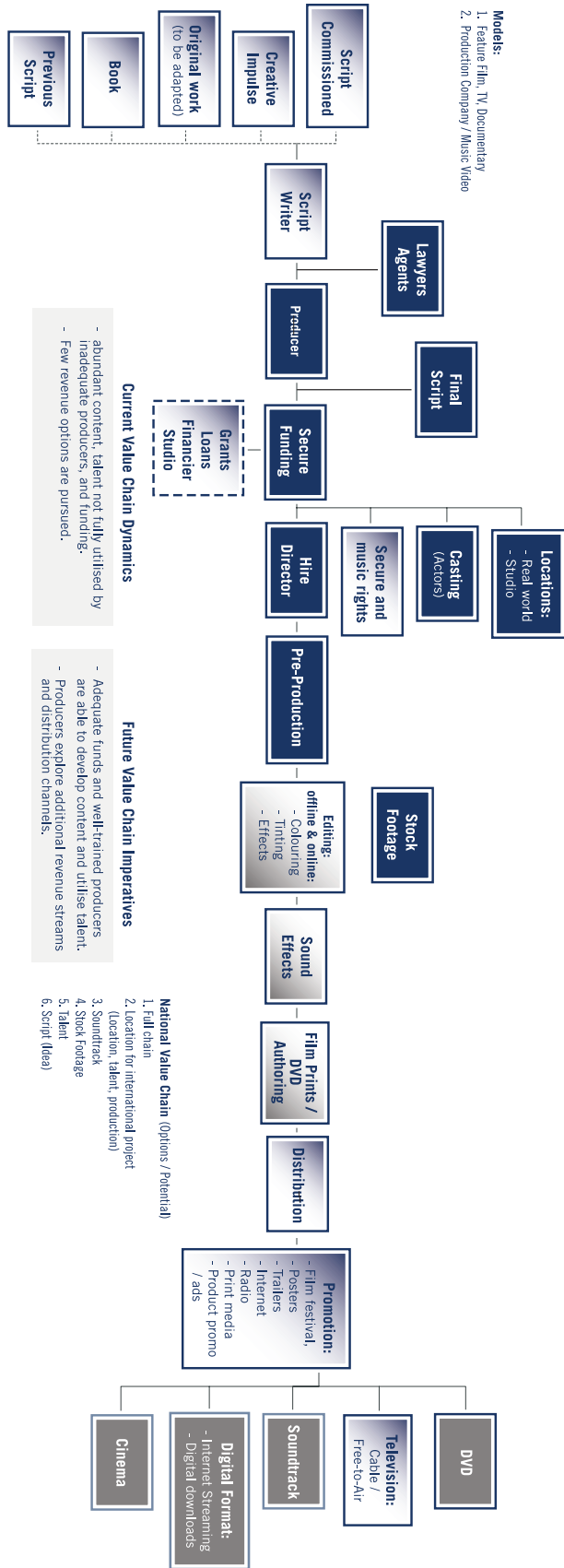
Current Value Chain Dynamics

- Inadequate theatre space and supporting infrastructure (lighting, etc) bottlenecks exploitation of talent and growth sector.
- Insufficient producers
- Under exploited linkages to the sub-sectors: music, fashion, tourism and film.
- Lack of value added and market differentiation
- Abundant talent not fully utilised.

Future Value Chain Imperatives

- Well-resourced physical infrastructure within 3 years which enables latent talent to emerge.
- Clearly defined market segments and well positioned value added products developed.
- Strong linkages to other sub-sectors established.
- Performing arts school offering comprehensive management courses.

Value Chain - Film



SWOT Analysis

STRENGTHS

- An abundance of talent in each of the sub-industries.
- Creative source.
- Abundant talent.
- World-class achievements.
- Varied and valuable cultural and heritage resources.
- Increased collaboration between tourism, cultural, entertainment and sports industries.
- Strength of “Brand Jamaica”.
- Modern copyright regime in place; Jamaica party to relevant IP agreements/international treaties.

WEAKNESSES

- Lack of appropriate and sufficient venues for the performance sub-industries.
- 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-industries the absence of a listing of qualified professionals for accessing/contracting them.
- Insufficient measurement and monitoring of industry.
- Insufficient capacity and financial support for institutions and infrastructure for culture and world-class entertainment industry.
- High levels of piracy.
- Insufficient regard and respect for the worth and economic value of creative industry professions and professionals.

- Limited capacity to enforce intellectual property rights.
- Insufficient knowledge of, support by and benefit by stakeholders of existing rights management systems.
- Insufficient business management capacity in creative industries.
- Inadequate institutional financing for creative ventures.
- Insufficient budgetary allocation for development of the industry.
- Inadequate human resource development for creative industries.
- Insufficient incentive for retention/holding earnings from creative industries in Jamaica.
- Gaps in existing rights management system.
- Inadequate linkages with other economic industries.
- Fragmentation, lack of coordination and duplication of roles among agencies.
- Inordinate delay in implementing some treaties through domestic law and reform of other relevant laws.

OPPORTUNITIES

- 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.

THREATS

- 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.
- 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 industry regarding business intricacies of creative industries.
- The negative implications of creative industries in the WTO trade regime.
- Impact of negative activities on the image of Jamaica.

STRATEGY AT A GLANCE

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 industries, 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.

TRANSACTION COST OF BUSINESS (BORDER)

A well developed and accepted IP framework in place.

Financial institutions perception of to the industry 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.

STANDARDS AND QUALITY MANAGEMENT

Culture of professionalism established and maintained.

BUSINESS DEVELOPMENT AND EXPORT READINESS

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 industry 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.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT ENTITIES	TIMELINE
THE DEVELOPMENT PERSPECTIVE					
The Creative Industries increases contribution to GDP	Percent contribution to GDP. Percentage increase in royalty fees collected.	Baseline to be determined	<ul style="list-style-type: none"> Improve mechanisms for collecting royalties: 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. Expand awareness and training to reduce IP violations in Jamaica. Integrate industry into national tourism linkage programme. 	<ul style="list-style-type: none"> JACAP MFAFT MCYS Cluster JIPO JTI 	Y1-2 Y1 Y1-2
	Number of new firms in the industry registering their businesses.	30	<ul style="list-style-type: none"> Provide assistance to entities to facilitate their formalisation: Business registration. tax and accounting systems. business planning and business advisory support. 	<ul style="list-style-type: none"> JBDC Cluster ORC BIPs 	Y1 (on-going)
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. 	<ul style="list-style-type: none"> JTI Cluster 	Y1
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN					
Capacity Development					
Enhance capacity exists <u>in Jamaica</u> to train the <u>relevant</u> personnel to <u>international standards</u> 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 creative and technical training institutions in Jamaica by introducing new locations, and enhancing their capacity. 	<ul style="list-style-type: none"> Cluster Education/ Training Institutions Services Coalition Ministry of Education 	Y1-3
	The number of registered training institutions and accredited programmes available to the entertainment sector.	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. 	<ul style="list-style-type: none"> Cluster Education/ Training Institutions Services Coalition Ministry of Education 	Y1-3

4 PRIORITY INDUSTRY STRATEGIES

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
	The number of qualified / certified professionals in the entertainment sector (to be further detailed).	Baselines to be refined based on audit.	<ul style="list-style-type: none"> Design and implement apprenticeship initiatives - especially in technical fields, such as mixing. 	<ul style="list-style-type: none"> Cluster Education/ Training³ Institutions Services Coalition 	Y1-3
			<ul style="list-style-type: none"> Obtain funding for initiatives aimed at community and cultural groups. 	<ul style="list-style-type: none"> MCYS Services Coalition 	Y1-2
In the industries	The number of qualified / certified professionals in the entertainment sector (to be further detailed).	Baselines to be re-fined based on audit.	<ul style="list-style-type: none"> Develop and execute (Music) engineers training and certification programme. Develop and execute (Film) Producer training programme. 	<ul style="list-style-type: none"> Cluster Institutions Services Coalition 	Y1
(Film) Increased creation of Good Jamaican-themed products based on our stories with international marketing potential	Number 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. 	<ul style="list-style-type: none"> Cluster Film Commission (JTI) TBD 	Y1-2
(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. 	<ul style="list-style-type: none"> Cluster Firms Services Coalition JTI 	Y1

³ Edna Manley College, HEART/NTA, CPTC

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	TIMELINE
				ENTITIES	
<p>Improved production skills exist to take quality of the Jamaican product to an international level</p> <p>Jamaica a self-sufficient production industry and also a self-production destination</p>	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. 	<ul style="list-style-type: none"> Cluster Firms 	Y1
BORDER					
Cost of Doing Business					
The costs of transactions and tools acquisition for the sector are reduced			<ul style="list-style-type: none"> Revise and update the Tools of the Trade Incentive. 	<ul style="list-style-type: none"> MCYS Cluster 	Y1
"Payola" practice is eliminated			<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. 	<ul style="list-style-type: none"> MCYS Clusters Services Coalition Ministry of Security Media Association Broadcast Commission 	
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 measures to protect those rights. Develop Business models for managing (and exploiting) IP rights and present models to firms through workshops and printed material. 	<ul style="list-style-type: none"> MCYS Cluster Services Coalition JIPO 	Y1

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	TIMELINE
				ENTITIES	
Infrastructure					
Jamaica has a multi-disciplinary state-of-the-art performing venue	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. 	<ul style="list-style-type: none"> MCYS JTI Cluster 	Y1
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. 	<ul style="list-style-type: none"> JTI Cluster 	Y1
Sector Promotion			<ul style="list-style-type: none"> Provide greater support for 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. 	<ul style="list-style-type: none"> JTI Cluster 	Y1-Y2
THE CLIENT PERSPECTIVE					
Business Development & Export Competency					
Improved business practices and higher levels of professionalism in the sector			<ul style="list-style-type: none"> Design and deliver workshops on professionalism and business etiquette in creative industries. 	<ul style="list-style-type: none"> Cluster 	Y1
Enhanced ability of cluster members to identify and take advantage of market opportunities domestically and internationally.	Number 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. 	<ul style="list-style-type: none"> Cluster Institutions Services Coalition Ministry of Education 	Ongoing
Financing			<ul style="list-style-type: none"> Upgrade Service providers 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. Create of an incubator fund for creative enterprises (micro-small enterprises). 	<ul style="list-style-type: none"> MCYS MIIC Min. Finance Cluster JTI JBDC CFB 	Y1 – 2 Y2

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Trade Information					
Firms are provided quality market information to facilitate market selection for events and related sales efforts			<ul style="list-style-type: none"> • Create and disseminate market specific reports that outline market size, potential and entry strategies based on channels. • 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). 	<ul style="list-style-type: none"> • JTI • EC/BIPs • Cluster 	Annual / Ongoing
Business Opportunities	<p>Number of value creation options that are commercialised.</p> <p>Number of firms undertaking value creation/ addition activities towards expansion.</p>	<p>5</p> <p>10</p>	<ul style="list-style-type: none"> • Document / package and disseminate business opportunities based on value creation possibilities in sector chains. • Develop mechanisms for networking within and across sub-sectors and sectors. 	<ul style="list-style-type: none"> • Clusters • JTI • JBDC 	Ongoing
THE INSTITUTIONAL PERSPECTIVE					
An effective national coordinating entity for the creative industries is developed			<ul style="list-style-type: none"> • Launch, empower and support an industry-wide policy framework and unit. 	<ul style="list-style-type: none"> • MCYS • Clusters • Services Coalition 	Y1
Royalties payment/ collection entities are strengthened.			<ul style="list-style-type: none"> • Provide technical support to the collections agencies to improve effectiveness and efficiencies. 	<ul style="list-style-type: none"> • Cluster • JACAP • JTI 	



Fashion, Jewellery and Accessories

Jamaica's fashion industry also captures the vibrant and bold energy of its people, and may be considered the strongest goods producing industry 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

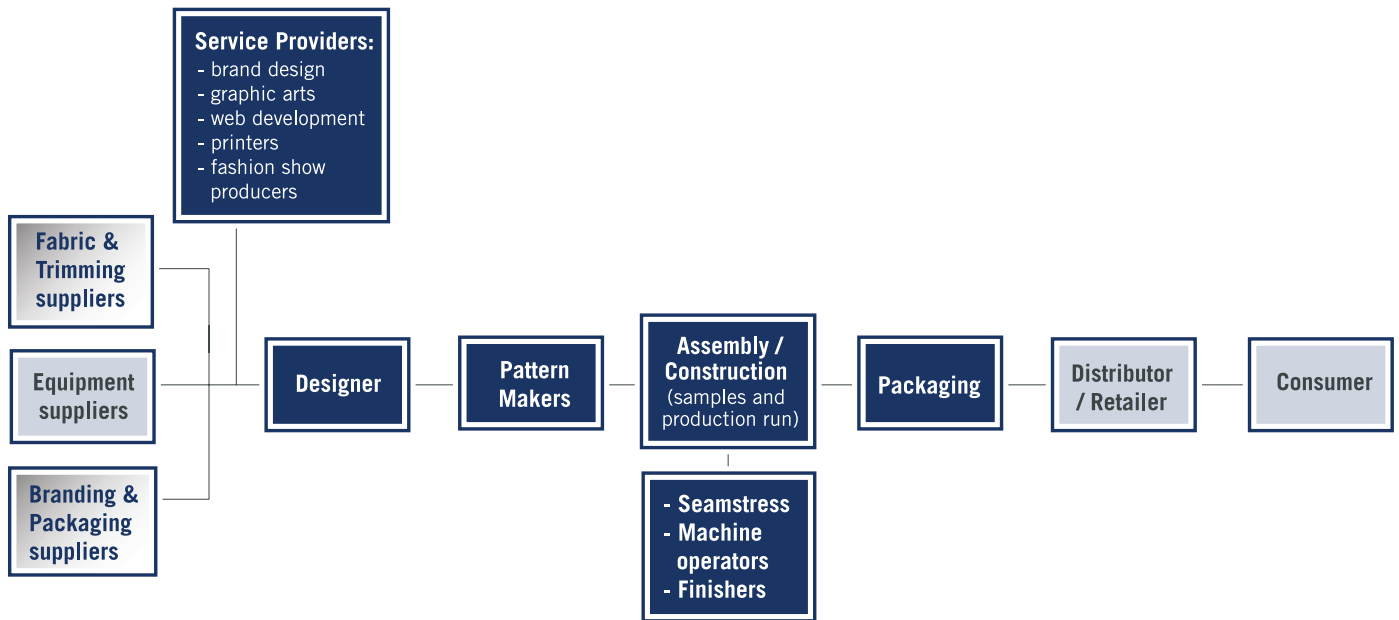
on economic or education level – who may not easily find (have access to) traditional employment opportunities.

Jamaica's total export figures for the apparel and jewellery industries 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. 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 industry 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.

Value Chain

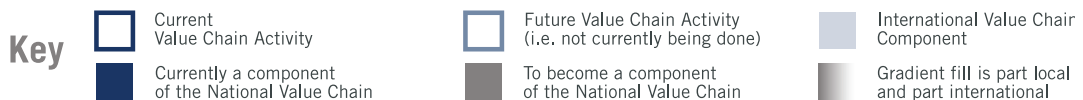


Current Value Chain Dynamics

- insufficient production capability for quality garments
- inconsistent supply of fabrics, notions and trimmings
- poor quality fabric available locally
- inadequately trained designers

Future Value Chain Imperatives

- adequate capacity for the production of quality finish garments
- consistent supply to quality fabrics, notions and trimmings locally
- well-trained designers that are knowledgeable in the business of the industry



SWOT Analysis

STRENGTHS

- 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).

WEAKNESSES

- New entrants lack the level of technical training previously available to persons who have 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 industry (particularly jewellery and accessories).

OPPORTUNITIES

- Jamaica may be 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 – e.g. merchandise for entertainment product.
- Increased sales to the tourism market.

THREATS

- 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.

STRATEGY AT A GLANCE

Vision

Jamaica is the Fashion Centre of the Caribbean.

Development Perspective

The Jamaican Fashion Industry 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.

Competitiveness Perspective

SUPPLY SIDE (BORDER-IN)	TRANSACTION COST OF BUSINESS (BORDER)	DEMAND SIDE (BORDER-OUT)
<p>Product quality improved and maintained.</p> <p>Manufacturing and business processes understood by designers.</p> <p>Quality and consistency in sourcing inputs improved.</p>	<p>Government incentives promoted among producers/ exporters.</p>	<p>Refer to Trade Promotion cross industry strategy.</p>

Client Perspective

TRADE INFORMATION	STANDARDS AND QUALITY MANAGEMENT	BUSINESS DEVELOPMENT AND EXPORT READINESS	FINANCE
<p>Market intelligence on prospective buyers provided.</p>	<p>Job and product standards developed to support quality culture.</p> <p>Innovation circles to generate new product ideas and designs are facilitated.</p>	<p>Management skills are developed and improved.</p> <p>Technical skills consistently and professionally applied by operational staff.</p>	<p>Start-up and microfunding is available for the industry.</p>

Institutional Perspective

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

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
THE DEVELOPMENT PERSPECTIVE					
Investment					
Increased availability to local designers of WISIC	Number of potential investment partners.	5 potential partners identified	<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. Promote and facilitate investment in the ginning and spinning of yarn for fabric production. 	<ul style="list-style-type: none"> JADF JTI MIIC Ministry of Agriculture 	Y1 Y1-2
Greater local retention of the value of WISIC based on expansion of the value chain	Percentage increase of production of WISIC.	20%	<ul style="list-style-type: none"> Promote and facilitate investment for WISIC growing and production. 		
Human Capital Development / Productivity					
Increased levels of productivity and quality in the industry	Increase in output from the sector.	Benchmark required	<ul style="list-style-type: none"> Establish job classifications and performance standards for the industry. Develop 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. 	<ul style="list-style-type: none"> Ministry of Labour Ministry of Education Cluster Productivity Centre Training institutions NES Secretariat 	Y1-2
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN					
Capacity Development					
Increased business support to designers for start-up and management	Number of firms accessing business support (back-office) services. Number of areas in which support is developed. Number of workshops held Number of workshop participants/beneficiaries.	Y1 - 25 Y2 – 50 3 support areas in Y1 3 additional areas in Y2 5 40 firms	<ul style="list-style-type: none"> Develop back-office support services for designers. Design and execute workshops in key business areas. Promote Enterprise Rating and Upgrading of firms to facilitate participation of all firms in the industry. 	<ul style="list-style-type: none"> JBDC Cluster 	Annual

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Improved production quality and output	Number of designers (a) linked to manufacturers or service providers, (b) establishing own operations, or (c) participating in a group/cluster manufacturing arrangement.	15 (total)	<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 and construction service providers on sensitivities to the industry in order to improve response and order fulfilment. Develop of a list of manufacturers and service providers that provide outsourcing services. Design and execute quality management and control training for manufacturers and service contractors. 	<ul style="list-style-type: none"> JBDC Cluster JMA JTI BSJ 	Y1 Y1 Y1 Y1-2
Improved production quality and output 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 of quality and consistency in 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. 	<ul style="list-style-type: none"> JBDC Cluster JMA JTI NES Secretariat 	Y1 Y1 (annual) Y1-2
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. 	<ul style="list-style-type: none"> JTI Cluster JBDC 	Y1
	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. 	<ul style="list-style-type: none"> JTI Cluster JBDC 	Ongoing
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. 	JMA JEA Cluster JTI	

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
Sector Promotion			<ul style="list-style-type: none"> • Increase support to designers to maximise results from participation in existing roster of promotional events: • Assist with marketing and sales collateral. • Sales workshops. • Contract “cluster” sales representative. 	<ul style="list-style-type: none"> • JTI • Cluster • JBDC 	Ongoing
THE CLIENT PERSPECTIVE					
Client Focus			<ul style="list-style-type: none"> • Develop a client classification system to group clients in the industry and design and deliver programmes geared to each category. 		
Business Development & 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 to drive further innovation by the firms. • Provide support to cluster development and strengthening. 	<ul style="list-style-type: none"> • Cluster • JBDC 	Semi-annual
THE INSTITUTIONAL PERSPECTIVE					
	Institutions reporting increased ability to service the industry.	2	<ul style="list-style-type: none"> • Assess work-plans 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). 	<ul style="list-style-type: none"> • All partners 	Y1-2
			<ul style="list-style-type: none"> • Engage all institutions within the sector to align programmes that are delivered. 	<ul style="list-style-type: none"> • All partners 	Y1
			<ul style="list-style-type: none"> • Seek resources for the sustainability of the Cluster. 	<ul style="list-style-type: none"> • Cluster • JBDC • NES Secretariat 	Y1-2



Information Communications and 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 industry 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 industry 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 industry in recent years comes from the data for investment and earnings in the industry. Foreign direct investment inflows to the

ICT industry has averaged US\$69 million per annum over the period 2001-2005, representing 11% of total foreign direct investment inflows over the period.

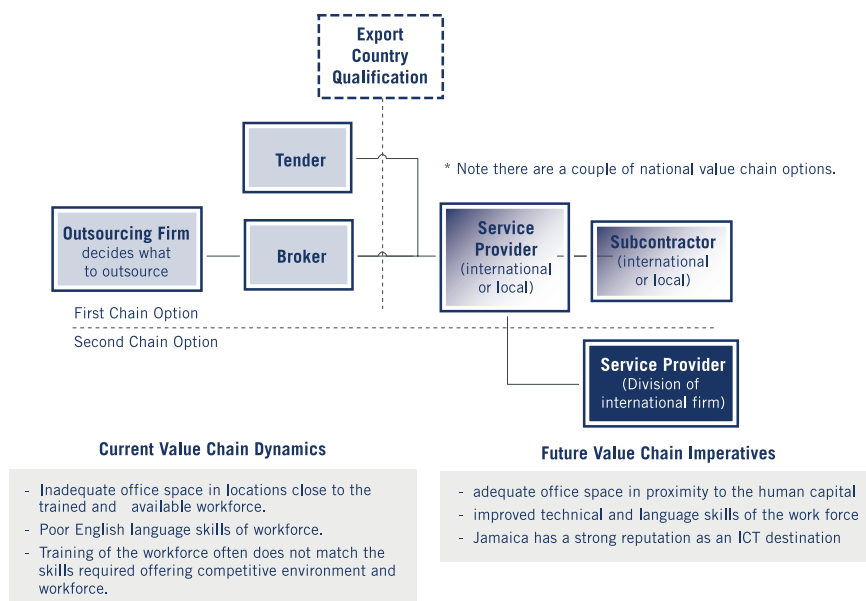
It is estimated by Jamaica Trade and Invest (JTI) that the ICT projects facilitated by JTI in the telecommunications and call centre industries employ over 14,000 persons.

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 industry 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.

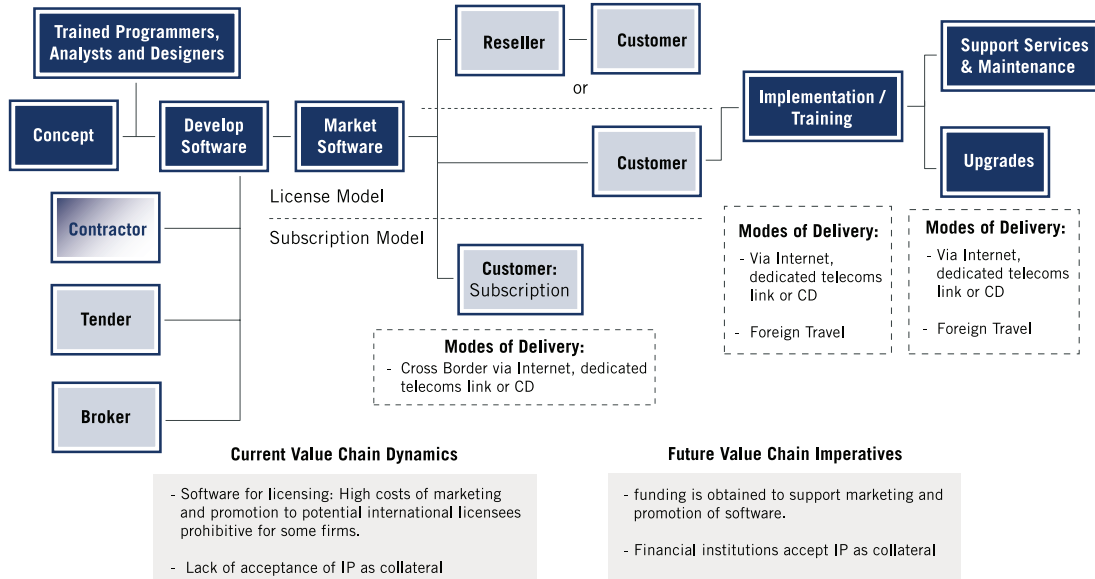
Value Chain / Business Model: Contact Centre / BPO



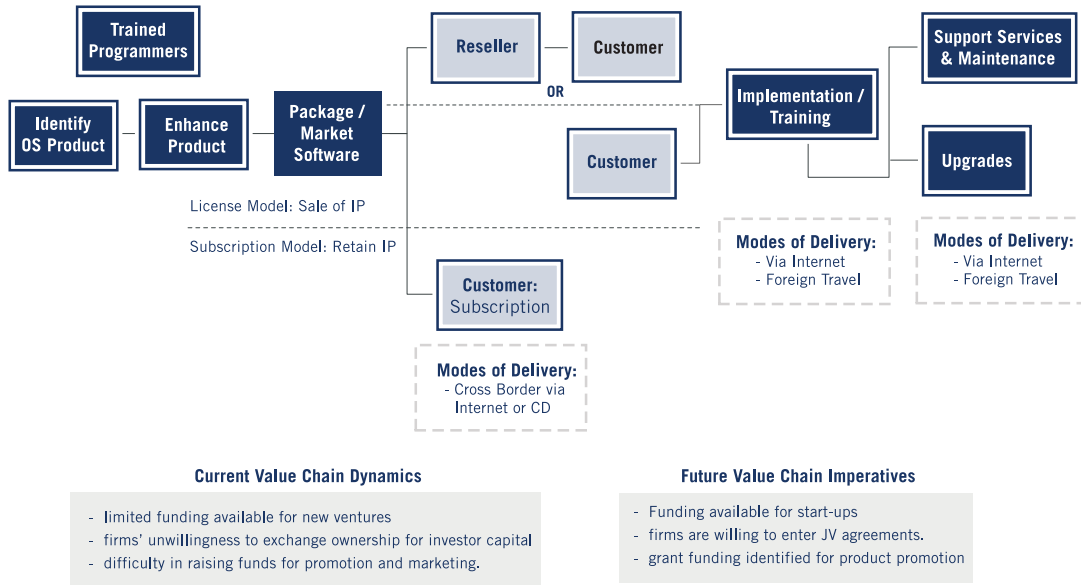
Key

	Current Value Chain Activity		Future Value Chain Activity (i.e. not currently being done)		International Value Chain Component		Support and Related Activities
	Currently a component of the National Value Chain		To become a component of the National Value Chain		Gradient fill is part local and part international		

Value Chain / Business Model: Software Development



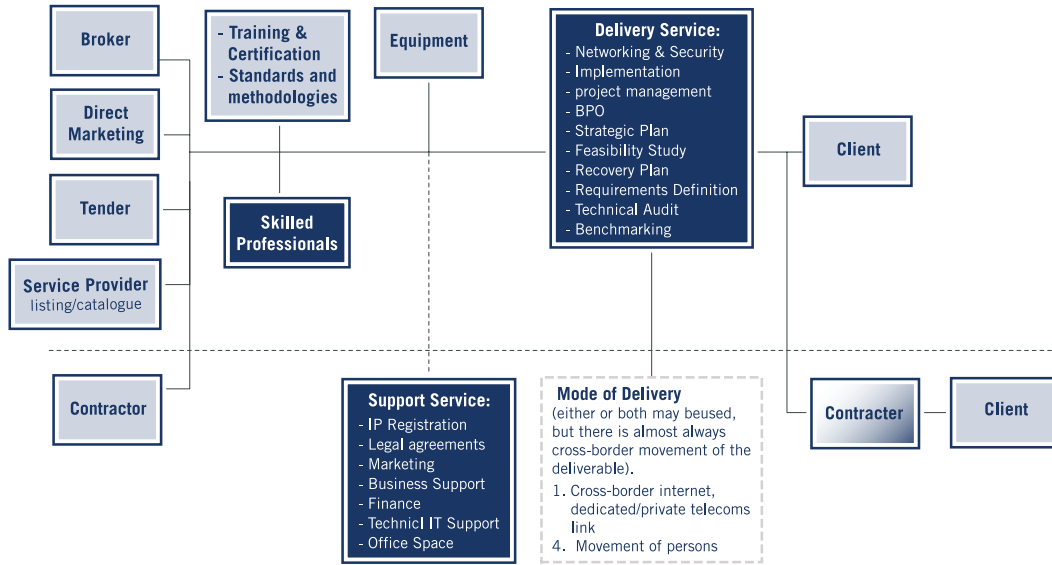
Value Chain / Business Model: Software Development (Open Source)



Key

- Current Value Chain Activity
- Currently a component of the National Value Chain
- Future Value Chain Activity (i.e. not currently being done)
- To become a component of the National Value Chain
- Gradient fill is part local and part international
- Required Resource

Value Chain / Business Model: ICT Services



Current Value Chain Dynamics

- Greater international marketing support required to identify opportunities and buyers
- Insufficient promotion of the sector in target markets to build the reputation of the country in this sector
- Identifying and tapping into channels for new and non-traditional markets
- Limited joint venture and no angel funding
- insufficient development funding for product development, standards compliance and marketing
- Adequate number of skilled persons

Future Value Chain Imperatives

- Sector is better served by the TSN, in particular for trade promotion
- A Joint Venture and Angel funding programme is established
- technical and grant support available for product development and standards compliance
- levels of skilled persons is maintained

SWOT Analysis

STRENGTHS

- Country reputation for creativity that may be stretched to the industry.
- Thoroughness of employees:
 - Creativity.
 - Design talent – especially software sector -
- Programmers.
- English as a first language.
- Time zone – same as main buyer markets (N. America) while complementing the partner/supplier markets (Asia & Europe).

WEAKNESSES

- Poor perception of Jamaica as a destination of quality products.
- Work ethic and attitude/discipline (generally, but is absent when the individual or team is challenged).
- Education system that is:
 - Producing insufficient programmers.
 - Some tertiary graduates are not job-ready.

OPPORTUNITIES

- Proximity to the USA for both English and Spanish projects.
- EPA partnerships.

THREATS

- Loss of skilled persons to overseas job market.
- Lack of affordable office space in key locations.

STRATEGY AT A GLANCE

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

SUPPLY SIDE (BORDER-IN)

Well-trained workforce available.
Institutional training and industry requirements matched.
Resources for protection of Intellectual Property in domestic and international markets available.

TRANSACTION COST OF BUSINESS (BORDER)

Office space in close proximity to human capital available.
Government incentives available to the sector.

DEMAND SIDE (BORDER-OUT)

Firms' compliance with market regulations increased.
Sector promotion increased.

Client Perspective

TRADE INFORMATION

Market Intelligence on IT trends provided.

QUALITY MANAGEMENT

Advisory and financial support provided for certification of firms and for testing and certification of products.

FINANCE

Angel and venture funding established and accessible.
Valuation model for IP as collateral established.

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.

4 PRIORITY INDUSTRY STRATEGIES

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
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 industry. 	<ul style="list-style-type: none"> JTI Sector Association 	Y1-3 Y1-3 Y1
Increase the size of the sector by building the domestic base of participants.	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). Engage industry professionals in the enhancement of the CXC curriculum . 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. Upgrade current BPO employees' skills. Provide opportunities to foster innovation and develop skills. 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. 	<ul style="list-style-type: none"> Sector Association JTI Ministry of Education 	Y1
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN: (Value Chain Development)					
The ICT sector has access to funding for start up and expansion.	Funds available through VC and Angel financing.	USD10 million.	<ul style="list-style-type: none"> Develop 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. 	<ul style="list-style-type: none"> JTI Sector Association 	Y1
	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. 	<ul style="list-style-type: none"> JTI Sector Association Services Coalition (Financial partner) 	Y2

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
	Number of firms listed on the Junior exchange.	3	<ul style="list-style-type: none"> Promote participation in the Junior Stock Exchange. 	<ul style="list-style-type: none"> JTI Sector Association Services Coalition JSE 	
	<p>Framework in place for IP to be accepted as collateral.</p> <p>Number of financial institutions that accept IP as collateral.</p>	2	<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. 	<ul style="list-style-type: none"> JTI Sector Association Services Coalition JIPO BOJ JBA Ministry of Finance 	Y1-Y2
			<ul style="list-style-type: none"> Seek to introduce Government Procurement guidelines to facilitate acquisition of local software. 	<ul style="list-style-type: none"> Min. Telecoms JTI Sector Association Services Coalition 	
BORDER					
Cost of Doing Business	Increase in the number of firms accessing incentives.	5 new firms	<ul style="list-style-type: none"> Promote relevant incentives. 	<ul style="list-style-type: none"> JTI Sector Association Services Coalition Ministry of Finance 	Y1
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. 	<ul style="list-style-type: none"> JTI Sector Association Services Coalition 	Y1

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	TIMELINE
				ENTITIES	
BORDER-OUT					
Sector Promotion			<ul style="list-style-type: none"> Diversify marketing approach to identify opportunities in Caribbean/ Latin America. 	<ul style="list-style-type: none"> JTI Sector Association Services Coalition 	Y1-2
THE CLIENT PERSPECTIVE					
Business Development & 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. 	<ul style="list-style-type: none"> Sector Association JTI Services Coalition 	Annual
Financing			See initiatives for (i) IP as collateral, (ii) VC and (iii) stock exchange.		
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. 		
THE INSTITUTIONAL PERSPECTIVE					
	Number of institutions increasing capabilities.	2	<ul style="list-style-type: none"> Increase capability to train designers, developers, programmers and analysts. 	<ul style="list-style-type: none"> UWI UTech Sector Association 	Y1-3
	Association created. Number 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"> Sector Association JTI Services Coalition Ministry 	Y1
			<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. 	<ul style="list-style-type: none"> Sector Association JTI Services Coalition 	Y1, Y3



Mining

Jamaica has a range of commercially exploitable minerals, including a wide variety of limestone, 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 industries, 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 GDP. The most important metallic mineral for the Jamaican mining and quarrying industry is bauxite, the ore from which alumina and aluminium are derived.

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

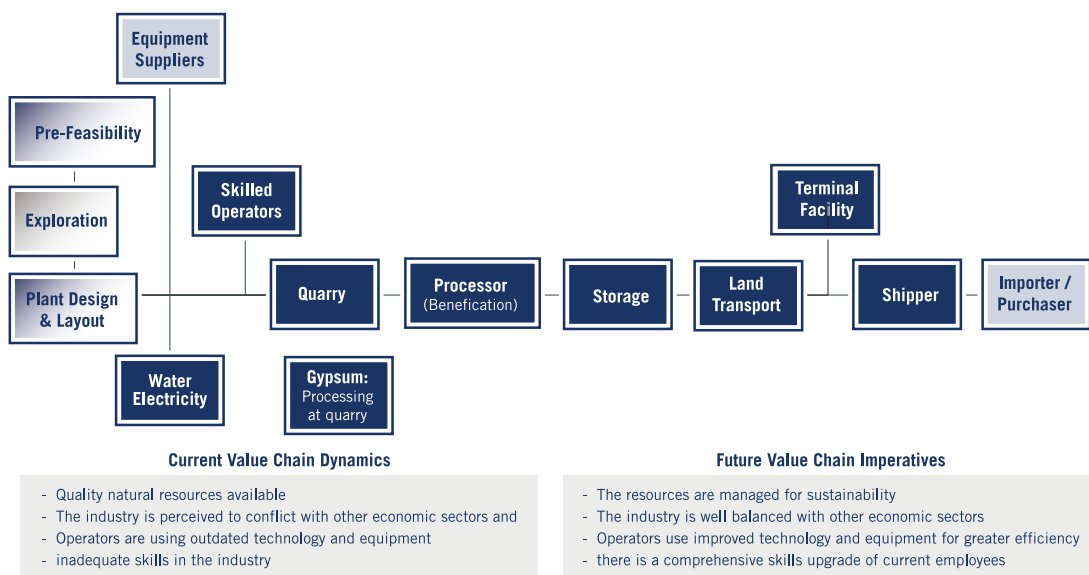
The industry also has the highest labour productivity in the Jamaican economy, due to its capital intensity and efficiency, advanced technology and the high quality of its human capital. It also has linkages with several industries including transport, urban and regional planning, agriculture, tourism,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

Obejctives

- An industry in which current investments are safeguarded, new investments are attracted and benefits are maximized in the interest of the national economy, local communities and the companies.

- An economically viable and globally competitive industry based on value-added products that contributes to sustainable national development and integrates the concept and principles of sustainable development in local and national decisions that affect the industry.
- Increased mineral exploitation, value-added products, increased consumption of local minerals and mineral products, exportation of minerals and mineral products, and the expansion and modernization of the Minerals Industry.
- The effective management of mineral resources and the Minerals Industry.
- A modern legislative framework and supporting institutions which enable continued development of the Minerals Industry.
- A strong and profitable industry.

Value Chain: Mining



SWOT Analysis

STRENGTHS

- 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-industry and the Industrial Minerals Industry.
- Growing businesses - Some companies have amassed a favourable amount of experience and financial resources which are being reinvested to facilitate further growth.

WEAKNESSES

General

- High level of dependence on the Bauxite Alumina Industry.
- 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.
- 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.

The Industrial Minerals Industry

- Under-capitalisation of operations.

OPPORTUNITIES

- 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 industry.
- 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 industry, 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.

- Expansion and diversification of the minerals industry - This involves an overall increase in the size of the industry, and diversifying into industries such as the Metallic Minerals Industry and the Industrial Minerals industry; Currently, the former

plays no role, while the latter plays only a marginal role in the industry.

THREATS

- Increased imports that can be locally produced based on liberalised industry.
- 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 Industry, and the frequency with which the ownership of major entities within the industry has changed particularly since the late 1990s.
- 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.
- More facilitatory government policies and a more engaging private industry in competing mineral producing countries such as the Dominican Republic, The Bahamas and Mexico, threaten growth potentials in Jamaica.
- Failure to present a consistent and organised public relation campaign promoting the industry.

STRATEGY AT A GLANCE

Vision

Jamaica is a world leader in the Minerals Industry, 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 Industry optimises its contribution to increased export earnings, job creation and community development through modernisation and improved efficiencies.

Competitiveness Perspective

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.

TRANSACTION 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 Perspective

TRADE INFORMATION

Market intelligence on prospective market and buyers provided.

STANDARDS AND QUALITY MANAGEMENT

Firms in the industry obtain international quality certification.

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

BUSINESS DEVELOPMENT AND EXPORT READINESS

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 industry development, and coordination of services provided by relevant technical entities.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT ENTITIES	TIMELINE
THE DEVELOPMENT PERSPECTIVE					
Environmental					
The Mining sector is coordinated and minimises negative impact on the natural environment.	Percentage 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, including the review for compliance to legal agreements. 	<ul style="list-style-type: none"> Mines & Geology/ Ministry DBJ 	Y1-2
THE COMPETITIVENESS PERSPECTIVE					
BORDER –IN: (Value Chain Development)					
To facilitate product diversification, increased levels of import substitution, improved product quality, optimised utilisation of mineral resources, and expansion of the industry.	<p>Increase range of products.</p> <p>Percentage of products that are value-added.</p> <p>Value of exports</p> <p>Ratio of export sales to production.</p>	Baseline to be provided.	<ul style="list-style-type: none"> Design and implementation of a modernisation programme for the industry. Provide technical support to access MOI, or write loan proposals to access funds. Provide training in quality management systems for all staff (quarry and processing). Train personnel on technical know how, financial and business management. Implement specialised industry professional courses (mgmt and supervisory mgmt levels). Provide assistance to get ISO certification funding. 	<ul style="list-style-type: none"> Ministry of Mining MIIC JTI Sector/ Cluster group University of Technology (Financial Institutions) HEART/ NTA UWI NEPA PIOJ MQAJ PAJ 	Y1 Annual
BORDER					
Infrastructure					
To increase exports.	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"> Develop a shared port policy to ensure access to key strategic ports for exports. Facilitate 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. 	<ul style="list-style-type: none"> Mines & Geology/ Ministry MIIC Ministry of Tourism JTI /JEA Port Authority of Jamaica 	Y1
BORDER-OUT					
Sector Promotion					
(export objective)	Export targets		<ul style="list-style-type: none"> Conduct opportunity awareness and matching initiative. 	JTI MQAJ	Annual

4 PRIORITY INDUSTRY STRATEGIES

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
THE CLIENT PERSPECTIVE					
Business & Export Competency					
To increase exports	Percentage of industry firms participating (current and potential exporters).	80% 15%)	<ul style="list-style-type: none"> • Provide export financial management skills training. • Develop a simple guide for contracting a marketing consultant to enter the export field - export readiness/venture guide for the sector. 	JEA JTI Mines & Geology Sector/ Cluster group	Y1 (possible annual renewal)
Quality Management					
	Percentage of industry firms certified.	30%	<ul style="list-style-type: none"> • Provide cost-effective certification and training programme in ISO 1400. 	Mines & Geology Sector/ Cluster group	Annual

5. Strategy Management

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 ‘hands-on’ manner as service-providers to the community of , potential and aspiring 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 a 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 3. Export Strategy Support Network

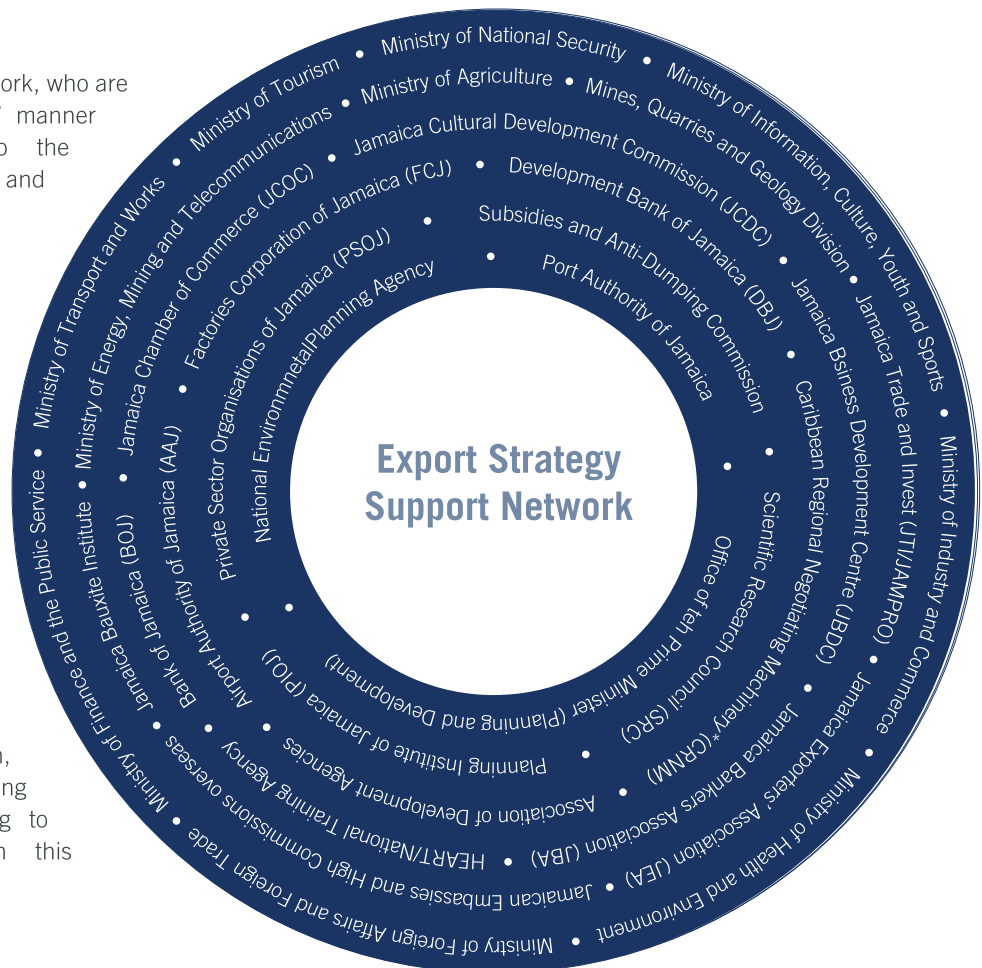


Figure 4. Service Delivery Network



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 transact 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

5 STRATEGY MANAGEMENT

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.

ACTION PLAN

OBJECTIVES	MEASURES	TARGETS	INITIATIVES	OWNER/SUPPORT	
				ENTITIES	TIMELINE
To establish the Jamaica Export Council that is governed by law and resource and effect its supporting secretariat for the effective implementation of the Export Strategy.			<ul style="list-style-type: none"> • Formalise the Export Council through legislation. • Formally institutionalise the Export Council. • Establish the NES Secretariat. • Conduct TSN audit. • Strengthen service delivery capability of TSN members. 	Lead: MIIC Partners: <ul style="list-style-type: none"> • OPM • JTI • JEA • PIOJ • Export Council 	
Private sector/cluster associations actively manage their respective strategies	Number of associations / formal groups established Number of associations / formal groups established	4 7	<ul style="list-style-type: none"> • Formalise cluster/industry support framework within the NES. • Formalise cluster/industry groups. • Establish the National (Jamaica) Coalition of Services Industries. 	Lead: Secretariat Partners: <ul style="list-style-type: none"> • JTI • JEA 	

Strategy Management and Monitoring

This Jamaica National 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:

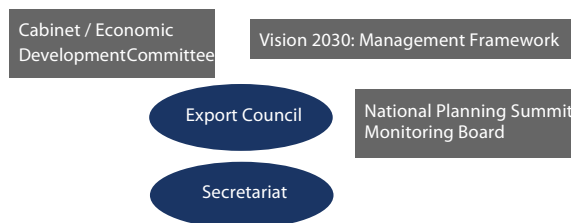
- Ensure that Jamaica has a current and relevant Export Strategy that is under implementation, by leading the process of the annual update of the strategy document.
- Conduct quarterly and annual assessments of the Export Strategy.
- Report (through its members) on the implementation of the initiatives 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 within JTI 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.

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 customised 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:

Primary Agencies

Jamaica Trade and Invest (JTI/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@jbdcc.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

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

Port Maria, St. Mary
T: +1(876) 994-9473
F: +1(876) 725-0865 C: +1(876) 824-5536
E: sgrant@exportjamaica.org

Port Antonio, Portland
T /F: +1(876) 715-5344
C: +1(876) 806-7220
E: gmclean@exportjamaica.org

Belfast

Morant Bay, St. Thomas

T /F: +1(876) 982-1842

E: zbenet@exportjamaica.org

Christiana Potato Growers Association

Christiana, Manchester

T: +1(876) 964-4279 and +1(876) 476-5317

E: sshakespeare@exportjamaica.org

St. Elizabeth Co-Op**Credit Union**

St. Elizabeth

T: +1(876) 966-3346 and +1(876) 493-8729

E: awhitely@exportjamaica.org

Negril Vendors Plaza

West End

P.O Box 3055

T: +1(876) 957-4067

F: +1(876) 957-4591

E: negriljambic@yahoo.com

Civic Centre

Great George Street

Savanna-la-mar, Westmoreland

T: +1(876) 918-1747

E: westccj@yahoo.com

4 Millers Drive

Lucea P.O.

Lucea, Hanover

T: +1(876) 956-9722

E: info@hanoverchamberofcommerce.com

Jamaica Trade and Invest (JTI/JAMPRO)

UGI Building

30 Market Street, 2nd Floor

Montego Bay, St. James

T: +1(876) 952-6045

F: +1(876) 952-2784

E: jambic.mobay@cwjamaica.com

Union Street

Montego Bay, St. James

T: +1(876) 952-6045

F: +1(876) 952-2784

E: jambic.mobay@cwjamaica.com

Trelawny Chamber of Commerce & Industry

Albert George Shopping Centre

Falmouth, Trelawny

T /F: +1(876) 485-7902

Abbreviations

ACP	African, Caribbean and Pacific group of states	FDI	Foreign Direct Investment
AFI	Approved Financial Institution	FX	Foreign Exchange
B	Border	GATS	General Agreement on Trade in Services
BASC	Business Anti-Smuggling Coalition	GATT	General Agreement on Tariffs and Trade
BCI	Business Competitiveness Index	GCI	Global Competitiveness Index
BI	Border-In	GCT	General Consumption Tax
BIPs	Business Information Points	GoJ	Government of Jamaica
BO	Border-Out	GDP	Gross Domestic Product
BoJ	Bank of Jamaica	HACCP	Hazard Analysis and Critical Control Points
BM	Blue Mountain	HEART/NTA	Human Employment and Resource Training / National Training Agency
BPO	Business Process Outsourcing	HS4	4 digit level Harmonised Code (Harmonised Commodity Description and Coding System)
BSJ	Bureau of Standards Jamaica	ICT	Information and Communication Technology
CABA	Caribbean Agri-Business Association	IDB	International Development Bank
CARIBCAN	Caribbean-Canada Trade Agreement	IFI	International Financial Institutions
CARICOM	Caribbean Community	IP	Intellectual Property
CARIFORUM	Caribbean Forum (CARICOM + Dominican Republic)	ISO	International Standards Organisation
CAPs	Community Access Points	IT	Information Technology
CBI	Caribbean Basin Initiative	ITC	International Trade Centre
CBTPA	Caribbean Basin Trade and Partnership Act	IUC	International University of the Caribbean
CEA	Coffee Exporters Association	JAMCO	Jamaica Marketing Company
CEDA	Caribbean Export Development Agency	JBA	Jamaica Bankers Association
CET	Common External Tariff	JACAP	Jamaica Association of Composers, Authors and Publishers Ltd.
CFB	Corporate Finance Brokerage	JADF	Jamaica Agricultural Development Foundation
CFW	Caribbean Fashion Week	JAPA	Jamaica Agro-Processors Association
CIB	Caribbean Industry Board of Jamaica	JAS	Jamaica Agricultural Society
CSME	Caribbean Single Market Economy	JBDC	Jamaica Business Development Corporation
CTPAT	Customs-Trade Partnership Against Terrorism	JCAA	Jamaica Civil Aviation Authority
CXC	Caribbean Examination Council	JCC	Jamaica Chamber of Council
DBJ	Development Bank of Jamaica	JCF	Jamaica Constabulary Force
EAMN	Export Access Monitoring Network	JEA	Jamaica Exporter's Association
ECs	Export Centres	JEC	Jamaica Export Council
ELT	English Language Teaching	JEF	Jamaica Employer's Federation
EMC	Edna Manley College	JIDC	Jamaica Industrial Development Corporation
EMS	Environmental Management Systems	JIPO	Jamaica Intellectual Property Office
EPA	Economic Partnership Agreement		
ERU	Enterprise Rating & Upgrading		
ESL	English as a Second Language		
ESSJ	Economic and Social Survey Jamaica		
EU	European Union		

JIS	Jamaica Information Service	PAJ	Port Authority of Jamaica
JMA	Jamaica Manufacturers' Association	PIOJ	Planning Institute of Jamaica
JOAM	Jamaica Organic Agricultural Movement	PPP	Public-Private Sector Partnership
JPS	Jamaica Public Service	PQ	Plant Quarantine, Ministry of Agriculture
JSDA	Jamaica Software Developers Association	PSDP	Private Sector Development Programme
JSE	Jamaica Stock Exchange	PSOJ	Private Sector Organisation of Jamaica
JTAT	Jamaica Trade Adjustment Team	PSOs	Private Sector Organisations
JTB	Jamaica Tourist Board	QMS	Quality Management Systems
JTI/JAMPRO	Jamaica Trade and Invest	RADA	Rural Agricultural Development Authority
JUSC	Jamaica Universities Steering Committee	REER	Real Effective Exchange Rate
MCYS	Minister of Culture, Youth and Sports	SAJ	Shipping Association of Jamaica
MDG	Millennium Development Goals	SBAJ	Small Business Association of Jamaica
MFAFT	Ministry of Foreign Affairs & Foreign Trade	S&T	Science and Technology
MGD	Mines and Geology Division	SMEs	Small & Medium Enterprises
MIAS	Mona Institute of Applied Sciences	SRC	Scientific Research Council
MIIC	Ministry of Industry Investment & Commerce	STATIN	Statistical Institute (of Jamaica)
MIF	Multilateral Investment Fund	SWOT	Strength Weakness Opportunity and Threat
MOI	Modernisation of Industry	R&D	Research and Development
MQAJ	Mining and Quarry Association of Jamaica	TA	Technical Assistance
MSME	Micro Small Medium Enterprise	TBA	To be determined
NBM	Non-Blue Mountain	TEU	Twenty-Foot Equivalent Unit
NCSI	National Coalition of Services Industries	TNC	Trans National Corporation
NCU	Northern Caribbean University	TPDCo	Tourist Product Development Company
NCT VET	National Council on Technical and Vocational Education and Training	TSN	Trade Support Network
NEPA	National Environment and Planning Agency	UCC	University College of the Caribbean
NES	National Export Strategy	UCJ	University Council of Jamaica
NGO	Non-Governmental Organisation	UNCTAD	United Nations Conference on Trade and Development
NIP	National Industrial Policy	UNODC	United Nations Office on Drugs and Crime
NQA	National Quality Awards	USD	United States Dollar
OECD	Organisation for Economic Co-operation and Development	US	United States of America
OIE	The World Organisation for Animal Health	UTech	University of Technology
OPM	Office of The Prime Minister	UWI	University of the West Indies
ORC	Office of the Registrar of Companies	VSD	Veterinary Services Division, Ministry of Agriculture
OUR	Office of Utilities Regulation	WIPO	World Intellectual Property Organisation
		WISIC	West Indies Sea Island Cotton
		WTO	World Trade Organisation
		VC	Value Chain