



***CARIBBEAN RIM INVESTMENT INITIATIVE
PLENARY MEETING
KINGSTON, JAMAICA
11 MARCH 2003***

Summary of Proceedings

On 11 March 2003 the Caribbean Rim Investment Initiative held its third Plenary meeting in Kingston Jamaica. The meeting was co-sponsored by the OECD, the Interamerican Development Bank and the Jamaica Promotions Corporation (JAMPRO). It brought together Ministers and high officials from thirteen countries of the region, OECD countries, senior business executives and international organisations.

The purpose of the Initiative is to encourage a favorable business environment in the region, to promote positive linkages between foreign investment and local enterprise development, and to support initiatives for national policy reform and regional cooperation. It is based on partnership between the countries of the region, OECD countries and participation of the private sector in efforts to improve the business climate. A key objective is to generate investment policy reform agendas among the countries of the region and to identify projects which can qualify for support by bilateral and international donors.

The meeting was a landmark of the initiative:

- It generated a successful government-business dialogue on investment opportunities and key features of the investment climate in the region;
- It demonstrated the effectiveness of peer reviews of three business environment reports (Costa Rica, Dominican Republic and Jamaica) which will be finalised shortly after the meeting;
- Significant progress was achieved in developing an investment reform agenda for these three countries;

- It prepared the launching of the next series of business environment assessments for a number of countries; and
- Identified projects for regional cooperation including the improvement of data collection and impact assessment of FDI as well as capacity building for financial markets and services.

A detailed account of the discussions and a list of participants are attached.

**CARIBBEAN RIM INVESTMENT INITIATIVE
PLENARY MEETING
MINUTES**

11 March 2003
Kingston, Jamaica

The meeting was held at the Jamaica Conference Centre. Introductory speeches were given by Patricia Francis, President of JAMPRO and Rainer Geiger, Deputy Director, Financial, Fiscal and Enterprise Affairs, OECD.

I. MINISTERIAL ROUND TABLE

- Paul Robertson, Minister of Development, highlighted key regional issues and Jamaica's priorities and actions:
 - The Caribbean region needs to improve competitiveness and respond quickly to international investor needs if it is to be successful in attracting new investment.
 - With world FDI declining Jamaica has not experienced any drop in investment.
 - The Jamaican government created the Office of Development within the Cabinet to achieve the priority goal of facilitating business.
 - Their focal point includes investment, competitiveness and job creation.
 - The government is undertaking a modernization plan for the governmental agencies, within the frame of a World Bank project. It involves the Office of the Registrar, Customs, JAMPRO, and others.
 - USAID is also supporting a project to improve the business environment.
 - In order to intensify the process of improving the environment for local and foreign investors, a more fluent communication with the Ministries of Education, Health, the Customs and others is crucial.
- He also listed the challenges Jamaica faces:
 - Finding the appropriate policies and intervention to improve the investment climate.
 - Introducing some fundamental changes the private sector needs, mainly concerning their business processes and their role in research and development issues.
 - The need for co-ordination between education and business.
- Rainer Geiger from OECD stated the objectives and philosophy of the CRII Program:
 - The aim is to increase FDI as well as local investment, taking into consideration the competitive advantages each country has. The concern is not just the quantity but the quality of investment.
 - Development comprises both quality and sustainability.
 - Regional cooperation helps policy reform.
 - Many studies have been carried out in the region. The CRII intends to build on existing efforts to avoid duplication.

- There are 3 stages to be considered:
 - (1) **Business Environment Reports** (BERs). Conceived as dynamic frames to identify opportunities and risks. They are primarily a tool for the countries to write their own reform agenda and to identify projects.
 - (2) **Reform Agenda** to be prepared by national organisations and to chart the way from analysis to action. These should have 'critical time bound targets' for key reforms and identify projects for action. The Kingston meeting is considered as a turning point here with emphasis now shifting to the reform agenda. The *process* is to an extent more useful, with its emphasis on CRII country 'ownership' and regional experience sharing, than the *product* itself.
 - (3) **Projects for implementation** i.e. specific projects that will underpin and drive the reform agenda and which may be undertaken with partnership from IDB, UNCTAD and other international institutions.
 - **The way forward.** New BERs are envisaged for the Netherlands Antilles, Trinidad and Tobago and Belize. Some OECS countries have expressed their interest in being part of the program. A Steering Group Meeting will be held in late May or early June 2003 in Washington to complete the reform agendas and to finalise identification of projects for support.
- Minister Gaston Brown from Antigua and Barbuda mentioned the following:
 - The CRII initiative addresses important issues for the countries of the region.
 - There is currently a "redirection" of investment inflows to large countries - many CRII countries have seen FDI halve.
 - OECS countries have structural problems concerning size, human resources, financial resources and natural resources. This raises the question whether there is a necessity for special treatment.
 - They need to attract FDI to foster economic development.
 - Antigua and Barbuda want to undertake a BER.
 - The action plan should seek to build a more efficient and responsive economy.
 - The two main needs now are technical capacity building and technology.
- Former Prime Minister Don Martina from the Netherlands Antilles stated that it is important for them to be part of a regional project. He indicated the progress achieved since the OECD mission last November.
 - The Minister had instructed them to obtain public and private participation - to get the commitment of local governments (5) and the private sector.
 - A number of different government agencies and private sector groups have expressed their commitment to the project and each has a clear task to accomplish.
 - He welcomed the opportunity for the Netherlands Antilles to participate in the CRII with other Caribbean counterparts and to strengthen regional cooperation.
- Undersecretary Hugo Rivera from the Dominican Republic commented that the BER contains useful information. He underlined a number of investment-related issues from his country's perspective.

- During the 90's the Dominican Republic went through a privatisation process that included the sugar cane and the electricity industries. The privatisation of numerous enterprises contributed to attracting more FDI. The telecom sector also played an important role in attracting FDI.
- The country is undergoing a review of the incentives it provides to free-trade zones (FTZs).
- Patricia Francis, Jamaica commented that Dominican Republic was a 'star performer' on FDI in the region. She found the DR/OECD report interesting and useful in seeing how Jamaica might fine-tune points. The CRII gives them the opportunity to share experience and link regionally.
- Silvia Constain from Colombia addressed the following issues:
 - From the Colombian perspective, the investment policy reform agenda gives them the opportunity to think more about investment policies. The challenge they face differs from other countries. The agenda should be consistent with the National Development Plan, which the government already has for the 2002 - 2006 period.
 - There are enough studies on issues - what they need is the implementation focus and result-driven orientation of the CRII. The CRII can give a push in implementing policies, provide expertise that they can call on, move from paper to action - these features and the partnership of all CRII participants are most important features of CRII for them.
 - Colombia participates in an UNCTAD study with a focus on investment policies.
 - The most important macroeconomic problem is the country's huge fiscal deficit.
 - There are four reform areas identified by the government: labour, pension, taxation, and institutions.
 - A number of important initiatives were mentioned:
 - Arbitration is not adequate in Colombia and the Colombian Congress is in the process of adopting a law to improve the situation. Colombian courts can take between 10 and 20 years to make a decision.
 - Personal and legal security are essential topics the government is working on.
 - Double Taxation Treaties.
 - The government is also working on issues such as venture capital.
 - The CRII Program will provide an impetus for some of the initiatives the government has already identified.
 - The CRII will also help to drive the reform agenda into action.
 - Linkage was one area where they were not sure how to move forward and this will need to be addressed
- Minister Robertson commented and added some aspects he did not include in his first remarks.
 - Linkage is also low (16%) in Jamaica - they want improvement here.
 - FDI inflows in Jamaica do not always generate employment or enough added value.
 - Subsidies and incentives are now restricted by the WTO.

- Thus there are significant challenges through the CRII process.
- Andre Kabbon from the Capital & Credit Merchant Bank urged to build projects that make sense for the Jamaican community abroad so that they could invest in Jamaica.
- Answering a question from Patricia Francis, Paul Comenencia, the Netherlands Antilles (NA) Chamber of Commerce representative, referred to business opportunities between the NA and the other Caribbean Rim countries.
 - The need for coordinating efforts in order to ensure that a good infrastructure is available so as to attract more cruise ships from the United States. Same comments regarding port facilities.
- A representative of Grace Kennedy, a Jamaican company, referred to the difficulties his company had experienced in trying to export to the Dominican Republic, particularly related to non-tariff barriers, company and product registration and all the requirements that must be met. The DR's undersecretary explained that he was not aware of such difficulties and offered his ministry's help to clarify the situation.
- Maxine Mac Lure, CEO of Life of Jamaica underlined a number of challenges for the region:
 - The existence of inconsistent regulations.
 - Registration processes which are very difficult and need harmonization.
 - A regional Stock Exchange (SE) would be beneficial, avoiding different regulations for numerous Stock Exchanges.
 - Work permits are difficult to get in other countries other than Jamaica.
- Haydn Gittens from RBTT Bank Jamaica Ltd. provided more elements from the financial standpoint.
 - The need for a strong regulatory network.
 - The challenge to rearrange the bureaucracy.
- Paul Comenencia agreed with the Regional Stock Exchange proposal, whereas Maxine Mac Lure asked what currency to use at the SE, and in which country the SE would be located.
- The Jamaica Cluster Competitiveness Project's representative shared his views.
 - **Companies** are the ones who compete, not countries or regions - there is a need to work with clusters of companies.
 - The firms will make the region competitive.
 - The firms, particularly the small- and medium-sized (SMEs), look to the government for guidance. They should be encouraged to be in touch with their customers through surveys or other means.
- The Jamaica Manufacturers Association made clear that all actors and sectors are necessary to "win", including the government and the CARICOM. Reducing crime in the nation was considered vital, and so was the removal of barriers so as to make the trade agreements a reality.
- Richard Downer from Price Waterhouse gave a list of elements the investors pay attention to.
 - Investors look for markets, skills, legal framework, incentives, human resources and natural resources. There is a need to benchmark where we are and work on measurable improvements.
 - It is the government's responsibility to develop good legal frameworks.

- It takes a long-term plan to improve skills.
- Bob Stevens from the Port Authority of Jamaica pointed out the following:
 - The region has a major interest in attracting cruise ships visitors, albeit there is a growing competition from the Far East.
 - A good strategy should include selling products and services to visitors from cruise ships. Locals should be trained to take advantage of the job creation, which would lead to an increase in remittances to the region (remittances are currently diverted to the Philippines and other Asian countries).
- Gaston Brown called for a joint taxation strategy.
- Patricia Francis made a few concluding remarks underlining that the region knows what its problems are and understands the need to take action.

II. THE INVESTMENT CLIMATE

- Patricia Francis made a presentation based on Jamaica's vision regarding FDI.
 - FDI accounted for a total of USD 613.9 million in 2001 and there was a 13.5% FDI increase between 1990 and 2000. Tourism, ICT, chemicals/minerals, manufacturing, film and music are core sectors.
 - The following sectors will continue to be targeted as part of the government's investment promotion strategy: general manufacturing, minerals and agribusiness, telecoms, and tourism. The government also aims at increasing reinvestment rates; converting money transfers into productive investment; and engaging overseas productively.
 - Numerous opportunities have been identified,
 - ICT. Call centres, back-office and software development services.
 - Tourism. European focus in diversifying markets. Eco, heritage and wellness tourism. Local expansions through timeshare.
 - Non-services sector. Aquaculture, fresh produce, recycling, plastics, minerals/chemicals, food processing.
 - The expectations from investment include job creation, export diversification, technology transfer, access to developed distribution channels, and increased productivity.
 - The challenges include crime, high production costs, labour market reform and high transaction costs (red-tape).
 - In order to strengthen the framework for investment it is necessary to improve the regulatory framework, adopt internationally-accepted incentive regimes, and improve infrastructure services.
 - Getting involved in CRII means having a credible partner, improving the investment promotion capacity, and enhancing linkages between local and FDI. The expected outcome is to facilitate employment, wealth creation, and growth.
 - JAMPRO has prepared an inventory of legal barriers to investment, with the help of the Norman Manley Law School, and a draft investment reform agenda aimed at improving the investment environment for FDI and local investment and ensuring growth from these flows.
 - Some immediate measures include,
 - Improved communications with investors.

- A new business approval tracking system.
 - The centralization of statutory payments.
 - A revised health permits system.
 - For the medium term, the reform agenda foresees the following planned actions,
 - Review of tax regulations to identify inefficiencies in statutes and procedures.
 - Review of the Work Permit Procedures Aliens Act to facilitate greater access for key personnel related to investment projects.
 - Reviewing legislation to improve transparency in the Fishery Industries Act and the Aquaculture Act -automatic licensing investigations for fishery quotas-
 - Removal of the Industrial Incentives Act from statutes.
 - Removal of monopoly market structure from the Cement Industry Control Act (1948).
 - Review of Export Industry Encouragement Act to remove export link to incentives.
 - Review Jamaica Export Free Zone Act to assess removal of TRIMs and prohibited subsidies.
 - Review administrative procedures in trademark registration to improve efficiency.
 - Establish clear criteria for granting electricity licenses.
 - Subsidy programs are expected to be eliminated by year 2007. This means reviewing incentive packages for investors and the creation of an SME clearinghouse for them to operate as suppliers of companies operating in free zones.
 - The steps already taken include a crime/security plan, the customs modernization, an IADB e-government project, a tax environment modernization project, the CRII and the World Bank's PSMP.
 - As for next steps, working with investor focus groups is envisaged, liaising with CARICOM to address regional issues and developing a National Export Plan with ITC are ahead.
- Maryse Robert from OAS commented on Jamaica's vision and its BER.
 - Jamaica's vision is very clear.
 - There is a list of initiatives.
 - The country moves forward with the liberalization of the telecom sector since March, 2003.
 - There are a series of modernization plans and actions (including public sector and customs modernization.)
 - There are measures in place to fill the gap with infrastructure issues, including with respect to sewage facilities and transport.
 - Jamaica is involved in three negotiations-CARICOM, the Free Trade Area of the Americas (FTAA), and the DOHA Development Agenda-all with the same deadline of January 1, 2005.
 - Some questions remain unanswered. Will CARICOM discriminate between CARICOM and other investors post-2005? In the apparel and textiles sector,

what type of rule of origin does Jamaica wish to negotiate? In services, what access to other markets does Jamaica want?

- Concerning the tax treatment of investment, Clive Nicholas, Director General of the Tax Administration Directorate, explained the following:
 - A major tax reform took place in 1990. The government broadened the tax base, and all taxpayers were registered. The Tax Authority is located in one building with one integrated computer system.
 - There is a project for on-line filing of returns and there is a pilot project to pay duties on-line.

- Maryse Robert presented the main results of the Dominican Republic's BER.
 - The DR has had a 6% GDP yearly increase and over a billion USD FDI over the 90s.
 - The country experienced growth in the 70s and severe BOP problems in the 80s. Reforms have been undertaken in the 90s.
 - In 1995 a Foreign Investment Law abolished most barriers to investment and a tax reform took place during 2000 and 2001.
 - The monetary and financial codes guarantee currency and interest rates driven by market forces.
 - FTZs attracted investments in the apparel industry due to tax incentives and low labour costs.
 - The investments in the services sector (electricity, telecom and tourism) produced high economic growth.
 - The foreign investors' perception is positive. There is a state of the art telecom system, openness to FDI and political and economic stability.
 - The negative perceptions are related to high costs of electricity and the shortage of skilled workers and supervisors among others.
 - The Dominican Republic's Investment Policy Agenda includes the following,
 - A Land Ownership Modernization Program that will simplify the registry process, provide training to civil servants and acquire new scanning devices to ensure a secure filing system.
 - A one-stop-shop mechanism for the Environmental Authorization System. This will include a less costly, transparent and secure single registry.
 - An Investment Related Residence Permit Program. This initiative will simplify paperwork for shareholders and employees related to FDI, reducing the process to a maximum of 45 days.
 - A modernization and reform program for the customs. This comprises improving the government's control, training courses for custom's officers, technology upgrading, procedures simplification and the inclusion of the private sector in a foreseen Customs Superior Council.

- Hugo Rivera added some comments:
 - The FTZs regime can be in place until 2009.
 - The DR has received new investment from Spain, the US and Canada among the developed countries and from Guatemala, El Salvador and Mexico in the sugar cane, tourism and cement industries respectively.

- There is a project that aims at reducing the electricity cost through the use of natural-compressed gas.
- Michael Mortimore from ECLAC shared his views.
 - Until recently the main focus was on quantity of FDI, mainly related to BOP matters. Today there is a focus on quality and the development potential of FDI.
 - Five or 10 years ago the strategy used to be just liberalization of FDI. Today the need is for a more focused and targeted investment policy, which means not passive but more active policies. Agencies are interested in concrete contributions of FDI, such as knowledge and technology transfer.
 - The main challenge of the Dominican Republic is that 60% of its exports are generated by six items from FTZs.
- Declan Murphy from the OECD presented the main results of the BER on Costa Rica.
 - Costa Rica (CR) is a small economy, which has successfully increased and diversified its exports. It stands as a model of success for many countries to learn from and to understand issues that are key to competitiveness
 - It has demonstrated its clear ability to attract investment inflows. From 1994 to 1999 the country experienced a 10-fold increase in FDI. This is particularly impressive taking into account the new products (many with more added value than traditional products) that are now made in the country, such as microchips and medical devices.
 - FDI inflows in Costa Rica not only have significantly grown during the last decade, but have also had a positive qualitative impact in the process of economic development in the country.
 - Costa Rica's success is based in the first instance on political stability, strong and transparent institutions, strong rule of law and a long-term investment in education which shaped a productive, flexible and educated workforce. It is interesting to note that the bulk of FDI today is in the services sector, which relies on human skills.
 - FDI has meant not only increased foreign exchange, but also jobs in relatively higher paid sectors and a significant transfer of technology.
 - CR has also been assertive in penetrating world markets.
 - CR has put an emphasis in greenfield investments in contrast to many other developing countries that initially pursued privatisation.
 - The legal system imposes no discrimination measures on FDI.
 - The CR case should be compared with other successful stories around the world. Slovenia increased its FDI from USD 176 million to 2.5 billion in a period of 2 or 3 years. Attracting FDI is competitive. Quantity and quality are important.
 - Yet there has been a limited spill-over and linkage effect in the region and in CR. 'Rooting' existing investment through expansion of business functions undertaken in CR (for example, procurement, product enhancement and R&D, manufacturing, marketing, logistics/distribution, financial management and

administration, customer service and aftercare, etc.) and increasing linkage with domestic sub-suppliers, service providers, etc., are key challenges for the future.

- Concerning other challenges, the pace of economic reforms has been slower as compared with other Latin American countries, particularly in the services sector, where key areas still remain in the hands of State monopolies.
- The report demonstrates the Costa Rican investment policy should focus on at least three main goals, promoting the modernization of the country's infrastructure, continuing to improve the education of its human capital and fostering backward linkages between FDI and domestic micro and small enterprises.
- Public works are urgently needed to increase the competitiveness of the productive sectors and to facilitate the attraction of investment and new technology. Due to budget constraints, adjudication mechanisms should be identified in the short-run.
- The report recognizes the significant development accomplished by Costa Rica in the field of education. However it is also true the country will have to reassess the role of education in a changing world economy. English proficiency and computer literacy are two urgently needed elements.
- Irene Arguedas from CINDE-Costa Rica explained her agency is a private organisation that does not change with the different governments. She elaborated on the CR strategy and the future focus on key target sectors. CINDE see the CRII process as support to developing that strategy and to obtaining better partnership from relevant authorities. They are aware of many challenges including competition from other countries need to address this.
- She also provided a general perspective of her institution as compared with other agencies in the region.
 - CINDE, the Costa Rican Investment Board, promotes investment in the country. It is a private, apolitical, non-profit organisation founded in 1982 and declared of public interest by the government in 1984.
 - CINDE's mission is the *attraction of foreign direct investment in specific sectors*. Three of them benefit from significant strengths and advantages, Medical Devices, Electronics, and Services. A fourth one, so-called *Special Projects*, includes initiatives in areas such as textiles, tourism, and others.
 - The work in each sector is supported by promotion executives and specialized researchers, who analyse specific market segments and tendencies, identify sub sectors of interest, study and generate relevant information and lists of potential investors.
 - Costa Rica assigns the utmost importance to the influx of foreign investment as a significant contributor to the generation of employment, technology transfer and diversification of exports.
 - As a rule, foreigners have exactly the same rights as locals for conducting business in Costa Rica. Companies and individuals can establish operations in almost every industry without limitations. The possibility of creating strategic

alliances between foreign and local companies is only limited to identifying the right market opportunity and the right local partner.

- CINDE has offices in New York, California and Costa Rica.

III. REGIONAL CO-OPERATION

This session was chaired by Evelyn Wayne, Caricom Secretariat

- Gerd Jarchow, Head of Delegation of the European Commission in Jamaica pointed out the following.
 - FDI is now recognized as one of the key factors in economic growth and wealth.
 - FDI is particularly important for developing countries. It does not create debt obligations and it represents long-term commitment and lasting assets.
 - Fairness and non-discrimination are basic conditions for host countries to open their economies to FDI. A better enabling environment for business and investment can prove more attractive than incentives.
 - The European Union supports the launch of negotiations intended to set up a coherent basic framework of multilateral rules on FDI as part of the next round of WTO multilateral trade negotiations.
 - Regional co-operation plays an important role. The negotiation of an Economic Partnership Agreement with the Caribbean offers the opportunity to improve conditions for commerce and investment.
 - The European Union will support the regional economic integration process in the Caribbean particularly the establishment of the Caribbean Single Market and Economy (CSME).
 - CSME will be the decisive mechanism to facilitate the achievement of sustained economic development, international competitiveness, coordinated economic and foreign policies, functional co-operation and enhanced trade and economic relations with other countries.
 - Free movement of capital is essential in the CSME. Protocol II of the CSME Agreement removes restrictions on capital movements within CSME and prohibits CARICOM Member States from introducing any new restrictions.
 - Successful regional integration requires the commitment of a strong and dynamic private sector. The private sector must be more directly involved in regional policy making. This entails institutional strengthening of regional private sector organizations.
 - There is a need to revitalize these associations. The establishment of regional private sector associations in newly emerging sectors (IT, financial sector, etc.) should be supported.
- Mr. Jarchow concluded the liberalization and harmonization efforts achieved under the CSME can provide the region with a stronger bargaining position in external negotiations and facilitate the adjustment needed in implementing the requirements of external trade and investment agreements. CSME can give support to the private sector through institutional strengthening, entrepreneurship development and appropriate frameworks for investment incentives.

- Mr. Friedrich von Kirchbach from the International Trade Centre, UNCTAD/WTO underlined the importance of intra-regional investment and trade promotion.
 - Intra-regional business cooperation in the Caribbean Rim remains comparatively low although the experience in other regions suggests that similarity in demand patterns creates significant opportunities for intra-regional trade and investment.
 - Successful attraction of investment and participation in trade requires rapid moves towards the knowledge economy at all levels.
 - This encompasses better provision on international economic data by Caribbean countries and more active utilization of market analysis tools available for international business promotion and development.
 - In this context, the emerging collaboration between JAMPRO and ITC may be of particular interest.

In their concluding remarks, Rainer Geiger and Patricia Francis highlighted that capacity building, linkage and data collection are key issues that should be addressed in the future. The process was now moving from analysis to implementation. The reports should be finalised taking into account comments and advice given. A guidance note on the reform agenda will be prepared and new assessments will commence in Netherlands Antilles, Trinidad and Tobago and Belize. In April a mission will take place to NA; in June 2003 a meeting is envisaged at IDB Headquarters in Washington DC to finalise the reform agenda, for Costa Rica, Dominican Republic and Jamaica and to identify follow-up projects.

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