Final Report

PREPARED BY:
Presidential Commission on Competitiveness —
Groupe de Travail Sur La Competitivite (GC)

WITH THE FACILITATION OF:
OTF Group

NOVEMBER 2009
Shared Vision for an Inclusive and Prosperous Haiti
Final Report

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LIST OF ABBREVIATIONS

GC  Groupe de Travail sur la Competitivite
OTF Group  on the Frontier Group
BDS  Business Development Services
SMEs  Small- and Medium-sized enterprises
DSNCRP  Growth and Poverty Reduction Strategy Document
GDP  Gross Domestic Product
SVP  Shared Vision Process/Project
PPP  Public-Private Partnership
PROSPER  PROgramme Strategique pour l'Economie et la Richesse
BPO  Business Process Outsourcing

DEFINITION OF KEY TERMS

Competitive Advantage: A firm possesses a sustainable competitive advantage when its value-creating processes and position have not been able to be duplicated or imitated by other firms.

Comparative Advantage: The ability of a person or a country to produce a particular good or service at a lower marginal cost and opportunity cost than another person or country.

Cluster: A geographic concentration of interconnected businesses, suppliers, and associated institutions in a particular field.

Market Segment: A group of people or organizations sharing one or more characteristics that cause them to have similar product and/or service needs.

Niche: The subset of the market on which a specific product is focusing on.

Competitiveness: Productivity, meaning the efficiency with which natural, financial and human resources are deployed.

Small & Medium Sized Enterprises (SMEs): In Haiti, firms with between 10 and 250 employees.

Productivity: Metrics and measures of output from production processes, per unit of input.

Strategy: A set of integrated choices designed to achieve a specific objective.

Mental Models: An explanation of someone's thought process for how something works in the real world.

Collier Report: Paper authored by Dr. Paul Collier in January 2009 with a targeted set of recommendations to drive economic growth in Haiti.

Quick Wins: Short-term Activities designed to improve the performance of the general business enabling environment or specific sectors.

Business Process Outsourcing (BPO): The contracting of the operations and responsibilities of a specific business functions (or processes) to a third-party service provider.
Executive Summary

In 1804, Haiti did the unthinkable by becoming the only nation where slaves won their independence. Despite this exciting history, Haiti has suffered enormously in recent decades. However, since the last democratic elections in 2006, Haiti has achieved improved security and political stability. The most pressing issues now are the creation of prosperity and the development of a shared vision for Haiti.

Ongoing political crisis has slowed the development of the nation. GDP per capita of Haiti has halved since 1981 from US $800 to $400, expressed in constant 2000 US dollars. To achieve sustainable economic growth and prosperity for all citizens, Haiti must break the “Survival Cycle” in which it is trapped. A key component of escaping this survival cycle is to reduce Haiti’s dependence on foreign aid which perpetuates the current state of economic stagnation.

A consensus exists on the importance of competitiveness in the creation of economic prosperity. Michael Porter of Harvard defines competitiveness as productivity. The standard of living of a nation depends on the income earned by the majority of its inhabitants and this income is determined by their productivity and their ability to create products and services consumed by domestic and foreign customers. In this sense, Haiti is a nation suffering from a serious lack of competitiveness, lack of exploitation of its potential to create cost-effective products and, consequently, unemployment and endemic poverty.

84% of respondents in the national survey of attitudes believe that a shared national vision is essential for the development of Haiti. The President has mandated the Working Group on Competitiveness (GC) to articulate this vision. With the support of OTF Group, the GC is working to facilitate a Shared Vision Process (SVP) for which this document is the draft report.
This document is intended as a platform for debate on the way forward, not the final answer to the problems facing Haiti. The work of the GC is based on five important principles:

- Peace, security and stability, macro-economic environment, and incentives for production are essential to prosperity.
- The Haitian people need jobs and opportunities in both rural and urban areas.
- Haiti is a largely agricultural nation with a large rural population that must be integrated into the national and global economies.
- The government has a critical role in supporting private initiative.
- The shared vision for Haiti must be accepted by all and implemented jointly.

Although concerned with a sustainable economy, Haitians are in need of immediate results. The GC has translated these aspirations into a three pronged vision. First, the creation of 500,000 jobs in 3 years through a portfolio of five growth clusters. Second, these jobs will be created throughout the nation especially in the rural areas and in the SME and micro-enterprise sectors. Finally, an enlarged definition of the private sector as the engine of growth and the government as the facilitator of private sector investment and innovation is required.

After a detailed analysis of 42 potential clusters, fruit & tubers, animal husbandry, tourism, garments, and Business Process Outsourcing (BPO) have emerged as the clusters with the greatest potential to lead the growth of the Haitian economy. The portfolio balances the imperatives of job creation in the short-term with a structural transformation of the Haitian economy over the long-term. Cross-cutting clusters support the priority clusters include: construction, finance, information technology and
communication, training & education, and the business enabling environment.

Haiti is full of plans, strategies and reports, but limited action. Success in competitiveness requires acting and thinking differently. Two types of constraints to effective implementation of a competitiveness strategy in Haiti are emerging. The first is attitudes: a survey of 752 Haitian leaders on this subject reveals a lack of trust in Haitian society. This mistrust and skepticism vis-à-vis the private sector and lack of understanding of competitiveness must be addressed. The GC will use a process that will promote ownership over this vision.

The second is constraints to business growth. The private sector views corruption, crime, infrastructure and access to capital as the main constraints to their success. 63% of SMEs and micro-enterprises say they have seen their profits fall over the past three years. Although willing to get help, these companies noted a lack of professional support services. Haiti must become an economy dedicated to supporting entrepreneurship through Business Development Services (BDS).

To change the current situation, Haiti and all Haitians must take a new approach to economic development. Specifically, Haiti must take this opportunity to initiate the transformation of its economy. To realize this opportunity, the GC recommends that the nation rebuild itself through three pillars: 1) create a culture of entrepreneurship, 2) the implementation of public-private partnership and quick-wins including actions support SMEs, and 3) the articulation and implementation of cluster strategies to build great Haitian products and services.

Competitiveness is a marathon. Effective implementation of these strategies will require collaboration between the government, private sector and civil society. The framework for the
implementation of the Shared Vision is called the Programme Stratégique pour l’Economie et la Richesse (PROSPER), a medium-term initiative (1 year pilot phase, plus 2 year optional renewal period) designed to manage the three pillars above. To lead PROSPER, the GC proposes the establishment of a permanent framework through a National Competitiveness Council which will bring together all segments of society. This group will play an important role in increasing the level of trust between the public and private sectors.

Prosperity is a choice. The means to transform the Haitian economy is in the hands of Haitian leaders, not the international community or foreign advisors. The nation must move quickly from discussion to action to fully exploit the opportunities available to the country. If Haitian leaders work together and focus their efforts on sectors and constraints targeted in this report, the Haitian people will finally benefit from the dividends of stability and achieve the vision of a prosperous and competitive Haiti.
1. Haiti—Unrealized Potential

The history of Haiti provides a unique framework to better understand the current situation. In 1804, Haiti did the unthinkable by becoming the only nation where slaves won their independence. During the two centuries that followed, Haiti failed to transform this political independence into economic freedom for the majority of Haitians. With real GDP per capita halved during the last 20 years, natural disasters, the food riots of 2008, and the apparently infinite flow of international aid and assistance, the Haitian crisis is apparent to any observer.
INDIVIDUAL SURVIVAL IN A PREDATORY ECONOMIC ENVIRONMENT
Since independence, the goal of Haitian citizen was to seek freedom and survival. Since the war of independence, Haitians have decided to live free or die. This led Haitians to reject any form of authority. Taken in this light, the Haiti has been successful because most people could live freely and survive. The economic crisis of the past twenty to thirty years challenged the assumptions of the Haitian mentality, placing Haiti increasingly in a situation of dependence on the international community.
1960 2015
Since the establishment of the colony of St. Domingue in 1492, the economic model of Haiti has not benefited the masses. First settlers, then the ruling class exploited the economy in order to maximize their profits by neglecting the poor. Haiti did not really change its business model after independence with the new elites replacing the colonialists by concentrating wealth and perpetuating an economic model of income disparity. [Figure 1]
GDP per capita was $405 in 2006 with a drop of nearly 50% from 1981 levels. During the second half of the century, economic progress has been elusive for Haiti. Figure 1 shows stagnation in the level of prosperity of the average Haitian and is generally one of the main causes of social tension. The economic history of Haiti suggests that the DSNCRP growth targets are ambitious.

NUMEROUS OBSTACLES CONSTRAIN HAITI'S COMPETITIVENESS.
Determinants of Competitiveness—The Competitive Diamond In view of the broad principles underlying the competitive advantage, Haiti needs to create an environment that will support and encourage businesses to achieve and maintain their competitive advantage. The fruit of research by Professor Michael Porter of Harvard Business School, summarized in his book, The Competitive Advantage of Nations, has identified five factors that constitute a system he calls the ‘competitive diamond of national advantage’.
Five interrelated factors influence competitiveness. Industry structure, demand conditions, factor conditions, related industries and government support. Taken together these five factors are the competitive diamond. The following chart illustrates the competitive diamond.
Demand: Haiti has a vast potential market. With 10 million inhabitants, but low purchasing power Haiti’s market offers opportunities especially with the substitution of imports. Regionally, Caricom is another opportunity for Haiti as the Dominican Republic. Finally, HOPE II provides preferential access to the U.S. market on which Haiti must capitalize as soon as possible.
Factors: Haiti has not yet been able to transform comparative advantage into competitive advantage. Haiti’s population is under-utilized; education is out of step with the needs of society. High migration rates mean that 80% of university graduates have left the country, leaving the country with a dearth of qualified human resources who are capable of producing superior quality products and services.
Haiti’s private sector has made significant investments and progress to modernize the country’s port infrastructure, bringing the time to export containers of priority products down to just a few days in most cases. Despite this excellent performance, there are three areas where the process could be improved:
- Image building: the World Bank’s Doing Business rankings put Haiti’s time to import and export containers at among the worst in the region. Based on interviews with large importers and exporters, the figures cited for time for export (35 days) and import (33 days), do not reflect the reality of the situation.
Document handling costs of $350 are also not in line with the reality. This misperception could be addressed through strategic engagement of the Doing Business team by Haiti’s leadership.

- Customs: although the port itself runs efficiently, private operators believe that there is significant room to improve the performance and efficiency of customs procedures.

- Cost: for export, costs are generally competitive with the region, but would be lowered with increased volume. For imports, costs are significantly higher than average because of inbound port fees (wharfage) that are not applied to exports and to imported raw material used in the manufacturing of exports.

Competitiveness requires a coherent policy framework for support; currently, some of economic policies are brakes on the Haitian economy. An illustration is the case of monetary policy. It is important to note that the real exchange rate has appreciated significantly over the past five years, reducing the competitiveness of many industries including exports and agricultural production. This lack of consistency has often penalized the Haitian economy. It is necessary that there is a real coherence between economic policy and the national objectives of the country.

The judicial system is one of the main barriers to the economy. During discussions with members of civil society, they indicated that the weakness of the judicial system has important consequences on competitiveness. Haiti has created laws unsuited to its location, making their implementation difficult. In the Doing Business 2008 ranking of the World Bank, the country is 164th of 182 countries as ranked in terms of protecting the rights of investors. [Figure 2]

FIVE PATTERNS OF PARALYSIS

The volume of reports and analysis on how Haiti could and should develop its economy is staggering. Based on the existence of these plans and strategies, the key issue seems to be the apparent inability of key economic actors to implement recommendations that are based on solid analysis and insight. Based on our preliminary analysis and consultations with stakeholders, five patterns that lead to this paralysis emerge.

Consensus building that slows decision making & implementation. Despite the importance of consensus, absolute consensus building can slow implementation of strategies and plans. As in many other countries, this phenomenon is present in Haiti. To advance beyond this trap, it will be important to encourage a culture of compromise on acceptable consensus, not perfect consensus. It is also critical to promote a culture of action and results.

Deep mistrust among various actors. Over the past 200 years, a culture of deep mistrust and enmity has been created between the elite and the masses, government and the private sector in Haiti and the respective roles of each party in fostering economic growth. This mistrust played out repeatedly in our conversations with the respective parties where the government accusing the private sector of being only interested only in personal gain to the detriment of the country, while the private sector expressing deep doubts in the government’s willingness and ability to do its part to improve the business environment. Similar conversations played out with the government taking the side of the poor masses in accusing private firms of engaging in business to enrich themselves while impoverishing the majority. Although this type of mistrust is common in many countries and is an obstacle that OTF has faced on other engagements, the depth and history of the emotions involved seems to greater than many other countries in which we have operated.

Limited coordination and focus. The senior leadership of Haiti is extremely impressive in terms of its education, training and skills compared to other countries in its
1. HAITI—UNREALIZED POTENTIAL

- Doing Business ranking of 154 out of 182 indicating serious constraints to private sector growth.
- Potential increase in the minimum wage.
- Monetary policy favorable to imports.

- Most business strategies based on price competition and access to cheap labor.
- Production is concentrated in the hands of a few large firms or monopolies with a weak formal SME sector—estimated 90% of jobs are in the informal sector.

- Moderately unfavorable

- Lack of well trained human resources
- Excellent proximity to key markets.
- Lowest minimum wage in the hemisphere (1/3 of the DR)
- Efficient port logistics, especially for export products
- High interest rates (15-17%)
- Customs procedures add unnecessary delays to import & export of goods
- Low ICT penetration.

- Very weak support industries.
- Majority of inputs imported.
- Support institutions (governmental) weak.
- Collaboration and trust among cluster actors is low.

- Favorable

+ Population of 10 million represents the largest market in the region but with weak purchasing power.
+ Large regional market with CARICOM, the Bahamas and the Dominican Republic.
+ Privileged access to the U.S. market through HOPE II.

- Unfavorable

Fig. 2 Haiti’s Competitive Diamond is lacking

dvelopment bracket. What is missing is an “esprit de corps” where these leaders work together to achieve a common purpose on a scale large enough to have impact at the national level. This phenomenon was alternately described as “a team of Ronaldo’s with no coach” or “an orchestra without a conductor”, but the feeling is that consensus and shared objectives are required not only between the public and private sectors, but even within the private sector and government. The good news here is that there are small success stories such as CTMO HOPE Commission and others that can serve as a proof of concept for what is possible, but the scale and frequency needs to increase exponentially.

Atmosphere of pessimism and fatigue. Although our overall experience in Haiti was excellent, we often felt that the core leadership team was physically and emotionally tired and pessimistic about Haiti’s prospects. This atmosphere is prevalent at several different levels. In many of the group and one-on-one events with which we were involved, conversations tended to “go negative” very quickly with the recounting of both current and historical stories of frustration and opportunities lost because of the interference of certain individuals or institutions. At the national level, this pessimism is seen in the press, where we were told explicitly that bad news sells and that the motivation to seek out and publicize good news is limited. Finally, the vast majority of international press contributes to Haiti’s image as a failed or fragile state that is hopelessly broken. A key output of the SVP
must be to break this cycle of negative press and news and create some excitement and optimism at all levels of Haitian society and in the international media.

Focus on the tip of the iceberg of Haiti’s private sector. Haiti’s formal private sector is small, leading to an over-reliance on a small number of firms to create jobs and serve as the country’s tax base. In addition, this focus on a few small firms means that improvements in the business environment are seen to benefit only the elite, not society as a whole. At the same time, many of the established, large firms discount the importance and potential of emerging small and micro firms to contribute to the country’s economic growth. For the SVP to be a success, we must define the private sector more broadly, nurture entrepreneurs, and encourage firms to formalize in order to deepen the country’s tax base. As highlighted in the graphic below, a key difference in the economic structure of high and low income countries is the importance of formal SMEs to job creation; in high income countries, they are the driver; in low income countries, they play a secondary role.

**HAITI IMPRISONED IN A SURVIVAL CYCLE**

These patterns are a result of Haiti’s current economic context, the mindsets of its leaders and the subsequent actions of its firms and more generally the private sector. The combination of these factors creates what we call the “Survival Cycle” where the country merely “runs in place” thanks to the billions of dollars infused by the international community. The challenge for Haiti is to break the Survival Cycle and create prosperity for all citizens. [Figure 3]

Despite the existence of a wide variety of products and services that Haiti could export both regionally and to the enormous U.S. market, export growth over the past 10 years has become increasingly dependent on the garment assembly sector. This industry has grown from only 56% in 1997 of total exports to 84% in 2007. Although in some ways good news, this over-dependence on one hyper-competitive and cyclical industry is a dangerous position for Haiti. Given the overall increase in export volumes from $195 million in 1997 to just over $600 million in 2007, the volume of all other exports has remained flat for the past 10

![Figure 3: The Survival Cycle](image)
years, indicating a need to identify strategies for growth in these existing sectors or the identification of new sectors that could be developed. This is especially worrying that the industry of the assembly depends on time-bound benefits related to HOPE II legislation. Also, the volume of exports through the porous Haitian-Dominican border and neighboring islands is difficult to estimate. [Figure 4]

Haiti must take advantage of the international spotlight to break the cycle of dependency. World leaders such as President Clinton, the investor George Soros and international development partners need to participate in the economic reconstruction of Haiti. A consensus is emerging on the need to focus investment to break the survival cycle. Two hundred years after political liberation of the island, the economic suffering of the population threatens the survival of Haiti. Haiti must break free from the yoke of economic decline to fully realize the promise of hard gained independence in 1804. This is the challenge of the current generation of Haitians.

Fig. 4 Haiti’s Total Exports, 2007
* Data source: UN COMTRADE Database
2. Growth and Social Equity through Competitiveness

Haiti has managed, until recently, to live up to the challenge of national independence because Haitians were able to live free and survive. The crisis of the last twenty years calls into question the core belief of Haitians, i.e. that their survival is guaranteed. The new economic model for Haiti must ensure survival, freedom and opportunity for all. The competitiveness model proposed below will help the Haitian nation to reconcile its own values with the creation of prosperity.

THE IMPORTANCE OF GROWTH AS A NATIONAL PRIORITY
Haiti’s Growth and Poverty Reduction Strategy Paper (DSNCRP) foresees a tripling of the country’s total GDP between 2006 and 2015. Growth rates for the projection period assume growth rates of between 4 and 7.5%, far higher rates than at any time since 1960, for which reliable data is available. Based on OTF’s experience, this type of growth is possible, but it requires commitment from the public and private sectors to work in partnership to invest in the higher or social forms of capital required to compete and win in today’s economy. Relying on basic products and unsophisticated factors of advantage cannot achieve or sustain this type of growth. Under this scenario, the private sector must become the engine of growth by identifying new business opportunities and then configuring its operations to serve attractive market segments. The SVP is a first step towards a model of partnership between Haiti’s public and private sectors to create a new model of economic growth and social equity that will serve to break the country’s vicious cycle of economic decline. [Figure 5]

TOWARDS A GROWTH AGENDA BASED ON COMPETITIVENESS
A nation’s standard of living is determined by its productivity, meaning how well all of its citizens work together to create value for foreign customers and for one another. Professor Paul Krugman of MIT spoke for the economics profession when he wrote, “the growth in a nation’s standard of living equals the growth of the nation’s productivity—period.” How can firms and nations improve productivity and become more competitive?

First, they can improve the choices they make about which customers to serve and what services to offer. This will mean that a nation’s firms must seek to offer complex, high-value services to customers who will pay a premium for them. Second, firms can improve the efficiency with which they combine people with other resources to deliver the chosen services to the desired customers.

The forces in the national diamond work together toward the formation of clusters of competitive industries, a prominent feature of every advanced national economy. A cluster includes all of the related and supporting industries involved in the production and delivery of a specific product or service. Cluster methodologies emphasize the inter-relationships among the many industries, suppliers, and businesses that must work together. Once a healthy cluster forms, it must continually become stronger. Aggressive rivalry in one industry spreads through spin-offs or diversification. Information flows freely and innovations
spread rapidly via the relationships between customers and suppliers. These strong linkages are critical to the competitiveness of a region or a country.

Until recently, the most successful nations created wealth by exporting the natural resources they had in abundance; their comparative advantages. Globalization and innovation have either made these resources more plentiful or less important, reducing their value and making these comparative advantage societies poorer over time.

Today, the most successful nations, the competitive advantage societies, create wealth by exporting complex products and services created by highly skilled people. Adopting this new approach will require that leaders rethink fundamental assumptions about the nation’s people, companies and economy, causing a “change in the mind of the nation.” Mass production and economies of scale are theories which lie behind the routine decisions and activities of societies mired in comparative advantage thinking. Innovative nations are replacing these concepts, and using new thinking to retrain and fundamentally re-educate their people. These changes require time and commitment.

Haiti literally cannot afford to continue with a comparative advantage model. In the globalizing world economy, a nation must base its wealth on the competitive advantage model if it is to raise standards of living for the majority of its citizens. This will require, among other things, fundamental changes in the economic models used in both countries’ industries. Our experience has taught us that both industry and government must play a part in the process of building competitiveness. Firms must invest, reconfigure themselves, and narrow or diversify product lines based on market knowledge. Government must take steps to develop institutions, regulations, and specialized infrastructure that enhance the competitive advantages of home-based firms.

Haiti must embrace a national process of change and competitiveness. The competitiveness approach is a marathon that requires a nation to initiate a process of real change. The Shared Vision Process for Haiti is a first step in this change process, but must be followed by a medium-term program to change the structure of the Haitian economy through the growth of priority clusters to be identified in the visioning process. How can Haiti in its quest for
competitiveness exploit the potential of the private sector and transform its economy while meeting its commitment to poverty reduction? The solution is a program allowing private enterprise to invest in clusters, to receive assistance for value added activities and especially to be able to sell innovative products on the international and domestic market. At the end of the day, the competitiveness of the Haitian economy, job creation and increased investment will all be based on corporate profitability.

THE GC, AN INCLUSIVE WORKING GROUP
In January 2009, President René Préval mandated the Working Group on Competitiveness (GC) to create a vision and propose elements of a competitiveness strategy for Haiti. This committee of 20 members from the private sector, government and civil society has worked since its creation on the articulation of a plan and competitive strategy for Haiti and an improvement in business climate. Members and affiliations of the GC are identified in Appendix 2.

The GC has clarified its mandate by focusing on a shared vision for competitiveness and growth of Haiti. Given the many challenges facing Haiti, the GC agreed that the first step towards a plan and competitive strategy for Haiti was the development of a vision shared by all. Furthermore, the time allocated to the commission would not allow for the development of a detailed plan.

To fulfill its mission, the GC is organized into three sub-committees. The agriculture sub-committee has ensured that the GC understands the challenges of the rural world and the Haitian peasantry. The “Quick Wins”sub-committee addressed issues such as the minimum wage and the Doing Business report. Finally, the communications subcommittee has taken the lead to promote the GC through media events and campaigns.

Recognizing the various challenges facing Haitian society, the GC has engaged
in frank debate in both the plenary and subcommittees. The main challenge for the GC is to propose a vision that fully meets the expectations of the Haitian population. This required much discussion and facilitation to enable the GC to build consensus among its members that it now hopes to facilitate for the entire Haitian society over the medium to long-term.

To achieve its objectives, the GC is based on a methodology proposed by OTF Group. This methodology, adapted to Haiti, seeks to incorporate local knowledge to propose a vision “for Haiti, by Haitians”. This debate led to the choice and focus on the most promising sectors for the country to jump-start its economy. Details of the methodological approach are outlined in the next section.

**METHODOLOGY—ANALYSES, ACTIONS, ATTITUDES**

The GC used the approach Analysis, Actions and Attitudes to achieve its mandate. The Shared Vision Process (SVP) is meant to break the status quo with a three-pronged approach that combines world class research and analysis, change in attitudes, and action-oriented public-private partnership (PPP) to articulate a shared vision for Haiti. A summary of the main project components and activities is illustrated in Figure 7 on the left.

What are critical are the respective roles of the GC and OTF Group in terms of advancing the process. OTF Group should be viewed as a facilitator and technical secretariat to the GC. The GC holds all decision rights for the Shared Vision Process and should make its decisions based primarily on analysis and data, not political considerations and emotion. One decisions are made, the GC should use its formal and informal networks to ensure that recommendations are implemented. [Figure 7]

The analysis focuses on the prioritization of the priority clusters and the identification of constraints to SMEs. This aspect of the approach is specifically three elements:

- a) review of reports and studies available;
- b) a survey of political leaders, SMEs and local entrepreneurs to evaluate business environment challenges and level of support required by SMEs and c) the prioritization of sectors to identify growth clusters for Haiti.

Action attempts to break the strong inertia that exists in Haiti through improvements based on key decisions made by the GC or resulting from the implementation of high-impact actions. For example, facilitating and expediting the administrative process for setting up businesses. The GC and stakeholders from all sectors are eliminating business barriers to improving the position of Haiti in the ranking “Doing Business” by the World Bank.

Attitudes focus on attitudes that may pose an obstacle to competitiveness. The ultimate goal is to create a culture of entrepreneurship. Often overlooked in economic development programs, this aspect is crucial in implementing not only the Shared Vision Process but also in improving competitiveness at a national level. This process begins with a survey of attitudes to identify potential bottlenecks in the attitudes of Haitians.
CONSULTATIVE SHARED VISION PROCESS
A national survey of 752 Haitian leaders. In May 2009, the OTF Group conducted a national survey representative of all segments of society. Geographically, Port-au-Prince, Cap Haïtien, Les Cayes and Jacmel were chosen based on their economic importance. The research targeted private companies, government, students, religious organizations, NGOs and the press. The survey results were discussed extensively through consultations with various government institutions, civil society and the private sector. In June and July 2009, the GC held a series of consultations to validate these preliminary results with the Presidency, the Ministry of Economy and Finance, Ministry of Commerce and the Central Bank. The GC also met with civil society and private sector associations. A complete list of groups is found in the Appendix.

LACK OF TRUST AT ALL LEVELS OF SOCIETY
84% of respondents underscore the importance for all segments of the population to have a common vision before Haiti can move forward. This matches well with the mandate granted by the President of the Republic to the GC. In order to ensure that the shared vision is a force for the economic transformation of Haiti, it is important to focus on sustained and equitable economic growth.

Trust is low, especially between the public and private sectors. The majority of respondents identify the lack of trust in Haitian society as a huge issue, with only 16% of respondents saying that there is trust between the government and the private sector. Although the analysis focuses on public and private sectors, our hypothesis is that this lack of confidence is widespread. This represents a major constraint to the articulation of a shared vision. (Figure 8)

The lack of a consultation is reported as a barrier to development. Respondents in general complained of a lack of trust and dialogue between the government and the private sector. These different perceptions and constraints must be openly discussed to reach a common understanding of key actions required to resolve the challenges faced by each group. The illustration below shows the perceptions of each key stakeholder group.

Trust between actors is a prerequisite for competitiveness in Haiti. Without some
3. PRELIMINARY RESULTS OF THE SVP

Fig. 9 The Four Segments of Haiti, the need for dialogue

Note: N=861 pour segments originaux, N=732 for Haiti.
Source: Segment definitions based on 1998 Monitor Company Surveys: El Salvador, Bermuda, United States, Palestinian Authority; Haiti data analyzed based on the segments from the previous four survey edits.

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Fig. 10 The Four Faces of Haiti

Frantz
- Cautious Followers (32%)
- Government control
- The market is a threat
- Basic factors are sufficient to compete

Georges
- Need Change Now (31%)
- Needs change
- Short-term focus
- Joint leadership

Serge
- Competitive Advantage (30%)
- Focus on basic factors
- Government control
- The market is a threat
- Short-term focus

Bernard
- Competitive Advantage (7%)
- Innovation = wealth
- Market = prosperity
- Private sector leadership
- Competitive products
degree of trust between the actors of a society, investment will not be realized and growth stagnates. Thus, the level of confidence in a society, according to Fukuyama, can help lower administrative costs and corruption.

Four segments of opinion exist in Haiti vis-à-vis competitiveness. 30% of leaders surveyed want to see an immediate change, 32% are cautious followers and said they favor maintaining the status quo, 30% favored a comparative advantage based on cheap labor and low costs. Only 7% see the need to develop a competitive advantage based on innovation and productivity. These segments also point the need to build a consensus around competitiveness. [Figure 10]

Haitians want to see change. About one third of the Haitian leaders interviewed in the survey of attitudes conducted by OTF expressed a need for change. This result is reinforced by the fact that 45% of respondents believe that Haiti does not have the luxury of thinking about a sustainable economy because it needs immediate results. When these results were discussed, the leaders noted that in Haiti there is a tendency to only act in emergencies and in reaction to events. It is therefore important to reconcile the urgent imperatives with the need to plan in the medium and long-term.

Consensus exists on the environment, exports and fair treatment of all provinces. 96% of respondents agreed to prioritize environmental security in Haiti. Furthermore, 87% of respondents want to see export promotion prioritized. 84% of leaders agree on the importance of a common vision for progress in Haiti. These consensus elements are important in the articulation of a vision that is shared and can mobilize stakeholders. [Figure 11]

The Diaspora is seen as an under-utilized resource. For a population of about 10 million, Haiti has a Diaspora of more than two million. Not surprisingly, it is impossible to think of the development of Haiti while ignoring the Diaspora, especially when you consider its contribution to the economy. It is estimated that remittances from the Diaspora represented $1.3 billion in 2008.
roughly 20% of GDP and more than international aid [Figure 12]

THE HAITIAN ICEBERG—REDEFINING THE PRIVATE SECTOR
The structure of the private sector in the form of an iceberg. The vast majority of businesses are informal in Haiti, probably 95% of them. An element of the competitiveness agenda in Haiti must be the progressive formalization of micro, small and medium enterprises to transform the structure of employment and tax base of the country. [Figure 13]

A poor perception of private sector that is strongly associated with the elite. For the majority of stakeholders in Haiti, the country’s private sector is defined by a few large companies. This analysis is problematic on two levels. First, it ignores the key role played by small and medium enterprises as an engine of innovation, job creation and as a tax base. Second, its exclusive nature creates a tension with regard to improvements in business climate, as most believe that this kind of initiative only favors a few companies, not society as a whole.

The situation of the Haitian private sector is akin to bankruptcy at the top and poverty at the bottom. 63% of SMEs interviewed suggest that their profits have declined over the past three years based on the survey of over 300 SMEs. Although overall economic conditions are a factor, informality also plays a role. An inclusive policy and support to the private sector is necessary to improve this situation. [Figure 14]

Corruption, crime and uncertainty emerge as major constraints for SMEs. Over 85% of respondents identified crime and corruption as major constraints. Furthermore, access to electricity, lack of skilled labor and credit increases the cost of doing business. In general, the services sector seems to be more affected by the constraints associated with procedures than the manufacturing sector. [Figure 15]

When seeking help, respondents rely on their personal networks. 82% of SMEs surveyed would like to receive assistance.

---

**Fig.12 Diaspora as under-utilized resource**

<table>
<thead>
<tr>
<th>Question</th>
<th>Distribution of Responses (1 to 7 scale)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Haitian Diaspora should play a bigger role in the economic development of Haiti.</td>
<td>93% (Agree) 39% (Neutral)</td>
</tr>
<tr>
<td>The Haitian Diaspora represents a huge potential market for Haitian exports.</td>
<td>83% (Agree) 6% (Neutral) 10% (Disagree)</td>
</tr>
<tr>
<td>A relationship with the Haitian Diaspora offers opportunities for business partnerships, commercial relationships and transfers of information.</td>
<td>83% (Agree) 6% (Neutral) 11% (Disagree)</td>
</tr>
<tr>
<td>Members of the Haitian Diaspora are asking for more information about investment opportunities in Haiti.</td>
<td>81% (Agree) 8% (Neutral) 11% (Disagree)</td>
</tr>
</tbody>
</table>
3. PRELIMINARY RESULTS OF THE SVP

**Job creation contribution by type of firm**

<table>
<thead>
<tr>
<th>Type of Firm</th>
<th>Developed Countries</th>
<th>Undeveloped Countries</th>
<th>Haiti (hypothetical)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Largo Enterprises</td>
<td>28</td>
<td>67</td>
<td>8</td>
</tr>
<tr>
<td>Informal SMEs</td>
<td>18</td>
<td>29</td>
<td>90</td>
</tr>
<tr>
<td>Formal SMEs</td>
<td>83</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: SME’s Across the Globe, Ayayeget, Bank, CIphone, World Bank, 2005. Formal SME’s here between 3-199 employees and hold relevant licenses. Largo firms are those with >100 employees.

**Fig. 13 The Iceberg of the Haitian Private Sector**

<table>
<thead>
<tr>
<th>Increased</th>
<th>Stayed the same</th>
<th>Decreased</th>
</tr>
</thead>
<tbody>
<tr>
<td>17%</td>
<td>63%</td>
<td>20%</td>
</tr>
</tbody>
</table>

**Fig. 14 Stated Profitability of Haitian SMEs**

Specifically, these SMEs would like to receive assistance in marketing and operations. Today 53% of these SMEs are turning to friends and family which indicates that professional support to SMEs is required in the form of business development services (BDS). **[Figure 16]**

The competitiveness agenda of Haiti must include support for micro, small and medium enterprises (SMEs). The introduction of a wider range of business development services (BDS) and financial support for SMEs is likely to create even more jobs in this sector and may encourage more companies to join the formal sector. This could transform the structure of employment and broaden the tax base of the country.

**Priority Clusters as the Economy’s “Strikers”**

The criteria for prioritization of growth clusters are based on the objectives of Haiti as articulated by the GC. Beyond job creation, the process of prioritization can also develop a diversified portfolio of sectors to be taken into account, for example, selecting a balance of industry, agriculture and services instead of selecting three agricultural clusters. The process is illustrated below. This approach allows to better distribute the impact of the SVP by creating jobs and wealth between different regions and sections of population (rural and urban, young and old, among others). **[Figure 17]**

These assessments are based on rigorous analytical criteria defined by the GC. Based on a survey of members of the GC and the national survey implemented on behalf of the GC by the OTF, the following criteria (more than 50% of members consider as priorities) are key elements of the vision: creating jobs and economic impact in the short term. Other factors such as import substitution and a migration strategy for added value are also considered important. A full overview of the criteria is found on page 26.

Job creation, in the broadest sense meaning creation, preservation or improvement of employment in the form of higher incomes, is the most important criteria for all stakeholders. Based on numerous reports for conservative figures estimate for the impact of employment, the GC has developed the ranking below to go from the “long list” of 46 to 15 clusters that deserve further study. These clusters were subjected to a rigorous strategic analysis that drew upon quantitative and qualitative analysis. **[Figure 18]**

Sustainable employment criteria, based on “rules of thumb” and UN Statistics: This criterion receives a 25% overall weighting. Due to inconsistencies in the availability of consistent data sets for all sectors in question, scoring for this criterion is based on a combination of quantitative and qualitative...
Fig. 15 Major constraints cited by SMEs

Fig. 16 SMEs Need Help

Who do you ask for assistance with improving the operations of your business?

Types of training desired by SMEs

Would you like to receive external assistance?
research, as well as industry standard “rules of thumb”, where available to benchmark results. The figure below represents potential job creation, by sector. A 0 to 2 scale was employed to complete final scoring, where 0 represents low potential for job creation or low potential for the improvement of existing employment, while 2 represents high potential for job creation, or potential for the creation or improvement of very high quality jobs. [Figure 19]

The following highlights several areas of scoring for sustainable employment:

- **Agriculture:** As a base reference for the scoring of sustainable employment potential in agriculture, preliminary secondary research was conducted using 2009 FAOSTAT, UN Statistics to identify crop share of arable land and permanent crops in Haiti. The following figure further illustrates job creation calculation methodology in agriculture. [Figure 20]

- **Tourism:** Using the guideline of one job created for every seven arrivals in a country, we arrive at the potential for the...
creation of 16,000 jobs in Haiti, based on the 2005 arrivals figure of 112,000 true international visitors.

Import Substitution, based on COMTRADE and Trademap data. This criterion, receiving a 10% overall weighting, is based on data of imports into Haiti, pulled from recent reports on Haiti, international data sources, including Trademap and COMTRADE, as well as from broad stakeholder consultations. The import substitution criterion is, in particular, used to emphasize and weight agricultural products that provide basic sustenance and food security. A preliminary scoring matrix was developed, using a 0 to 2 scale, in which all relevant agricultural products were ranked against each other, based on current annual imports, in tons, as detailed in the figure below. Agricultural products with the highest levels of imports received the highest scores. Combined with information from stakeholder consultations on food security, these scores were used as a base reference to complete a final scoring for sectors in question. [Figure 21]

Environmental sustainability, based on the realities of environmental security
3. PRELIMINARY RESULTS OF THE SVP

Example
- In 2006, 32,000 hectares were used to harvest Mangoes & Guavas in Haiti
- Mangoes & Guavas are cash crops, therefore the maximum area of land that household would allocate to produce Mangoes was 37.7%. This seems reasonable as most of the area is usually allocated to staple and satisfy food security
- Therefore, Mangoes are cultivated by approximately 84,000 smallholder farmers
- The area for producing mangoes would represent 37.7% of their land or less.

H.a of land for Mangoes in 2006 = 32,000
84,000 = 37.7%

Risks
- The figures seem conservative:
- If less than 37.7% of the area is allocated to Mangoes, the number outreach would increase
in Haiti. This criterion, receiving a 10% overall weighting, is based primarily on secondary industry-specific research on environmental impacts, as well as on broad stakeholder consultations to determine the environmental realities in Haiti. A 0 to 2 scale was employed to complete final scoring, where 0 represents sectors that could potentially be damaging to the environment, 1 represents a neutral sector, not having major positive or negative effects on the environment and 2 represents sectors or products that could potentially have a significant positive impact on the environment. As an example, the high value fruits sector receives a high score of 2 for this criterion, as fruit trees and various grasses and bushes help to prevent soil erosion which plagues Haiti today.

Product Sophistication, based on the PRODY index: This criterion, receiving a 10% weighting, is based on the PRODY Sophistication Index, a measure of the revealed sophistication for each product in question. This is calculated based on the revealed comparative advantage (RCA)—weighted GDP per capita of each country that exports the good in question: [Figure 22]

The following demonstrates the ranking and scoring of the agricultural products in question based on their PRODY, receiving a score of 0 for low sophistication and 2 for high sophistication. [Figure 23]

Rapid implementation, based on the ease of diversification index: Receiving a 15% weighting, the scoring for this criterion is based on broad stakeholder consultations regarding plausibility for rapid product implementation and scalability in Haiti, combined with an ease of diversification index, which serves to quantify a products proximity to Haiti’s current Export Basket*, as demonstrated in the figure on the right. [Figure 24]

International and Regional Demand, based on import and export data from COMTRADE & Trademap: This criterion, receiving a 10% weighing, is based on

<table>
<thead>
<tr>
<th>Product</th>
<th>Tons Imported</th>
<th>Rank</th>
<th>Score</th>
<th>Product</th>
<th>Tons Imported</th>
<th>Rank</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rice, paddy</td>
<td>309,015.5</td>
<td>1</td>
<td>2.00</td>
<td>Lemons and limes</td>
<td>6.7</td>
<td>22</td>
<td>0.55</td>
</tr>
<tr>
<td>Beans, dry</td>
<td>18,449.6</td>
<td>2</td>
<td>1.93</td>
<td>Lettuce and Chicory</td>
<td>5.8</td>
<td>23</td>
<td>0.48</td>
</tr>
<tr>
<td>Garlic</td>
<td>9,758.2</td>
<td>3</td>
<td>1.86</td>
<td>Oranges</td>
<td>5.2</td>
<td>24</td>
<td>0.41</td>
</tr>
<tr>
<td>Pigeon peas</td>
<td>8,535.7</td>
<td>4</td>
<td>1.79</td>
<td>Tangerines, mandarins, Clementines</td>
<td>3.9</td>
<td>25</td>
<td>0.34</td>
</tr>
<tr>
<td>Cow peas, dry</td>
<td>8,535.7</td>
<td>4</td>
<td>1.79</td>
<td>Groundnuts, with shell</td>
<td>3.0</td>
<td>26</td>
<td>0.28</td>
</tr>
<tr>
<td>Pork</td>
<td>5,367.9</td>
<td>6</td>
<td>1.66</td>
<td>Spinach</td>
<td>2.2</td>
<td>27</td>
<td>0.21</td>
</tr>
<tr>
<td>Roots and Tubs, nes</td>
<td>5,001.0</td>
<td>7</td>
<td>1.59</td>
<td>Sesame seed</td>
<td>0.1</td>
<td>28</td>
<td>0.14</td>
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<tr>
<td>Sorghum</td>
<td>4,441.9</td>
<td>8</td>
<td>1.52</td>
<td>Yams</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Tobacco, unmanufactured</td>
<td>504.7</td>
<td>9</td>
<td>1.45</td>
<td>Sweet potatoes</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Cattle</td>
<td>497.8</td>
<td>10</td>
<td>1.38</td>
<td>Melons</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Potatoes</td>
<td>197.8</td>
<td>11</td>
<td>1.31</td>
<td>Castor oil seed</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Goat</td>
<td>83.8</td>
<td>12</td>
<td>1.24</td>
<td>Seed cotton</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
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<tr>
<td>Cassava</td>
<td>30.5</td>
<td>13</td>
<td>1.17</td>
<td>Cocoa beans</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Cabbages and other brassicas</td>
<td>29.2</td>
<td>14</td>
<td>1.10</td>
<td>Sisal</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Pineapples</td>
<td>21.5</td>
<td>15</td>
<td>1.03</td>
<td>Sugar cane</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
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<tr>
<td>Avocados</td>
<td>21.5</td>
<td>15</td>
<td>1.03</td>
<td>Plantains</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
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<tr>
<td>Maize</td>
<td>20.6</td>
<td>17</td>
<td>0.90</td>
<td>Bananas</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Grapefruit</td>
<td>14.8</td>
<td>18</td>
<td>0.83</td>
<td>Coffee, green</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Mangoes, mangosteens, guavas</td>
<td>14.8</td>
<td>18</td>
<td>0.83</td>
<td>Eggplants</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Tomatoes</td>
<td>10.4</td>
<td>20</td>
<td>0.69</td>
<td>Onions, dry</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
<tr>
<td>Coconuts</td>
<td>7.6</td>
<td>21</td>
<td>0.62</td>
<td>Chicken</td>
<td>0.0</td>
<td>29</td>
<td>0.07</td>
</tr>
</tbody>
</table>
QUANTITATIVE VS. QUALITATIVE RESULTS
Based on international import data, poultry receives a very low score on import substitution, however this alone does not yet factor in poultry's large potential in Haiti for food security, not only with meat, but also with eggs. To arrive at the most accurate assessment of sector potential, quantitative results are tested against qualitative results.

\[ PRODY_t = \sum_{e} \left( \frac{\text{val}_t(e)/X_t}{\sum_{j} \text{val}_t(e)/X_t} \right)^2 \]

Fig. 22 PRODY
Sophistication
Index Equation

Fig. 23 Agriculture
Product PRODY
Ranking

<table>
<thead>
<tr>
<th>PRODY</th>
<th>Rank</th>
<th>Score</th>
<th>PRODY</th>
<th>Rank</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pork</td>
<td>31059.5</td>
<td>1</td>
<td>2</td>
<td>Pineapples</td>
<td>3075479</td>
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<tr>
<td>Potatoes</td>
<td>20147.36</td>
<td>2</td>
<td>1.952361</td>
<td>Avocados</td>
<td>3075479</td>
</tr>
<tr>
<td>Sweet potatoes</td>
<td>20147.36</td>
<td>2</td>
<td>1.952361</td>
<td>Sugar cane</td>
<td>2929514</td>
</tr>
<tr>
<td>Goat</td>
<td>18167.92</td>
<td>4</td>
<td>1.857143</td>
<td>Spinach</td>
<td>2633.21</td>
</tr>
<tr>
<td>Chicken</td>
<td>14226.78</td>
<td>5</td>
<td>1.809524</td>
<td>Sisal</td>
<td>2221666</td>
</tr>
<tr>
<td>Sorghum</td>
<td>13139.87</td>
<td>6</td>
<td>1.761905</td>
<td>Rice, paddy</td>
<td>2127905</td>
</tr>
<tr>
<td>Grapefruit</td>
<td>10678.09</td>
<td>7</td>
<td>1.714286</td>
<td>Plantains</td>
<td>1742512</td>
</tr>
<tr>
<td>Tangerines, mandarins, Clementines</td>
<td>10678.09</td>
<td>7</td>
<td>1.714286</td>
<td>Bananas</td>
<td>1742512</td>
</tr>
<tr>
<td>Lemons and limes</td>
<td>10678.09</td>
<td>7</td>
<td>1.714286</td>
<td>Pigeon peas</td>
<td>1616712</td>
</tr>
<tr>
<td>Oranges</td>
<td>10678.09</td>
<td>7</td>
<td>1.714286</td>
<td>Cow peas, dry</td>
<td>1616712</td>
</tr>
<tr>
<td>Mangoes, mongosteen, guava</td>
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<td>7</td>
<td>1.714286</td>
<td>Coffee, green</td>
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<td>Cattle</td>
<td>10640.61</td>
<td>12</td>
<td>1.47619</td>
<td>Tobacco, unmanufactured</td>
<td>1200.93</td>
</tr>
<tr>
<td>Garlic</td>
<td>9217.283</td>
<td>13</td>
<td>1.426571</td>
<td>Lettuce and Chicory</td>
<td>1124391</td>
</tr>
<tr>
<td>Onions, dry</td>
<td>9217.283</td>
<td>13</td>
<td>1.426571</td>
<td>Castor oil seed</td>
<td>1042.047</td>
</tr>
<tr>
<td>Cabbages and other brassicas</td>
<td>9368.175</td>
<td>15</td>
<td>1.333333</td>
<td>Sesame seed</td>
<td>1042.047</td>
</tr>
<tr>
<td>Eggplants</td>
<td>7273.303</td>
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<td>1.265714</td>
<td>Coconuts</td>
<td>964.6061</td>
</tr>
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<td>Tomatoes</td>
<td>7079.382</td>
<td>17</td>
<td>1.236056</td>
<td>Roots and Tubers, nes</td>
<td>635.4371</td>
</tr>
<tr>
<td>Melons</td>
<td>4986.495</td>
<td>18</td>
<td>1.190476</td>
<td>Yams</td>
<td>635.4371</td>
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<tr>
<td>Maize</td>
<td>4202.898</td>
<td>19</td>
<td>1.142857</td>
<td>Cassava</td>
<td>635.4371</td>
</tr>
<tr>
<td>Beans, dry</td>
<td>3678.608</td>
<td>20</td>
<td>1.092386</td>
<td>Cocoa beans</td>
<td>620.058</td>
</tr>
<tr>
<td>Seed cotton</td>
<td>3265.332</td>
<td>21</td>
<td>1.047619</td>
<td>Groundnuts, with shell</td>
<td>198.9206</td>
</tr>
</tbody>
</table>

regional and international Trademap and COMTRADE export and import data. The following figure demonstrates export potential for Haiti’s mangos, based on international import data. [Figure 23]

Preconditions for change, based on the “five preconditions of change”: Receiving a 10% weighting, this criteria is based on broad stakeholder consultations and qualitative analysis surrounding the five preconditions to change, as illustrated on the right. This criterion serves to measure whether a particular sector has the fundamentals that would be necessary in order to quickly enhance or develop the sector. Of particular note is the precondition of leadership, which includes public sector, but could also include strong industry associations and visionary private sector leaders.

Potential to create SMEs, based on up front investment costs and base infrastructure: Receiving a 5% weighting, this criteria is based qualitative analysis of the ease of setting up an SME in a given sector, based on up front investment costs, speed of
implementation, industry margin rates and existing financial and "hard"infrastructures. As an example, dairy receives a low score in this category due to the approximate $150,000 required to build a dairy processing facility. While there sufficient demand for approximately 9,000 small-sized dairy processing centers in Haiti, the up front costs prevents the potential for rapid creation of SMEs in the sector.

Migration Strategy—Today's products form the base for tomorrow's higher value products: Receiving a 5% weighting, this criteria is based on qualitative analysis of the potential of each sector to migrate towards a higher-value product base. The following figure represent one potential migration path for Haiti's assembly sector, from its current low-value production of cotton T-shirts, valued at USD $0.27 per unit to products such as cotton skirts, generating USD $6–7 in revenues, per unit. Sectors, such as assembly, tourism and high-value fruits and vegetables with clear migration paths received the higher scores of 2, while sectors such as dairy, which require massive investment for upward migration, received lower scores. [Figure 26]

Strategic analysis was structured around Porter's Diamond. As mentioned above, Michael Porter's Diamond of Competitive Advantage is an insightful framework for identifying strengths and weaknesses of a cluster. To deepen this analysis we used a standard approach to provide a strategic orientation to the economic analysis conducted as a first screen. The frameworks used for each point of the diamond were:

- Context for Strategy: Porter’s 5 Forces is the reference point for diagnosing industry structure and competitive dynamics of the sector.
- Demand: where possible, UN Comtrade data was used to assess the attractiveness

See Appendix 5 for details of this analysis for the priority sectors
QUALITATIVE ANALYSIS

Haiti's assembly sector received a strong score of 2 for this criterion given the existence of ADIH and seasoned private sector leaders with strong connections to the foreign market. On the other hand, BPO receives only a score of 1 as it is a new, and little understood industry in Haiti with little institutional support, and no dedicated trade association.

of the market segments in which Haiti competes to quantify market size and historical growth.

- Cluster and Support Industries: the team constructed “cluster maps” to identify areas of improvement and gaps in the “networks of productivity” required for sophisticated clusters.
- Factors: OTF Group’s 7 Forms of Capital was used to audit the physical and social forms of capital to identify areas of strength and weakness in the core group of firms that anchor each cluster.
- Government: reviews of existing documents on sector policies and interviews were used to assess the impact of government activity on the respective sectors. [Figure 27]
Fig. 26 A potential migration path for Haiti’s assembly sector

Fig. 27 Competitive Diamond and Related Frameworks
4. Shared Vision—Opportunity for the Majority

The Shared Vision for Haiti must reconcile the essence of the Haitian nation—freedom and dignity—with the ultimate goal of competitiveness and the creation of prosperity. In view of the inequalities that exist in Haiti, this vision must take into account the interests of the various segments of Haitian society. The GC suggested the term “Opportunity for the Majority” to describe this vision, which must include objectives for the short term and medium-term development of Haiti. This section details the elements of this vision and provides recommendations for achieving it.

“Haiti creates opportunities for the majority of Haitians through a competitive, sustainable and diversified economy. Jobs, income and entrepreneurship are the cornerstone of the modernization of the economy. Haiti regains its economic strength by unifying its society and genuine integration into global economy.”

**OBJECTIVES AND STRATEGIC FRAMEWORK**

“Opportunity for the Majority” will become a platform for all Haitians. This vision captures the dream of the nation—that all farmers, government officials, entrepreneurs, businessmen, youth, women and children are included in the prosperity of the new Haiti. Also included in the definition of Haitian citizens, are members of the Haitian Diaspora who may be interested in investing or otherwise strategically engaging with Haiti. [Figure 28]

Although Haiti is potentially rich, this potential has not been transformed into income for its citizens. The Haitian nation should lay the foundation for a new era of growth and prosperity where the lives of its citizens are determined not by circumstances but by the personal and economic choices of its citizens. The notion of choice is a fundamental component of the future prosperity and competitiveness of Haiti. [Figure 29]

**STRATEGIC FRAMEWORK FOR THE VISION**

The vision focuses on three strategic goals, five priority clusters and five cross-cutting clusters. The vision is designed to balance the need of the country to concentrate limited resources and the possibility of improving the livelihoods of a majority of Haitians. The first aspect highlighted in the vision is the notion of financial independence, meaning freeing the country from its current dependence on foreign aid and the “handout” culture that accompanies it. Instead, these foreign aid inflows should be replaced by foreign direct investment which can contribute to building vibrant firms and clusters, deepen the country’s tax base and promote a culture of entrepreneurship that will propel Haiti’s economic renaissance. [Figure 30]

Opportunity for the Majority is also linked to better management of the physical environment plus the economic and cultural development of the Haitian nation.
1. Development of productivity through targeted strategies and policies
2. Informed choice of clusters and priority actions followed by timely action
3. Redefinition of the private sector to include SMEs and micro-enterprises
4. Culture of entrepreneurship and innovation in the public and private sectors
5. Social integration and competitiveness including farmers and micro and SMEs
6. Work together to beat the competition: union becomes the strength of society
7. Training and education of the Haitian population
8. Creating a performance culture
9. International aid as an input and not as a goal of the economic agenda
10. Integrated economy for all Haitian citizens

The environmental aspects of the vision are important: revitalizing key watersheds and revitalizing urban spaces. The economic environment must appeal to business, including the rule of law, while the cultural environment should instill in every citizen pride in being Haitian.

In the short term, the vision includes the creation of at least 500,000 jobs in three years through five growth clusters. Fully aware that the vision for Haiti would be achieved only in the medium term, the GC has articulated a framework in the short term to promote quick wins to jump-start the competitiveness agenda. This framework will also focus the energies of all the players around that vision and seeks to create a real dynamic for change.
PRIORITY GROWTH CLUSTERS
As noted above, the GC has prioritized five “clusters for the economy; high value fruits & tubers, animal husbandry, tourism, BPO, and apparel. For each of these sectors, a summary of the current situation, a vision for the sector and a preliminary growth strategy and path are presented for each industry based on improving productivity of the sectors through 1) improved operational efficiency, and 2) better strategy.

Fruits and Tubers Mangos are currently Haiti’s only major horticulture export with approximately $10.6 million in sales per year. The exotic fruits and vegetables sector brings significant potential to Haiti, especially in terms of job creation, as well as in exports to the US and regional markets, including the Dominican Republic and the Bahamas. The time is ripe to strengthen this sector, with significant local receptivity, including in particular strong government support and interest, as well as positive international perceptions of Haitian fruit and vegetable products: In 2005, Haiti’s mangoes sold for $6 per dozen versus Mexican mangoes at $4 per dozen. Additionally, Haiti’s abundant and relatively inexpensive workforce could be rapidly mobilized to serve as the backbone of this growing sector.

Despite these advantages, the sector continues to suffer from up to 60% crop loss throughout the supply chain due to poor infrastructure, and experiences difficulty moving up the value-chain due to the lack of availability of affordable financing for technology, with interest rates currently hovering at 12–15%. Additionally, the sector suffers from a fragmented production base, with farmers working in isolation from their neighbors, rendering it difficult to benefit from the economies of scale of medium and large scale farms.

A preliminary vision for Haiti’s high value fruit and vegetable sector seeks to position the industry as a “one-stop shop” for U.S. and regional buyers:

Haiti’s horticulture sector will draw upon its diverse micro-climates to produce and sell a wide range of high quality fruits and tubers to demanding buyers in the U.S. and the major tourism markets of the Caribbean. Development of the sector will have an impact on 200,000 producers and generate $45 million in exports by 2012 while contributing to the nation’s food security...

To transform itself into a one-stop shop, the sector must improve efficiency and diversify its product base. As noted above, up to 60% of the mango crop is unusable for export due to damage en route to market because of poor infrastructure. Improving efficiency here can dramatically improve volumes available for export while improved marketing of mangos and other products such as hot peppers, pineapples, avocados and sweet bananas in their natural form and more sophisticated products (dried, frozen, fresh, juice, cosmetic) can improve the productivity of the sector. The graphic below shows how the mango industry alone could evolve in the next three years; other products could more than quadruple sector exports.

In addition to fruit, tubers are prioritized for their strong food security characteristics, as well as their niche export potential. Tubers boast several properties that make it an important crop for ensuring food security, including its resiliency to floods and drought. They are an excellent source of calories, and can produce more carbohydrates per unit areas than is provided by other staples. Both the roots and leaves are suitable for human consumption. The former are an important source of carbohydrates and the latter of proteins and minerals. For Haiti, tuber
production could be hindered due to the fact that it is a crop that is highly perishable in raw form. Due to its high water content, tubers spoil within four days of being pulled from the ground, and should ideally be processed within two days. This will be a challenge for Haiti as its farmers prioritize this product. Aside from their strong food security potential, certain tubers including yams have strong demand from the U.S. market, emphasizing the potential for niche exports. [Figure 31]

In Afghanistan, dried fruit exporters increased and built trust by pursuing a forward integration strategy. A good understanding of marketing channels and customer needs is critical to upgrading the competitiveness of a sector. As part of a new export strategy, groups of Afghan exporters worked together to 1) identify a new market segment in the form of wholesalers in urban Indian markets, and 2) entered into joint procurement arrangements with each other to achieve the scale required to compete with larger Indian importers and meet the order needs of Indian retailers. Although a different context, this case study is relevant to Haiti for at least three reasons. First, this type of marketing innovation did not require any change in the actual product or expensive investments into infrastructure or equipment; just a change in marketing channels. Second, it challenged the conventional wisdom of exporting to Europe by targeting a regional market of middle to upper-class Indians willing to pay up to $2.5 per kilogram for certain varieties of raisins. Finally, Afghan exporters rebuilt trust with each other through the pursuit of a concrete business opportunity. [Figure 32]

Animal Husbandry The GC has concluded that in the context of improving food security in Haiti, the fight against poverty and income generation for the majority, the activities of peasant family farming and

---

**Fig. 31 Growth Strategy, Fruits & Tubers**

![Graph showing revenue projections for mangoes from 2009 to 2012](image)

<table>
<thead>
<tr>
<th>Year</th>
<th>Tons</th>
<th>Price per ton</th>
<th>Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>9,000</td>
<td>$1.10</td>
<td>$10,000,000</td>
</tr>
<tr>
<td>2012</td>
<td>13,500</td>
<td>$1.75</td>
<td>$23,860,000</td>
</tr>
<tr>
<td>Multiple</td>
<td>1.5</td>
<td>1.5</td>
<td>2.25</td>
</tr>
</tbody>
</table>

Source: COMTRADE Data, GTC & OTF Group Interviews & Analysis
semi-intensive animal husbandry of offer tremendous opportunities to:
- generate additional revenue for the majority of Haitians,
- improve the availability of high nutritional value food, especially protein
- contribute to the protection and rehabilitation of the environment and development of the watershed with a view to preserve the production infrastructure
- increasing the value of agricultural to improve the country’s trade balance

In this sense, the group proposes (according to the potential and agro-ecological characteristics of each watershed and each area of intensive agricultural production) an extensive program to support semi-intensive rearing of livestock for the generation of employment to protect the catchment areas of major irrigated areas of the country. It is therefore a program to support family farming and semi-intensive small animal husbandry (poultry, goats, rabbits, pigs) and development of dairy production. The program focus primarily around large areas of irrigated agriculture for the development of various products and preservations of the corresponding catchment areas.

**Rationale for the Strategy** The conditions under which Haitian agriculture has evolved (dominated by small farms) is one of the contributing factors to environmental degradation and unsustainable exploitation of natural resources. Watershed degradation endangers all agricultural infrastructure (roads and irrigation systems).

Today, because of lack of investment in agriculture, the majority of farms located in the mountains have been decapitalized. Some major crops that once were a factor in the preservation of vegetation cover, such as coffee and cocoa are in decline. For decades and forested areas have been replaced by root crops (maize, sorghum, beans, potatoes), which are more financially profitable.

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Fig.32 Case Study: Afghan Dried Fruits

**Challenge: being chosen by customers**
- Although Afghan exporters sold high quality products, they were a “victim” of the market in that they often sold to intermediaries or low value markets.
- The conventional wisdom at the time was to export to the EU where prices were believed to be higher.

**Solution: reconfigure the distribution channel**
- Through market research, certain groups of exporters identified an opportunity to forward integrate by establishing wholesale operations in India.
- A key component of the strategy was joint marketing by groups of firms to achieve scale; a critical trustbuilding activity.
- Exporters were able to triple or quadruple margins for certain items with no changes to the physical product.
in the short term, but environmentally unsustainable.

Animal husbandry, which could be part of the rich diversity of smallholder farms, if properly conducted, may constitute an interesting alternative to this degradation of the environment by root crops. The production of grasses and fodder shrubs for the controlled breeding of goats and milk production in the mountains for example, can help improve the overall profitability of family farms and help them recapitalize. Interventions in agriculture in mountainous areas are a prerequisite to protect the productive capacity of the plains. The family farm, if it is modernized and well-regulated can be cost-effective, competitive, environmentally responsible (sustainable) and more socially equitable.

**Background** Livestock is the main savings vehicle of 800,000 to one million small family farms, which employ more than 50% of the labor force in the country and account for more than 60% of the population. For example:

- Pigs on over 30% of farms  
  (more than one million head)
- Cattle on over 55% of farms  
  (about 1.5 million head)
- Goats on over 65% of farms  
  (about 2.5 million head)
- Poultry on over 80% of farms  
  (approximately 4 million head)

Livestock in small family farms represent over 90% of national production. For some sectors (beef and goat) this activity meets most of the current demand. It takes advantage of a market for exports to the Dominican Republic with 50,000 goats exported annually (20% of the Dominican equivalent of two million dollars annual export plus cattle and poultry).

But for other sectors (e.g. eggs, dairy and poultry meat industry), domestic production does not satisfy the local market and is filled by large commercial imports.

- 30 million eggs per month  
  (US $20 million annually)
- 90,000 tons of milk equivalent milk products (40 million USD annual)
- Thousands of tons of chicken parts equivalent to 2.5 million chickens per month
- In addition for some species there is a potential production value. For example, there are approximately 500,000 adult cattle on all farms, which in theory (potential of over 100,000 tons annually) could meet the current demand of dairy products, but that lack of infrastructure for processing and marketing can benefit from a market currently filled to 80% by commercial imports (90,000 metric tons).

The program will focus on the following strategic elements:

- support for diversified farming systems of small family farms
- support for investment in the breeding of semi-intensive cultivation of grain (maize sorghum) tubers (cassava),
- the development of commercial and productive alliances between different categories of economic agents (farmers, processors, traders, input suppliers)
- The integration of farming activities in a development plan of all available agricultural resources.
- adding value in rural areas, particularly in developing the processing of livestock products (milk and meat)
- protecting and improving our environment by promoting farming systems that make a sustainable exploitation of natural resources in mountain
- income for all segments of society especially for those often neglected, such as youth, women and persons with disabilities. [*Figure 33*]

**Tourism** A pioneer in the Caribbean tourism market, Haiti's tourism has suffered a steep decline over the past 30 years due to political instability. Haiti was among the first
Caribbean islands to open to the burgeoning post-World War II American tourist market. During the ensuing decades, many major international chains invested in properties in the country, making one of the premiere destinations in the region. The current situation of the sector is very different. Although most, if not all, of the basic tourism resources still exist such as the Citadelle, the stunning beaches of the South and Southwest, and certain investments on the Archides Coast, lack of tourist traffic and revenues has led to a decapitalization of the sector and a deterioration of the tourism products.

Major opportunities exist to upgrade the tourism sector. Given the wide variety of natural and cultural experiences available in the different regions of Haiti, there is a significant opportunity to develop high-quality, differentiated products to compete against the typical “Sun & Sand” packages offered by Haiti’s regional competitors. Two examples of this type of high-value experience are an “African Discovery” product focused around a circuit in the north anchored by the Citadelle and Cap Haitien’s 300 year old historic district. This product could easily be pitched to the 4,000 “cruisers” brought

<table>
<thead>
<tr>
<th>Job Creation</th>
<th>Poultry / Eggs</th>
<th>Cattle / Dairy</th>
<th>Pig</th>
<th>Goat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential to directly impact the 750,000 family units already owning at least one chicken.</td>
<td>Potential to directly impact the 240,000 family units already owning at least one cow.</td>
<td>Relatively small current rearing base, with only xx estimated families owning a pig. In the short and medium term, expansion would be slowed by this small base.</td>
<td>Relatively small current rearing base, with only xx estimated families owning a goat. In the short and medium term, expansion would be slowed by this small base.</td>
<td></td>
</tr>
</tbody>
</table>

**Rapidly Implementable at the Family Unit Level**

Significant local experience exists in poultry. Small-scale poultry élevage solutions exist for as little as 30 chickens at a time. Clear migration path from backyard chicken to small-scale commercial production (30-300 chickens) to larger scale production in the medium to long term. Reliable poultry feed distribution systems must be established, along with vaccination systems.

Cattle alone can be reared rapidly, however, dairy requires the building of dairy processing centers costing $150,000 each. This upfront cost could slow a larger-scale launch process that would impact over 50,000 families.

In the short and medium term, expansion and improved productivity would be slowed by the currently small rearing base.

**Import Substitution**

Haiti currently imports approximately 1 million eggs and hundreds of thousands of pounds of chicken per day from the DR. If chicken feed distribution and vaccination is properly lined up, Haiti could reduce its import of eggs from the Dominican Republic by 50% in 2-3 years. This would require the rearing of 500,000 hens per year.

Almost 100% of Haiti’s dairy products are imported. With the construction of 20 dairy processing centers per year, Haiti could reduce its dairy import by approximately 5-10% within 3 years.

Haiti is currently importing very small quantities of Pig.

Haiti is currently importing very small quantities of Goat.

**Quantitative Analysis**

(considering all criteria)

| Score of 2.06 | Score of 1.88 | Score of 1.95 | Score of 2.03 |

**Qualitative Analysis**

Of particular note is the existence of a strong receptivity to poultry élevage in Haiti at the moment. This stems partially from a collective memory of Haiti’s historical successes in Poultry.

Many are excited about dairy production in Haiti, and investments have been secured to develop approximately 10 dairy processing centers. There seems to be some hesitance to finance further development. The cattle x-factor is that they give a farmer sufficient collateral such that he can borrow credit.

The x-factor for pigs is similar to that of cows: pigs can act as collateral for credit.

There is little current receptivity to goat rearing.
to Labadie every week by Royal Caribbean, tourists looking to “add-on” Haiti from nearby Dominican Republic, or African-Americans with an interest in history. The second compelling product is a “Wild Coast” product focused around the southern destinations of Les Cayes/Ile a Vache and Port Salut. These undeveloped and undiscovered regions of Haiti would need to propose a much more exotic product to tourists looking for something more than the all inclusive packages of the DR or Jamaica. Finally, a huge opportunity exists to tap into the estimated 1.5 million Haitian Diaspora who come to the country every year.

These opportunities translate into a preliminary vision for Haiti’s tourism sector: Haiti will be the destination of choice for travelers looking for cultural and natural excursions unmatched by its regional competitors. The country’s diversity of landscapes and rich history provides the base for a broad portfolio of high-value experiences that can be marketed to customer segments looking for the last undiscovered frontier in the Western Hemisphere …

The critical performance metric to watch in tourism is yield or the total revenue per tourist, not arrivals. A critical mistake often made in gauging performance of a country’s tourism industry is looking at the number of arrivals only without also taking into consideration the attractiveness of these customers or the yield. [Figure 34]

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**Actions Prioritaires**

**Operational Efficiency (Volume)**

- Upgrade the Citadelle product with a road from Labadie and safety improvements.
- Simplify border crossing procedures for tourists wishing to cross from DR to Haiti.
- Establish a Tourism Guarantee Fund to facilitate access to finance for Haitian tourism operators.
- Target foreign investors with the skills and capital to build appropriate facilities for Haiti’s desired tourists.
- Create a zoning plan for key tourism areas to avoid “bad” development.

**Strategy (Price)**

- Develop a national tourism strategy to target key customer segments willing to pay a premium for unique Haitian experiences.
- Upgrade the Citadelle product with a road from Labadie and safety improvements to increase yields from the Royal Caribbean “cruisers”
- Organize a “FAM” trip to bring key tour operators from the U.S., Europe and regional destinations to sell Haiti.
Rwanda could be a guide for Haiti’s tourism sector. In 1994, Rwanda suffered through one of the largest genocides of the 20th Century, with close to one million murdered within 100 days. Seven years later, Rwanda’s tourism industry had still not started again, with the exception of political and business travel. The idea of restarting the tourism industry was viewed as a joke, and many asked “Who would ever go to Rwanda after what happened?” The answer is, many. However, Rwanda made a critical choice as it resurrected the industry, choosing to focus on high-value tourism, instead of mass-tourism, marketing to experienced travelers through respected channel partners. Of particular note, Rwanda positioned its tourism industry as the tool to fund and protect its natural resources and environment. Rwanda wasn’t going for the numbers, but instead for the travelers willing to stay longer, spend more, and respect the environment. For further details on Rwanda’s relaunch of its tourism industry, see the case study below. [Figure 35]

Business Process Outsourcing (BPO) BPO is a nascent industry in Haiti, but one that has the ability to create dignified employment for large numbers of youth. Although there is currently only one independent BPO firm and a few other operations like Sogebank’s processing of U.S. visa forms operating in Haiti, the potential for the sector to help transform the structure of Haiti’s economy from agriculture and goods to services in the medium- to long-term is enormous. Although there are basic constraints such as telecommunications, infrastructure and the investment environment that are currently holding back the development of the sector, benchmarking of Haiti’s current geopolitical stability with other countries that have successfully harnessed BPO as a growth sector are favorable. Important factors that drive BPO market entry for a country in terms of attractiveness to foreign

Fig. 35 Case Study: Rwanda Tourism

Challenge: rebuild Rwanda’s tourism industry, post-genocide

- In 1994, Rwanda suffered through one of the world’s most devastating genocides.
- Rwanda had potentially world-class products, such as its mountain gorillas and its rich culture, however, post-genocide, the idea of rebuilding the tourism industry was mocked.
- Prior to 1994, Rwanda’s tourism industry focus was on low pricing to attract visitors.

Solution: focus on high-value tourism

- A key component of the strategy was to focus less on attracting large numbers of visitors, but instead to focus on spend per day and length of stay.
- Rwanda moved to build one world-class “anchor” product (mountain gorillas), through capacity building, joint-marketing, and community integration.
- Through market research, Rwanda identified new product opportunities and diversified its tourism experiences to include avitourism, cultural tourism, etc.
companies are: low wage base, low operational cost, high workforce availability, and workforce skill. Political and economic stability have a relatively lower influence on the buying decision of BPO clients.

There are a handful of “no brainer” and “good bet” opportunities that Haiti could pursue. Through a rigorous process of vetting opportunities in terms of their fit with Haiti’s current economic and social context and the competitive landscape, the Fondation Sogebank/USAID/CHF report identified the following opportunities as the first that Haiti should pursue:

- Contact Center Services offers end to end customer interaction management services
- Insurance Services offers transactional, middle-office and back-office processing services
- Technology Services offer IT, Web development, application testing and support services
- Document Management Services offer digitization, review and translation services

Although BPO is a sector whose impact will be felt in the medium-term, it is important to begin building a strong cluster and pilot projects to generate quick wins and a demonstration effect:

The BPO sector will accelerate the structural transformation of Haiti’s economy from agriculture and manufacturing to services through the creation of tens of thousands of jobs for the nation’s youth. Over the next 5 years, Haiti will establish itself as the multi-lingual BPO hub of the Caribbean with a wide range of services for both a domestic and international clientele base...

![Revenue Projections 2009-2012](image)

**Priority Actions**

**Operational Efficiency (Volume):**
- Prioritize the connection of the fiber optic cable to enable high quality and low cost communications with international clients.
- Customize industrial park & free zone space for use by BPO operators.
- Promote investment in the sector by educating Haiti’s banking sector and receptive foreign investors.

**Strategy (Price):**
- Identify potential clients for the two clients identified in the Fondation Sogebank/USAID report (call centers and document translation) based on Haiti’s multi-lingual and labor cost advantages.
- Establish training programs through Kata to allow the local workforce to engage first in relatively low value service delivery with a clear migration path to higher value services.

*Note: in line with a cluster approach, we have multiplied the likely case by 8 to simulate the creation of a BPO cluster vs. a single firm.*

Haiti’s BPO sector should pursue a multi-pronged opportunity strategy to create employment in both high- and low-value segments of the market. Given the current small size of Haiti’s BPO sector (less than 50 people), the sector needs private investment to build facilities and a focus on a good strategy to identify and pursue progressively higher value segments of the BPO market to support a virtuous cycle of higher wages. [Figure 36]

Jamaica’s path to BPO Success. Within the Caribbean alone, there exist a handful of BPO success stories, including Haiti’s neighbor, Jamaica. Jamaica is an interesting case study for Haiti, in that both countries have experienced devastating economic downturns and instability. The difference is in how these two countries reacted. Jamaica’s BPO industry is largely a result of a joint public and private sector vision that Jamaica be the service center for the North American market, combined with joint public and private sector investment into this vision. As an example, one of the key components, or preconditions to launching the BPO sector was fiber optic connectivity for the island. In 2006, cable companies invested $150M to bring fiber optic lines to Jamaica from the Dominican Republic. For further details on Jamaica’s path to BPO success, see the case study below. [Figure 37]

Garments Haiti’s assembly sector is currently locked into a low-value manufacturing cycle, focused primarily on developing commodity-based, low-cost T-shirts for the US market. Over the past 5 years, the average price of this commodity item has dropped 28%, further reducing margins for Haitian manufacturers. Additionally, due to the global plethora of manufacturers producing the same or similar products, buyers can easily change suppliers leaving Haiti to compete merely on price and proximity to market. With an impending minimum salary hike, and the region’s most expensive port, combined with inadequate roads and poor technological penetration, Haiti must take active steps to migrate to higher-value, non-commodity items, and full—package design, cutting and sewing solutions as a way to sidestep international price wars.

The emerging vision for Haiti’s apparel sector seeks to dramatically grow the industry by leveraging the advantages prescribed by HOPE II:

Haiti’s apparel sector will create 80,000 jobs in 3 years by leveraging the benefits of HOPE II. Key aspects of the cluster will be deep local linkages combined with high quality foreign investors who bring the skills and market contacts to accelerate the development of the sector from low-value assembly to more sophisticated products and “full package”. Sector revenues will rise to US $796 million by 2012 through a combination of exports and serving the local market...

To achieve these targets, the apparel sector must execute an action plan that boosts volume and increases productivity to support higher wages. As noted above, Haiti’s assembly sector currently plays at the bottom of the global assembly industry in terms of unit prices and sophistication. At the same time, the sector is handicapped by limited factory space and outdated infrastructure that discourages investors from expanding capacity. The graphic below demonstrates how the sector could double from its current size to US $796 million in three years. [Figure 38]

Summary, Priority Clusters The five priority sectors could generate more than
**Fig. 37 Case Study:**
BPO in Jamaica

**Challenge: building a new industry, from scratch**

- Beginning in the 1970s, Jamaica was plagued with a weak economy, based primarily on an unsophisticated product portfolio, including bauxite mining, and alumina production.
- Since the early 1980s, faced with rising inflation, Jamaica sought to implement significant structural and policy reforms to revamp the economy and support a struggling private sector.

**Solution: invest in a highly-skilled, tech-minded workforce**

- The government heavily invested in ICT training programs to build a world-class workforce of engineers and call center operatives.
- Beginning in 1991, Jamaica moves away from agriculture and towards an outward orientation of exports and Foreign Direct Investment, rooted in new trade liberalization policies and attractive international trade agreements.
- In 1998, the government laid a fiber ring around the country, and liberalized the telecommunications industry.

**Fig. 38 Growth Strategy, Garment Assembly**

**Revenue Projections 2009-2012**

- **2009 Receipts**: $130 million
- **2012 Receipts**: $796 million

<table>
<thead>
<tr>
<th>Number of Jobs</th>
<th>Number of Jobs</th>
<th>Output per Worker</th>
<th>Sales / Added Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>25,000</td>
<td>$6,200</td>
<td>$130,000,000</td>
</tr>
<tr>
<td>2012</td>
<td>100,000</td>
<td>$7,586</td>
<td>$759,000,000</td>
</tr>
<tr>
<td>Multiple</td>
<td>4</td>
<td>1.5</td>
<td>0.8</td>
</tr>
</tbody>
</table>

**Source:** ADHI and I-Trade Garment Sector Strategic Plan, CTC & OTF Group Analysis

**Actions Prioritaires**

**Operational Efficiency**

- Facilitate investment in additional industrial parks and free zones to expand the capacity of the garment sector.
- Establish an assembly sector guarantee fund and bank training seminar series to re-capitalize the domestic sector.
- Improve the business enabling environment specifically by allowing for multiple shifts, a key measure to increase job creation and improve profitability of garment factories.

**Strategy**

- Create a marketing division within ADHI to identify and target new and attractive segments for the sector.
- Target sophisticated foreign direct investors who can contribute to a demonstration effect to upgrade the sector to partially “full package”.
- Deepen the garment sector through investment into fabric, yarn and carpet production.
550,000 incremental jobs over the next 3 years. These preliminary figures of the potential economic impact that a focused approach to building Haiti’s competitiveness through a cluster approach could have.

[Figure 39]

**CROSS-CUTTING CLUSTERS**

In our experience, the growth clusters need support from cross-cutting clusters. These clusters vary between countries, but the five who would probably have the greatest impact on the productivity of clusters above are as follows:

- **Construction & Infrastructure:** specialized infrastructure such as roads, buildings, ports and irrigation systems will need to be repaired or built from scratch to allow business to happen in Haiti. A building sector focused on the needs of the lead industries will reduce the cost of these infrastructures and improve their quality.

- **Finance:** the investment and working capital required to operate a business are in short supply in Haiti. To solve this constraint, there are a number of supply and demand side interventions that can be undertaken to create a vibrant financial services market that serves the needs of SMEs.

- **Information and Communication Technology (ICT):** ICT can build the competitiveness of firms and clusters by reducing costs and enhancing revenues. In ICT, not all firms have the same needs in terms of technology. For some, a mobile phone is all that is required to unleash competitiveness while for others, sophisticated systems are required to achieve the full benefits of technology.

- **Education and Training:** investment into the skills of Haiti’s workforce is critical in ensuring that country creates the opportunities for its citizens to have dignified and high-paying jobs. The key here will be to create demand driven educational and vocational sectors that provide the skills that the priority sectors require.

This type of model requires that industry and education enter into a dialogue to ensure that the content and pedagogy of the educational system meets not only current, but future needs of Haitian firms.

- **Business Environment:** a huge complaint within the Haitian private sector and a major deterrent to foreign investors is the slow speed at which the country’s justice system operates and the red tape required to navigate the Haitian bureaucracy. Fixing the issues in this area likely require a three-pronged solution; 1) the smart use of ICT to make procedures and the courts more efficient; 2) well-trained lawyers and other professionals that can efficiently navigate the system, and 3) a mindset change at the level of the business facing institutions where they see efficiency and subsequent business growth as part of the solution to challenges Haiti faces in achieving sustainable economic growth.
<table>
<thead>
<tr>
<th>Cluster</th>
<th>Implicated Now</th>
<th>% Impacted</th>
<th>Impact-Year 1</th>
<th>Impact-Year 2</th>
<th>Impact-Year 3</th>
<th>Total</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Livestock</td>
<td>1,000,000</td>
<td>10%</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>300,000</td>
<td>Of the 1,000,000, (poultry 750k, 250k cattle) that are already implicated in livestock rearing, 10% a year will have the quality of their employment improved</td>
</tr>
<tr>
<td>Fruits and Tubers</td>
<td>650,000</td>
<td>10%</td>
<td>65,000</td>
<td>65,000</td>
<td>65,000</td>
<td>195,000</td>
<td>Of the 650,000 people who are already implicated in fruit and tuber production, 10% per year will have the quality of their employment improved.</td>
</tr>
<tr>
<td>Tourism</td>
<td>2,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>16,000</td>
<td>1 employment created for each 7 arrivals. In 2005, Haiti has 112,000 arrivals, suggested that the market should allow for at least 16,000 employment.</td>
</tr>
<tr>
<td>BPO</td>
<td>60</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,250</td>
<td></td>
</tr>
<tr>
<td>Garments / Assembly</td>
<td>30,000</td>
<td>30%</td>
<td>39,000</td>
<td>50,700</td>
<td>65,910</td>
<td>65,910</td>
<td>Considering HOPE II and FDI investments in Haiti's assembly sector, market growth of 40-50% by year is possible. As such an augmentation will be dependent on improved productivity, better training and better equipment is necessary.</td>
</tr>
</tbody>
</table>

**TOTAL 578,160**

*Fig. 39 Job Creation Potential, 5 Priority Clusters*
5. Implementing the Shared Vision—PROSPER*

INSTITUTIONAL FRAMEWORK
A new institutional framework for competitiveness is needed in Haiti. To promote the development of competitiveness requires that two inter-related elements are operate simultaneously: first, ensure that policies for private investment (the “business environment”) are developed, while at the same time emphasis is placed on the provision of direct support to the private sector (at the firm-level) to equip it with physical and social capital required to design and build great products and services. While development theory oscillates between two points, the emerging consensus is that both aspects are important and that each part taken separately is not enough. Only by addressing both a real and sustainable development of competitiveness can be done. The competitive approach emphasizes the responsibility of the private sector for leadership in competitiveness and demand that the Government creates the environment so that firms can win. [Figure 40]

Government must play its role in creating the “playing field” for Team Haiti. If the priority sectors can be seen as the “strikers” of the economic Team Haiti, the public sector (and international donors) must play the role of creating a world class field and transparent rules with which the game is played. In terms of the hard infrastructure such as energy, roads, and port facilities, a few key institutions in government could take the lead in identifying innovative public-private partnerships to use private capital to accelerate the upgrading of key economic infrastructure. However, even when this infrastructure is in place, the “soft” side of the equation in terms of management and processes must be managed. For Haiti, there is significant room for improvement for improvement from the country’s current ranking. The good news here is that with political will, these soft solutions such as archaic administrative procedures, slow port clearance and a monetary policy favorable to imports can be
both quick and low cost and create positive momentum for change. The GC in collaboration with USAID’s I-Trade Project and its new mandate to focus exclusively on such “Quick Wins” as they relate to improvements in the Doing Business indicators could make significant progress on these issues in the short- to medium-term.

PROSPER will not start from “zero”. Wherever possible, the GC will seek to leverage and accelerate efforts already underway to develop Haiti’s priority sectors. The GC and the PROSPER team will do this in two ways. First, on the process side of building the clusters, the program will integrate itself with already existing public and private sector working groups such as those at the Ministry of Agriculture, the CTMO HOPE Commission and the Northern Haiti Tourism Working Group. The second way in which the program will use existing resources is to tap into the vast existing body of knowledge in the form of studies and strategies developed for the various clusters and industries. In these two ways, PROSPER will leverage existing momentum and the investment of time and resources made by key stakeholders in Haiti. An additional element to note here is that while the GC organizes the resources required to implement PROSPER, work can progress under the existing structures. [Figure 41]

<table>
<thead>
<tr>
<th>PRIORITY CLUSTER</th>
<th>EXISTING STUDIES &amp; STRATEGIES</th>
<th>EXISTING WORKGROUPS &amp; ASSOCIATIONS</th>
<th>VALUE ADD OF PROSPER</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRUITS &amp; TUBERS</td>
<td>USAID MarChe Project Strategies</td>
<td>Ministry of Agriculture workgroup</td>
<td>Link cluster and firm-level strategies to national objectives.</td>
</tr>
<tr>
<td></td>
<td>IDB Value Chain Study</td>
<td>Association of Mango Exporters</td>
<td>Drive large-scale agriculture investment through detailed analysis &amp; mobilization of the stakeholders.</td>
</tr>
<tr>
<td>ANIMAL</td>
<td>Ministry of Agriculture</td>
<td>Ministry of Agriculture Workgroup</td>
<td>Engage the private sector in key sectors of the economy.</td>
</tr>
<tr>
<td>HUSBANDRY</td>
<td>Strategic Plans</td>
<td>LaTi Go-go</td>
<td>Articulate winning business models for the sub-sectors.</td>
</tr>
<tr>
<td>TOURISM</td>
<td>Ministry of Tourism Master Plan</td>
<td>Cap Haitien Steering Group</td>
<td>Coordinate players at the regional and national levels.</td>
</tr>
<tr>
<td></td>
<td>MarChe tourism program</td>
<td>ATH</td>
<td>Clearly define Haiti’s winning tourism experiences.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sustainable Tourism Alliance</td>
<td></td>
</tr>
<tr>
<td>BPO</td>
<td>Fondation SogeBank/USAID BPO assessment</td>
<td>Nascent industry means that there are limited players in Haiti. Sector will need to be brought to life</td>
<td>“Bring the report to life” by creating an industry workgroup.</td>
</tr>
<tr>
<td></td>
<td>ADIH/I-Trade Strategic Plan</td>
<td>CTMO Hope Commission</td>
<td>Identify strategic foreign investors to grow the industry.</td>
</tr>
<tr>
<td>GERMENTS</td>
<td>CMTO HOPE/Nathan Associates</td>
<td>KATA training activities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Value Chain Analysis</td>
<td>Soros Foundation investments</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Facilitate and coordinate activities of various actors.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Support the development of concrete business plans.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Identify and target key strategic investors to support a migration strategy.</td>
<td></td>
</tr>
</tbody>
</table>
OVERVIEW OF PROSPER’S TECHNICAL APPROACH

The Shared Vision Process must be followed by a program to implement the vision. Management guru Peter Drucker once said “plans (or visions) are only good intentions unless they quickly degenerate into concrete actions”. Haitian leaders have been quick to underline the vast number of studies and initiatives that have had no action associated with them. This lack of action likely contributes to the lack of confidence that was identified in Haitian society.

Haiti must put in place a program to implement the Shared Vision for all Haitians. Based on OTF Group’s experience implementing competitiveness programs in Rwanda and other post-conflict countries and our consultations with Haitian leaders, the GC believes that Haiti requires an integrated approach to unleash the full potential of the country, spur economic growth, and create prosperity for all Haitians. This program should have three components:

1) mindset change to promote productive attitudes towards competitiveness, 2) the development and implementation of sector strategies, and 3) facilitating action oriented public-private partnership. Michael Porter has stated that “competitiveness is a marathon, not a sprint”. With this in mind, we propose a three year program.

The Programme Stratégique pour l’Économie et la Richesse (PROSPER) will build on the learning and stakeholder mobilization of the SVP to actually develop business plans for the growth sectors and alleviate some of the key constraints faced to economic growth in Haiti. The project will be organized around three components and will be supported at an institutional level by the GC. PROSPER is designed to be a three year initiative split into two phases; a one year pilot phase and a two year optional renewal period. [Figure 42]

Details of PROSPER’s technical approach are found below.
GOAL 1: Priority Growth and Cross-Cutting Cluster Strategy Development

Enhancing the competitiveness of key local industries is about business strategy and cooperation. It involves making critical business choices, securing tangible investment commitments, and coordinating the actions of several industry-supporting players. Achieving all of this does not happen by chance. Systematic approaches are required, and OTF Group’s proprietary 5-step Cluster Development Process is such an approach. We will use this “5-Step Process” to develop five Priority Growth Cluster Strategies in conjunction with the GC and Cluster Workgroups (CWGs), [Figure 43]

At every stage of the 5-Step Process, there will be analytical and process activities. The analytical agenda consists of research and surveys conducted by OTF Group staff, our project partners, and selected members of the GC and CWGs. Once industry strategies are defined, a clearly defined process for ongoing implementation and execution (the “Action Plan”) will be developed and presented.

The purpose of Step 1, Analyze Current Situation, is to understand local and international dynamics that are inherent to a particular industry. Research is conducted and presented to the industry workgroups to help workgroup members reach a common view on the state of their industry. Key actions under this step include:
- Identify and build the CWGs around the selected industry
- Perform a Seven Forms of Capital Analysis of the industry
- Conduct an audit of local & international sector structure, players, products/services, and issues
- Research the market for these priority sectors to support preliminary hypotheses
- Perform a baseline study to inform the monitoring & evaluation (M&E) process

Step 2, Set Cluster Objectives, is about getting local industry players to quantify industry transformation goals in ways that are as specific as can be. Target export volumes and receipts for the industry reflect the strategic objectives of local industry leaders. This step in the process allows for the definition of clear goals for each of the anchor industries for which strategies will be developed. These objectives must respond to all stakeholder demands and ensure that all players are accountable. The concrete product-specific objectives that are set during this phase will guide the market research that follows in Step 3 and the targets set as part of the M&E process. Key actions under this step include:
- Build consensus on a vision for the cluster
- Select key products/segments with highest potential for Haiti
- Quantify revenue goals
- Articulate qualitative socio-economic impact

Step 3, Understand Target Customer Needs, is the most research intensive step. Primary
customer research is compiled to inform critical strategic choices. Industry workgroup members get to learn about what customers want, how to reach them, and how to serve them profitably. As local industry players get exposed to insightful customer information and get engaged in debates about what customer segment/s to serve, greater convergence of views occurs and people from the same industry who may have previously ignored each other begin to develop a productive working relationship. The market study will provide details such as the potential value, competition, margins, quality and standards. OTF Insight, our proprietary software, facilitates such research and helps us teach our clients in the process.

- Implement a comprehensive research plan including international market surveys
- Generate customer insights through detailed customer portraits
- Inform industry stakeholders how to win in each niche and customer segment
- Train willing stakeholders on market research techniques. [Figure 44]

The shift in perspective from workgroup members based on the market research helps create the conditions for Step 4, where workgroup members are asked to Articulate a Unique Positioning for their particular industry in the global marketplace. For most companies, no matter their product or service, the key long term, non-replicable competitive advantage is a strong brand. For clusters and countries, the same holds true. In this increasingly competitive world, every industry has to articulate its own differentiating factor and position itself in a unique way to attract the right mix of businesses. Key actions under this step include:

- Perform a competitor benchmarking exercise to identify differentiating factors

In 2002, the Rwanda tourism industry elaborated an exciting new vision to position the country as a high-value tourism destination. In 2007, it is clear that the strategy has mobilized the sector to action; receipts are ahead of targets, the gorilla product is well-known in the international market and perceptions of Rwanda amongst regional tourists have turned around.
Articulate a positioning and elements of a brand for the cluster
Build consensus around key differentiating and success factors for industry

By the time Step 5 is reached and industry workgroup members begin to Develop Action & Investment Plans, buy-in for what will be presented as a national industry strategy has already been secured. Operational and financial requirements needed to upgrade the competitiveness of an industry are identified. Key actions under this step include:

- Articulate recommendations on product, marketing and institutions
- Cost out recommendations through detailed action and investment plans
- Develop a cluster cash flow model to demonstrate the potential national, cluster and firm level impact of different scenarios
- Identify roles of specific stakeholders in implementing action plans
- Inform key funding partners about requirements of cluster strategy to coordinate their programming and investments
- Implement quick-win actions

The Action and Investment Plans clearly outline the roles required of each stakeholder group. The example below shows the “division of labor” between the two groups. Private sector activities are focused on investment and training, while the public sector is focused on the institutional and policy requirements of the strategies, as well as infrastructure investments, etc. [Figure 45]

Moving beyond the 5 Step Process to implementation of the strategies, the workgroups play an important role in the implementation of the competitiveness upgrade strategies. The work group serves as a continuous forum for dialogue and reflection on ongoing activities and upcoming challenges. It also serves to ensure all stakeholders remain focused on the strategy and perform the right investments. In addition, separate bodies may be developed to address specific issues, depending on the needs of the strategies. These bodies may be public sector or private sector driven. Guidelines for implementing these bodies would be included alongside our recommendations.

In the case of Haiti, the need for coordination is even more critical to ensure the effective coordination of the massive inflows of foreign assistance into the productive uses possible. The GC and OTF would promote this type of coordination through briefings to not only other USAID projects, but all relevant donor projects and agencies to focus investment where it is needed most. This type of focus and teamwork is critical if Haiti is to achieve the ambitious targets that will be set out in Step 2 of the 5 Step Process.

Support Cross-Cutting Cluster Strategic Initiatives

Once the strategies for the priority growth clusters have been developed and implementation begins, PROSPER will turn its attention to the cross-cutting or support clusters. Although the overall approach and process for addressing these sectors will vary, they will all focus on key problems faced by the priority clusters. The team will treat the solutions to the cross-cutting issues more as initiatives vs. a full strategic planning process so the time and resources required to deliver on them will be less than for the priority growth cluster strategies. The focus will be on concrete solutions, action and quick wins to help improve the environment in which firms operate.

Although all of the cross-cutting clusters will be different, it is helpful to provide an example of one previous engagement done by OTF Group in Afghanistan. As a landlocked country with archaic regulations, Afghan exporters faced high transport costs because of poor infrastructure and “soft” constraints such as onerous number of steps, certifications and other procedures required to export key products such as carpets and dried fruits. Working in
Coffee has traditionally been Rwanda’s most important export sector and one of the foremost cash crops for more than 400,000 coffee grower families prior to 1994. In the early nineties, coffee exports accounted for about 60 million US$ and 60% of total exports. In 2001, the sector was suffering its toughest crisis with exports down to 20 million US$ in 2001 and only 30% of exports. Rwanda’s coffee sector was trapped in a commodity trap (or low-quality-low-quantity loop). Through OTF Group’s 5-Step process, Rwanda’s coffee sector leaders realized the only way out of the commodity trap was to develop a coherent strategy towards high quality customer segments in the world coffee market. Rwanda’s is refocusing its coffee cluster on specialty coffees, located new distribution channels, and new target segments. Fully Washed Coffee exports increased from zero to 334 tons in 2003; and have reached 3000 tons production or $6M in receipts in 2006. Rwanda’s coffee is now sold at Starbucks. We will provide such detailed investment plans for each industry considered. Such blueprints will facilitate coordinated actions to upgrade the competitiveness of anchor industries.

Fig.45 Rwanda Coffee Strategy: A Blueprint for Competitiveness

- Upgrade capacity of coffee associations and farmers (14M)
- Replant Rwanda’s aging tree inventory using new varieties (20M)
- Carry out GIS and water supply studies to locate CWS (3.5MM)
- Place CWS in Rwanda’s top 50 coffee producing districts (18MM)
- Establish quality control systems (500K)
- Provide information on local and international coffee market (1M)
- Roll out innovative promotional / branding activities (7.5M)
- Support associations (500K)
- Strengthen OCR Café’s and ISAR’s capacity (14M)
- Provide financial framework throughout coffee chain (2M)

Total Required Investments 2003-2010: $81m
Total Projected Receipts: $580M
collaboration with the private sector and the Ministries of Commerce and Finance, the OTF team identified a solution that cut the amount of time required for these exporters to complete all of the procedures required for export. The annual time savings for the exporters at a national level was estimated in the hundreds of thousands of dollars.

**Strategy Implementation: “Quick Wins”**

Although country and industry competitiveness take years to develop, it is important for clusters to begin engaging in high priority and impact activities to make concrete steps towards upgrading the performance of these industries. In the experience of OTF, these activities generally fall into three broad categories: marketing, product development, and financing. These activities are always based on acting up on customer needs or overcoming key constraints in an industry. It is expected that other USAID EG projects such as MarChe, I-Trade, MSME Finance, and Kata will be key partners in any quick win activities undertaken by the CWGs and the PROSPER team. Examples of quick win initiatives from other projects are found in the table on page 56.

**GOAL 2: Create a culture of entrepreneurship and competitiveness**

A critical component of competitiveness lies in the flexibility of thinking and creating an “entrepreneurial culture” at the national level. Based on data and analysis from the national survey, the GC and OTF Group have developed and will implement a communications campaign to inform all sectors of society, rural people in political and business elites. Even if a few key messages are disseminated throughout the country the method of spreading the message may take various forms such as television, radio and private briefings. The following table highlights key actions, tools, and messaging to be used throughout the campaign as a way to arrive at the desired outcome of highly informed and involved segments.

The first phase of the communication campaign focuses on building a strong leadership base for change. Due to widespread lack of trust that exists in Haiti today, it is important to identify and sensitize trusted leaders, which include government members but perhaps more importantly, opinion leaders, civil society leaders, religious leaders and local leaders. The establishment of a leadership base will be accomplished through a two step process.

First, efforts will be focused on the identification and raising the awareness of key leaders in Haiti. This step will consist primarily of dialogue and training, allowing for key leaders to fully grasp concepts of productivity and competitiveness, as well as giving leaders an opportunity to find a role for themselves in the change process. Once a strong leadership base has been identified, it will be formalized through the establishment of an Ambassador Program, which will serve to harness the connectedness and influence of opinion leaders. [Figure 46]

The second phase of the communication campaign focuses on the promotion of productive mindsets vis-a-vis competitiveness. This communication will be specially tailored to different stakeholder groups, including: government, opinion leaders, press, private sector, religious groups, as well as peasant/farmer groups. Communications will also be specially tailored to reach Haitians outside of Port-au-Prince.

Key messaging and information will be pushed through posters, stickers, briefing sessions, radio, television, newspapers and memos, the Ambassador Program, as well as a new and unique information distribution network: Provincial Reach. Finally, an annual documentary film will be created to highlight the transformation process, key successes, and visions for the future.

**Capacity Building and Dissemination**

Capacity building and awareness
dissemination will be an integral part of our approach and methodology. The emphasis of the project throughout is on both formal and informal training ("on the job") to ensure that the Core Team and Working Groups understand and embrace the methodologies. Capacity building in Year 2 builds on efforts in Year 1. As with the first year, both formal (the ALCP program, seminars and workshops) and informal (information exchange and knowledge transfer with the GC and CWGs) continue to be critical parts of our process and methodology. [Figure 47]

The process of Strategy Development and launching clusters via the 5 Step Process will enable members of Haiti's leadership to translate the same methodology to other industries going forward. Targeted training on the 5 Step Process will be provided at the beginning of the year, and will be reinforced along the way through active involvement by key clients. The needs of the strategies will dictate additional, cluster-specific trainings that are required which may include study tours, market research training and business plan development.

GOAL 3: Public-Private Partnership to Improve the Business Environment
Although private firms ultimately produce and sell products and services, they need assistance to improve their operations and the support of public sector organizations and associations to improve the environment in which they operate. This section provides an overview of how the PROSPER program would provide strategic support to key institutions on an as needed basis.

Building Capacity of Support Institutions—the Competitiveness Triangle
To succeed, private firms must have the support of effective sector specific organizations to improve the environment in which they operate, encourage collaboration, and provide appropriate financing solutions. These institutions usually fall into the
following categories:

- Export or investment promotion agencies: the primary function of these institutions is to seek out new markets in which a sector’s products can be sold or to target specific “Type III” investors that can accelerate the growth of a cluster. An example of this type of institution in Haiti is the Centre de Facilitation des Investissements (CFI). The CFI already receives support from I-Trade and other international organizations, so PROSPER collaboration would need to be closely coordinated with these other interventions to avoid overlap. Given the current pre-occupation of Haiti’s leadership with the country’s Doing Business rankings, the intervention with the CFI could focus on how to accelerate improvement in this key ranking to support the country’s investment promotion efforts.

- Sector specific organizations: private sector associations or government run industry boards play a valuable role in terms of providing a voice to the private sector and supporting their needs. In Haiti, these types of organizations include the various Chambers of Commerce, ADIH, the Mango Exporters Association, and many others. Based on the needs and constraints of the priority clusters, the PROSPER program could work with a small number of these groups to build their capacity or facilitate a strategy development process.

- Financial institutions: the majority, if not all, of the priority growth clusters are relatively unknown to local financial institutions. At the same time, there must be a lead financial institution (such as SOFIHDES), that “primes the pump” and takes higher risks and designs new products to serve the needs of SMEs in the priority clusters. The PROSPER program would work with a small number of willing financial institutions to both train them on business models in the sector and potential new product offerings to serve them.

PROSPER would work closely with leaders of these institutions to identify critical support and strategic planning needs.

Support to SMEs—
Business Development Services
Haiti must unleash the submerged mass of its private sector “iceberg.” As described above, 63% of SMEs and micro enterprises in Haiti have suffered profit declines. At the same time, more than half of companies have turned to informal networks such as friends and family to help them improve their businesses and improve their strategy, because the professional services support are rare.

Business development services (BDS) are needed to unlock the potential of the private sector in Haiti. BDS is crucial for the development and growth of private enterprises, whether small or the size of an international company. BDS provides solutions to the problems that SMEs face in a professional and efficient manner. Instead of SME owners having to go through their network to identify resources to solve their problems, professional BDS providers can provide a range of standardized solutions to common problems. Even if these services are varied in terms of their implications and they vary across sectors can nevertheless be grouped into four main high level functions, namely the financing, production, organization and marketing.

Using the analysis conducted as part of Phase 1 of the SVP related to SME needs, PROSPER will design a needs based BDS strategy for the majority of Haitian firms. As with the other components of the program, this strategy will engage all relevant private and public sector stakeholders to design a solution that meets the needs of Haitian firms and then leverages the resources and capabilities of these partners to launch an integrated support program for the country’s underserved MSSEs and SMEs. Figure 48 shows an example of what the structure of a BDS network could look like. [Figure 48]

GC Leadership and Facilitation of Haiti’s
Competitiveness Agenda
The development of the connection between the public and private sectors informs the approach to Phase 2 of the shared vision for Haiti. This approach ensures that at any time and through all stages of the process the emphasis is put on a real partnership among the various segments of Haitian society. Capitalizing on the momentum created by the GC, it is necessary to consider establishing a permanent national forum for competitiveness. Although the specific mechanism needs to be studied in more detail, important elements should be considered on the basis of best international practices. Six factors contribute to the success of such partnerships. The illustration below highlights these factors.

Over the course of PROSPER OTF will work with GC to facilitate decision making and build capacity. A key success factor for a “competitiveness partnership” such as the GC is the ability to engage in “evidence based dialogue” or decision making based on solid analysis instead of politics or emotion. The importance of this is two-fold. First, it reduces the risk that the group is seen as a vehicle for the promotion of the personal interests of its members. In a relatively small society such as Haiti, this aspect is especially important. Second, decisions based on facts and rigorous analysis will yield better results in the form of economic growth and a friendlier business enabling environment.

The GC will play a critical role in managing PROSPER, OTF Group should be considered as a technical secretariat and advisor to the Haitian leaders that make up the GC. As such, the GC is there to yet the analysis and ensure that it has political buy-in, is relevant to the Haitian context, and can be implemented with the support of all GC members. Along with the USAID mission, the GC will be both a key client and beneficiary of the PROSPER team. [Figure 49]

Fig. 49 Six keys to ensuring successful public-private partnership
Source: ‘Competitiveness Partnerships—Building and Maintaining Public–Private Sector Dialogue to Improve the Investment Climate’ MIGA, Benjamin Herzberg and Andrew Wright, 2005
Conclusion

After decades of economic decline, Haiti is at a crucial crossroads in its history. Political stability and an international community that is concerned with the fate of the country provide the President of Haiti the luxury and possibly the resources to plan the future of a competitive and prosperous Haiti. At the same time, the plight of millions of Haitians requires immediate results and that timely action be taken.

To address these challenges, His Excellency President René Préval mandated the GC to 1) develop a strategic plan for competitiveness, 2) to make practical recommendations to improve the business climate in the near future.

Although concerned with a sustainable economy, Haitians are in need of immediate results. The GC has translated these aspirations into a three-pronged vision. First, the creation of 500,000 jobs in 3 years through a portfolio of growth clusters that focus on both national production and exports. Then, create jobs across the nation especially in rural areas and the SME and micro-enterprise sector. Finally, the definition of the private sector should be expanded to include SMEs while at the same time clarifying the role of government as a facilitator.

After a detailed analysis of 42 potential clusters, fruit & tubers, livestock, tourism, garment and Business Process Outsourcing (BPO) are emerging as the potential “strikers” for Haitian economy. The portfolio balances the imperatives of job creation in the short term with a structural transformation of the Haitian economy. Cross-cutting clusters—construction, finance, information technology and communication, training & education and the business environment—will support these growth clusters.

To launch this process, the GC proposes a comprehensive medium-term program to upgrade the competitiveness of Haiti through mindset change, sector strategies and action oriented
public-private dialogue to quickly create jobs and break the current inertia in which the country is trapped.

Competitiveness is a marathon. Effective implementation of these strategies will require collaboration between government, private sector and civil society. To achieve this collaboration, the GC proposes the establishment of a permanent National Forum on Growth and Competitiveness of Haiti, which will unite all segments of society to address the competitiveness challenges of the country and strengthen the high level of trust between the public and private sectors.

Prosperity is a choice. The means to transform the Haitian economy is in the hands of Haitian leaders, not the international community or foreign advisors. The nation must move quickly from the phase of discussion to action to fully exploit the opportunities available to the country. If the Haitian leaders to work together and focus their efforts on sectors and targeted in this report, the Haitian people will finally benefit from the dividends of stability and achieve the vision of a prosperous and competitive Haiti.
## Appendix 1—Reports Consulted

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<td>Haiti’s Apparel Industry: Opportunities under the HOPE Legislation</td>
<td>Association of Haitian Industries (ADIH)</td>
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<td>HOPE: Haitian Hemispheric Opportunity Through Partnership Encouragement</td>
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<td>Textiles and Apparel: Effects of Special Rules for Haiti on Trade Markets and Industries</td>
<td>US International Trade Commission</td>
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<td>Crise in the Mexican Maquila Garment Industry: Federal Problem / Regional Solutions</td>
<td>Third Horizon Limited</td>
<td>David Birnbaum</td>
<td>Aug-03</td>
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<td>Plan d’Action ADIH-MCI Textile Vendetements</td>
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<td>Regional SWOT Analysis: Central America</td>
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<td>Artisanal</td>
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<td>Coffee</td>
<td>Coffee in Haiti: The Current State of the Industry and a Lobbying Campaign to Improve the Socio-Economic Position of Growers</td>
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Appendix 2—Groups and Individuals Met

Organizations, Chambers, Mouvements, etc
Associations des Industries d’Haïti (ADIH)
Chambre Franco-Haïtienne de Commerce et d’Industrie (CFHCI)
Chambre du Commerce d’Industrie et de professions du Sud-Est d’Haïti (CCIPSEH)
Chamber of Commerce - Cap Haïti en
Chamber of Commerce - Port-au-Prince
Associations Touristiques d’Haïti
Associations Touristiques d’Haïti - Nord
Centre pour la Libre Entreprise et la Démocratie (CLED)
Mouvement Paysan de papaye (MPP)
Initiatives de la Société Civile
Catholic Church
Press
Association des Journalistes d’Haïti
Le Nouvelliste
Travel Weekly
Canal 11
Private Sector
GaMa
Capital Bank
UNIBANK
Karibé Hotel
La Villa Creole
Universités
Université Quisqueya
Université Notre-Dame d’Haïti
Government
Office of the President
Ministère du Commerce et de l’Industrie
Ministère de l’Economie et des Finances
Ministère du tourisme
Ministry of Agriculture
Ministère de la planification, coordination et de la Cooperation externe
Centre de la Facilitation des Investissements
Parlement
Direction des Zones Franches
International Organizations
U.S. Department of State
Banque Interaméricaine de Developpement
Investment - Trade & Associations on Development Project (I-TRADE)
PACT
IFC
USAID
CTMO-HOPE
CHF International
I-Trade (USAID)
Marché Project (USAID)
European Union (PRIMA Project)
Appendix 3—GC Members

COMITÉ EXÉCUTIF

Boisson, Pierre Marie  Economiste
Chaney, Michel  Médecin Vétérinaire, Secrétaire d'Etat à la production animale, Ministere d'Agriculture
Coupert, Gladys M.  Banquier, Economiste, membre du Conseil de la AMCHAM et de l'APB
Craan, Bernard  Gestionnaire, Président du Centre pour la Libre Entreprise et la Démocratie (CLED)
Garcia, Marc-Aurel  Journaliste, Entrepreneur
Mathieu Philippe  Ingénieur-Agronome
Roy, Bernard  Entrepreneur

MEMBRES

Bissainte, Frantz  Ingénieur-Agronome, Administrateur
Boulos, Reginald  Médecin, Entrepreneur, Président du Conseil National des Chambres de Commerce et d'Industrie d'Haiti
Brandt, Gregory  Entrepreneur, Président de la Chambre Franco-Haitienne
Brun, Gerald-Emile  Ingénieur, Architecte, Entrepreneur
Chery Paul Loulou  Président de la Fédération des travailleurs Haïtiens
Clermont, Charles  Ingénieur, Investisseur
Dorvil, Martin Malherbe  Entrepreneur, Président de la Chambre de Commerce du Nord
Dubois, Frantz  Ingénieur-Agronome
Durandis, Inette  Ingénieur-Agronome,
Fils-Aime, Bernard  Entrepreneur
Lequer, Pierre  Ingénieur-Agronome, Entrepreneur
Moise, Jovenel  Entrepreneur, Président de la Chambre de Commerce du Nord’Ouest
Pressoir, Lionel  Entrepreneur
Appendix 4—Terms of Reference, Shared Vision Project

PROJECT CONTEXT
This proposal is the result of years of conversations between OTF Group and various representatives of Haiti’s public and private sector. Over recent months, our discussions and meetings with representatives of the private sector and international donor community have been more concrete in terms of identifying specific clients with whom we could work and discrete engagements that OTF could deliver. This most recent round of communications culminated in a request from Haiti’s American Chamber of Commerce (AmCham) to advise them on developing a shared vision for a competitive Haiti & prioritization of sectors that can contribute to Haiti’s long-term competitiveness. OTF is pleased to present AmCham with a proposal that draws upon its deep experience from around the world in similar projects from the national, industry and firm level.

OTF Group views this engagement as a first step in a long-term relationship with Haiti. Our experience in building competitiveness has taught us that the process takes years, not months. Fostering competitiveness involves simultaneously addressing two connected areas: on the one hand, ensuring the policies and institutions required for private investment and trade (the “enabling environment”) are developed, while at the same time focusing on providing direct private sector (firm level) support to private businesses to equip them with both financial and human capital. While development theory has swung between the two, at various times emphasizing one over the other, consensus is emerging that while both are important, neither is alone sufficient, and only by addressing both can real and lasting development of the private sector actually occur. Competitiveness emphasizes the private sector’s responsibility for competitiveness leadership and calls on the government to provide space for firms to compete. Developing the connection between the public and the private sector informs our approach and ensures that at all times and

Fig.5 Improving Competitiveness through public private dialogue
through all stages of the project we emphasize the importance of public-private sector partnership (PPP). This engagement will lay the groundwork for Haiti's long-term competitiveness by beginning a process of mindset change and productive PPP.

Moving Forward—The Five Preconditions of Change

When OTF considers entering into an advisory relationship with a new country or client, we look for the presence of the Five Preconditions of Change. In the firm's long experience of designing and implementing national change processes, if these preconditions are not in place, the probability of a successful engagement with real impact on the prosperity of our clients is limited. Based on our recent experience with Haiti, we believe that most of these factors are in place. Specifically:

- Useful Tension: years of civil strife and a stagnant economy have created sufficient momentum for change
- Receptivity: although Haiti does not have a history of embracing foreigners or their ideas, our recent interaction with Haitian leaders, including AmCham, has demonstrated that there is a core of open minded people that would accept OTF's ideas.
- Moral purpose: the prevailing economic system for the past two centuries has created a huge economic under class. Certain senior public, private, and international donor leaders have now shown the willingness to embrace a model of economic growth and social equity that can create prosperity for all Haitians.
- Insight: many Haitians are familiar with the business and export opportunities available in the nearby US market. OTF can both refine this knowledge and mobilize the private and public sectors to upgrade their competitiveness and serve new customer segments.
- Leadership: most importantly, this proposal represents the next step in our very productive conversations with a cadre of private sector leaders that want to rebuild their country. This core group must be expanded to achieve maximum impact, but basis for success is there. We look forward to working with AmCham to better understand and improve Haiti's Five Preconditions and accelerate the economic transformation of the country.

Solution—a Shared Vision for a Competitive Haiti

As AmCham seeks to define its role in the Haitian economy and its value to its members and the broader Haitian private sector, it would like to first develop a road map for developing a clear road map for Haiti's public and private sectors to contribute to Haiti's re-integration into the global economy. A successful shared vision for a competitive Haiti and sector selection engagement will yield the following results:

- Clearly defined vision for Haiti based on data, not conjecture
- A handful of industries on which the private should focus its develop efforts
- A large public event that closes the project and clearly validates the process
- Commitment to actively support the National Competitiveness Council
- Recognition of the private sector's contribution to social development in Haiti
- Commitment to form an apex organization of business associations in Haiti

OTF Group's Approach—Data-Driven Stakeholder Engagement

All of OTF Group's advisory engagements have two core components; 1) rigorous analysis, and 2) active engagement and facilitation of stakeholders. The Haiti SV & sector selection project is no different. Over the course of five months, the team will simultaneously collect the data required to develop insights that can mobilize the country's private and public sectors and build
the relationships and excitement around the process to ensure broad-based support of the initiative. OTF will structure the project around a four step process outlined in the graphic above. [Figure 6]

**STEP 1 Stakeholder Engagement:** During the first weeks of the project the OTF team, in collaboration with AmCham, will make a concerted effort to meet all key stakeholders in both Port-au-Prince and the three other target provincial cities (Gonaïves, Cap Haitien & Port-de-Paix). The purpose of this initial round of meetings is two-fold: 1) begin building relationships and publicizing the SV project, and 2) testing initial research hypotheses that will form the basis of the vision and develop a long list of sectors for analysis. This first step will culminate in a project launch seminar in Port-au-Prince with key private, public and international community leaders in attendance.

**STEP 2 Research Implementation:** Given the paucity of data on the attitudes and needs of Haiti’s private sector, OTF would engage in primary market research consisting of surveys, interviews and focus groups to collect the data that the country’s leaders need to make informed choices about the key pillars of the SV, sectors with high potential, and where resources should be allocated to accelerate the development of Haiti’s competitiveness. The aim of the research is to create common ground for a discussion about the role of private businesses to contribute to the country’s economic growth and prosperity with the support of government. To create an accurate picture of Haiti’s firms, the team would target a fairly broad sample of somewhere between 150 and 250 firms* and government leaders, 15–20 interviews with business owners and public sector officials, and 2 to 3 focus groups. These numbers will be refined as OTF learns more about the size and composition of Haiti’s private sector. This effort is roughly in line with similar recent engagements in Rwanda where we are completing a 1,000 firm investment climate survey, our Afghanistan business challenges survey included 205 respondents, and our communications campaign for Burundi’s coffee sector comprised 262 respondents from all levels of the value chain. Based on OTF’s long history of advising senior leaders has taught us that there are three components to an SV; 1) productive “Mental Models”, 2) understanding of constraints in the business enabling
environment (BEE), and 3) SME support needs (BDS). This research and analysis would be accompanied by stakeholder engagement and outreach to ensure validation of the vision at the end of the process. This concept is illustrated in the diagram below with further explanation of the three components following. [Figure 7]

Component 1, Mental Models: Success in competitiveness success requires both ‘doing’ and ‘thinking’ differently. OTF Group’s research in more than 25 nations demonstrates that the prosperity of a nation is strongly dependent upon the mental models (attitudes and beliefs) of its economic actors. The primary objective of creating a culture of competitiveness is to change attitudes towards wealth creation, competition, and the respective roles of the public and private sectors. The results of this analysis typically yield four “voices” in any industry or broad private sector. An example of these four segments and the personalization in the form of characters who personified these points of view is below. An understanding of these segments allows for the development of customized communications campaigns that promote pro-competitive behavior for all target audiences.

Component 2, Business Enabling Environment: according to Michael Porter, government should do all it can to allow the private sector to succeed, with the exception of impeding competition. A major implication of this idea is that Haiti’s private sector must 1) define the binding constraints that hinder the growth of private firms, and 2) advocate the government with a single voice to both engage in “quick wins” to fix the easy problems while beginning to address longer-term and usually more expensive issues such as large infrastructure projects or land reform. This type of intervention is coming at an ideal time as many international donors are working closely with government to program funds for infrastructure developments.

Fig. 7 Three Components of a Shared Vision
Fig. 8 Four Faces of Burundi’s Coffee Sector

Fig. 9 Satisfaction with the Business Enabling Environment (BEE): Afghanistan

and institutional improvements that improve the competitiveness of private firms. The ability of the private sector to contribute to these conversations and negotiations could be a first and critical step towards building a true shared vision and working partnership with the government and the international community. An example of this type of prioritization based on data from Afghanistan is below. [Figure 8, 9]

Component 3, Business Challenges: the final component of the vision is defining what type of business development services (BDS) are required to enable firms, especially SMEs, to succeed. As the backbone of most economies, SMEs create jobs, drive innovation, and promote rich competition among large numbers of small firms. This component of the vision will help the government, AmCham and other private sector apex organizations prioritize the support needs of its member firms and Haiti’s private sector in general. Logical next steps for the use of this data would be revisions to trade and industry policy, the creation of a BDS network, the facilitation of BDS markets in Haiti or the strategic use of business incubators to accelerate private sector development. A similar prioritization from OTF’s work in Rwanda is below. [Figure 10]

Sector Selection: the three components described above will form the basis of a road map that can be used by Haiti’s leadership to structure and prioritize advocacy activities directed at the government. To make the end analysis even more relevant to key industries, OTF would also engage in a sector selection exercise that would
1) identify priority sectors that the private sector believes can most easily become competitive and contribute to Haiti’s economic growth, and
2) identify binding constraints to developing this industries and solutions designed to remove these obstacles through productive dialogue and collaboration between the public and private sectors. The choice of anchor industries or which sectors to prioritize requires careful consideration based on three broad factors:

- Leadership—Do key individuals exist to lead cluster development activities? Can leadership gaps be addressed through partnership and local capacity building?
- Strategic Potential—Does growing market
potential exist for the cluster? Does the cluster leverage/build on unique capabilities?

- Impact on Prosperity of Haiti—Does the cluster create high and rising wage opportunities for residents? Do the cluster activities improve/preserve social and environmental conditions in Haiti? The exact framework for the prioritization exercise will be developed in tandem with AmCham and other key stakeholders, but metrics will likely cover a range of indicators, including export growth, employment growth, investment, productivity growth, and profit growth. Two examples, drawn from other recent OTF Group engagements, are shown below. [Figure 11, 12]

Populating the framework will be achieved through a combination of primary and secondary research. Throughout the process of sector selection, we will be highlighting several key messages that we know from past experience are important to emphasize:

- Choosing sectors is not about “picking winners”, it is about ensuring focus: Successful development is about making the right choices and allocating scarce resources to the right place. In an ideal world, industries would not have to be selected; all could be the focus of intense effort. But in reality, with scarce resources, choices must be made. Managing the messaging around the choices is essential to ensure an inclusive and collaborative approach.

- Selection of core industries for growth does not exclude other industries: A sector selection exercise, done in the wrong way, may generate accusations of favoritism. A careful calibration of the process and expert facilitation is required to ensure that the ultimate decision around 3 core industries does not exclude other industries from participating, while sending the message that the methodology employed will benefit other industries and other activities.

**STEP 3 Articulate a Shared Vision & Select Priority Sectors:** the research effort described above will yield large volumes of data. This information will be analyzed by the OTF team and integrated with best practices from other OTF projects to create a new shared vision for Haiti’s that draws a clear and prioritized road map for partnership between the private sector and government, developing the skills of the private sector to compete in global markets, and
most importantly engaging in activities to promote pro-innovation mindsets. At this point, a draft prioritization of sectors will also be developed in presented in a format similar to that found above with the supporting analyses. The two deliverables from this step will be a draft presentation and report ready for the validation and outreach activities in Step 4. These documents will be finalized during Step 4 based on input from stakeholders during individual briefings and group events.

**STEP 4 Validate & Disseminate the Vision:**
the final phase of the SV engagement is critical to ensuring that implementation of the vision in terms of concrete actions by the private sector, relevant government agencies, and international donors begins quickly. Once the analysis and report drafting are complete, the OTF team will engage in an intense period of one-on-one consultations with key stakeholders in all 4 cities to ensure validation and “buy-in” to the strategy. Once these preparatory meetings are complete and individual feedback is incorporated into the final product, OTF will facilitate AmCham sponsored seminars in the 4 target cities to both achieve public validation of and publicity for the vision. The desired outcome of the meetings and seminars is momentum around the new SV and the key role the private sector and government must play in building Haiti's competitiveness in global markets.
Appendix 5—GC’s Mandate

Quand et pourquoi a été créé le Groupe de Travail sur la Compétitivité ?
En janvier 2009, un groupe d’entrepreneurs concernés a proposé au Président René Préval de réfléchir et proposer des solutions pour changer la donne et répliquer le succès obtenu par le Rwanda. Le Président a accueilli avec enthousiasme cette proposition, en formalisant et en élargissant le Groupe vers les secteurs public et syndical, mais aussi vers la province.
Le Groupe Compétitivité s’est engagé à livrer un plan Stratégique sur la compétitivité d’Haïti.

Qui sont les 20 personnes qui le composent ?
Formé d’industriels autant que d’agronomes, intégrant plusieurs économistes, un journaliste, des ingénieurs, des professionnels du secteur public ou privé, des représentants de la province comme de Port-au-Prince, des femmes et des hommes motivés, rassemblant des expériences diverses, en Haïti, dans la diaspora ou à l’international, le Groupe de Travail sur la Compétitivité est unique en son genre.

Les membres sont-ils rémunérés ?
Non, les membres sont tous bénévoles.

Avec quelle régularité se réunissent-ils ?
Le Comité exécutif se réunit toutes les deux semaines. Le Groupe Compétitivité est au complet une fois par mois.

Comment est structuré le groupe, les sous-groupes ?
Le Groupe Compétitivité est constitué d’un Comité Exécutif et de membres.
Plusieurs sous-groupes ont été créés pour travailler spécifiquement sur certains domaines ou secteurs, notamment sur les « Quick Wins », l’Agriculture, le Salaire Minimum ou la Communication. La participation à des sous-groupes est déterminée par l’expertise dans les domaines en questions. Par exemple pour le sous-groupe Agriculture, les membres possèdent une expérience significative dans les aspects commerciaux, productifs ou sociaux de l’agriculture.

Combien de temps doit durer la mission du Groupe Compétitivité ?
A partir de quel budget fonctionne le Groupe Compétitivité pour réaliser sa mission ?
Le Groupe Compétitivité a obtenu un financement de 331,000 USD pour engager la firme OTF, spécialisé dans la Compétitivité, indispensable allié de notre réussite. Ces fonds se répartissent comme suit :
- 81,000 USD du secteur privé
- 150,000 USD de la Banque Interaméricaine de Développement
- 120,000 USD de I-Trade
- 16,000 USD additionnels ont été débloqués par le secteur privé et la BRH (à hauteur de 5,000 USD) pour les frais de fonctionnement.
- Aucune dépense du Groupe Compétitivité n’est prise en charge par le budget de l’Etat.

Quelle méthodologie applique le Groupe Compétitivité pour réaliser ses objectifs ?
Le Groupe Compétitivité a retenu l'expertise de OTF Group pour bâtir un plan de compétitivité, c'est le projet de Vision Partagée qui utilise une approche à trois volets (les 3 A : Analyse, Action, Attitudes) qui combinerà une recherche et analyse de qualité, des activités concrètes (les « Quick Wins ») et un changement de mentalité, pour créer une vision partagée et convaincante pour le futur d’Haïti.

Sondage sur la Compétitivité d’Haïti

Les résultats seront agrégés de manière anonyme puis partagés avec les participants de ce sondage. Ce sondage prendra au maximum 40 min à compléter. Veuillez répondre selon les instructions propres à chaque question.

<table>
<thead>
<tr>
<th>Nom de la Personne Interviewée</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nom de la Firme ou de l’Organisation</td>
</tr>
<tr>
<td>Coordonnées</td>
</tr>
<tr>
<td>Adresse Electronique</td>
</tr>
</tbody>
</table>

Initiateur de l’enquête
F/1
# d’enquête
1. LE RÔLE DES LEADERS DANS L’ÉCONOMIE HAÏTIENNE

Qui devrait prendre le leadership pour assurer la prospérité des citoyens haïtiens?
1. Le gouvernement
2. Les syndicats
3. Le secteur privé
4. Les agences internationales
5. La population en général
6. Autre: ______

Veuillez indiquer votre accord ou désaccord avec chacune des phrases suivantes. Encerclez le chiffre approprié pour chaque ligne.

SOYEZ LIBRE D’UTILISER L’ECHELLE ENTIERE
1 “pas d’accord du tout”
2 “pas d’accord en général”
3 “plutôt pas d’accord”
4 “ni d’accord ni pas d’accord”
5 “plutôt d’accord”
6 “d’accord en général”
7 “complètement d’accord”
DK “je ne sais pas”

LES POLITIQUES DU GOUVERNEMENT D’HAÏTI DEVRAIENT...

<table>
<thead>
<tr>
<th>Politique</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redistribuer la richesse des plus aisés aux moins aisés</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>DK</td>
</tr>
<tr>
<td>Encourager le contrôle direct de certaines entreprises</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>DK</td>
</tr>
<tr>
<td>Se concentrer sur des politiques qui appuient le Secteur Privé</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>DK</td>
</tr>
<tr>
<td>Traiter toutes les provinces de la même manière</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>DK</td>
</tr>
<tr>
<td>Prioriser la promotion des exportations</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>DK</td>
</tr>
<tr>
<td>Prioriser la substitution des importations</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>DK</td>
</tr>
</tbody>
</table>
## 2. OPINIONS SUR L’ÉCONOMIE ET LES AFFAIRES EN HAÏTI

<table>
<thead>
<tr>
<th>Proposition</th>
<th>Échelle de 1 à 7</th>
<th>Options disponibles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le gouvernement et le secteur privé ont une vision commune pour Haïti</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Dans cinq ans, la majorité des entreprises haïtiennes seront beaucoup plus compétitives sur le marché mondial que maintenant.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Dans cinq ans, le citoyen haïtien moyen aura une meilleure qualité de vie qu’aujourd’hui.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Il existe une grande confiance entre le gouvernement et le secteur privé.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Le secteur privé d’Haïti est réticent au changement.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Le secteur public d’Haïti est réticent au changement.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Les entreprises privées ont les compétences nécessaires pour jouer leur rôle dans la prospérité d’Haïti.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Les responsables du gouvernement ont les compétences nécessaires pour jouer leur rôle dans la prospérité d’Haïti</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Le pays en voie de développement, l’accès à la main d’œuvre bon marché et aux ressources naturelles est la clé de la compétitivité internationale.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Le Gouvernement d’Haïti devrait subventionner certains secteurs rentables.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
<tr>
<td>Les leaders haïtiens sont capables d’influencer les agendas de développement international des bailleurs.</td>
<td>1 2 3 4 5 6 7</td>
<td>DK</td>
</tr>
</tbody>
</table>
Pour les cinq prochaines années, Haïti a besoin de plus de... (Par exemple, encerclez «1» si vous pensez qu’Haïti a besoin seulement de l’aide humanitaire, ou encerclez «7» si vous pensez qu’Haïti a besoin seulement d’un développement durable)

Aide Humanitaire — 1 2 3 4 5 6 7 — Développement durable

ex. nourriture, logement, etc. ex. institutions, formation, etc.

De manière générale, pensez-vous qu’on peut faire confiance à vos concitoyens ou qu’on ne saurait être trop précautionneux en traitant d’affaires avec eux?
— Peut faire confiance
— Ne saurait être trop précautionneux

Comme pour les questions précédentes, veuillez indiquer votre accord ou désaccord avec chacune des affirmations suivantes. Encerclez le chiffre approprié pour chaque ligne.

SOYEZ LIBRE D’UTILISER L’ECHELLE ENTIERE
1 “pas d’accord du tout”
2 “pas d’accord en général”
3 “plutôt pas d’accord”
4 “ni d’accord ni pas d’accord”
5 “plutôt d’accord”
6 “d’accord en général”
7 “complètement d’accord”
DK “je ne sais pas”

Les dirigeants qui n’arrivent pas à améliorer les rendements d’une entreprise pendant une année devraient être remplacés. 1 2 3 4 5 6 7 DK

Le Gouvernement d’Haïti devrait réguler les prix dans certaines industries. 1 2 3 4 5 6 7 DK

Quelques entreprises Haïtiennes donnent trop de formation à leurs employés. 1 2 3 4 5 6 7 DK

Le Gouvernement d’Haïti devrait traiter équitablement les entreprises étrangères et locales. 1 2 3 4 5 6 7 DK

Le Gouvernement d’Haïti n’a pas le luxe de réfléchir sur une économie durable; nous avons besoin de résultats immédiats. 1 2 3 4 5 6 7 DK
Beaucoup d'entreprises se contentent simplement d'imiter leurs concurrents et de profiter de leur succès.

Le Gouvernement d’Haïti devrait imposer des taxes substantielles pour l’importation dans certaines industries clés.

Le Gouvernement d’Haïti devrait être propriétaire ou devrait directement contrôler certaines entreprises.

Les entreprises individuelles ne peuvent pas être compétitives avec de faibles conditions économiques.

Le citoyen moyen peut avoir une influence sur les décisions du gouvernement.

Les compagnies qui partagent beaucoup d’information entre elles perdent de leur compétitivité.

Lorsque possible, les compagnies devraient organiser des séances de formation conjointes avec leurs concurrents.

A court terme, la pollution et la dégradation environnementale sont des prix acceptables à payer pour une croissance économique rapide.

Le citoyen moyen a un impact sur l’environnement

Les hommes sont mieux qualifiés que les femmes pour réussir dans certains postes d’une organisation haïtienne.

Le gouvernement a en tête les meilleurs intérêts des Haïtiens

Mon pays aura toujours beaucoup de corruption

Tous les segments de la population doivent arriver à un consensus sur la vision d’Haïti avant que le pays aille de l’avant.

Il est possible que les compagnies haïtiennes collaborent et rivalisent en même temps.

Les pays ne peuvent pas être en quête de croissance et d’équité en même temps

La présence de compagnies étrangères aura un effet négatif sur la culture haïtienne
Les entreprises haïtiennes ne peuvent pas se protéger des fluctuations mondiales dans les prix des denrées.

Sans le soutien des organisations étrangères, il sera difficile pour les entreprises haïtiennes d’avoir du succès dans les marchés régionaux ou les marchés mondiaux.

Le Secteur Privé d’Haïti a en tête les meilleurs intérêts des Haïtiens.

Les secteurs les plus susceptibles d’apporter un développement économique en Haïti au cours des 5 prochaines années sont (Sélectionnez 2):

- Assemblage/Textile
- Fruit
- Aquaculture
- Elevage
- Construction
- Tourisme
- TIC/Télécommunications
- Artisanal/Musique
- Banque/Finance
- Riz
- Café
- Cacao
- Industrie Canne
- Autre _______

Veuillez décrire, dans vos propres mots, une situation où le secteur public et le secteur privé ont travaillé ensemble avec succès (100 mots ou moins):
3. CLIMAT DES AFFAIRES

Quelle est l'importance des facteurs suivants sur la croissance des affaires au cours des prochaines années?

SOYEZ LIBRE D’UTILISER L’ECHELLE ENTIERE
1 “pas du tout un problème”
2 “pas un problème en général”
3 “plutôt pas un problème”
4 “neutre”
5 “plutôt un problème”
6 “un problème en général”
7 “un grave problème”
DK “je ne sais pas”

<table>
<thead>
<tr>
<th>Facteur</th>
<th>1 2 3 4 5 6 7</th>
<th>DK</th>
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<tbody>
<tr>
<td>Demande locale pour votre produit ou votre service</td>
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<tr>
<td>Compétition avec d’autres entreprises locales pour la clientèle</td>
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</tr>
<tr>
<td>Compétition avec les entreprises étrangères pour la clientèle</td>
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<tr>
<td>Règlements de la Douane et du Commerce</td>
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<td>Code du Travail</td>
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<td>Force de travail non éduquée</td>
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<tr>
<td>Accès aux prêts et leurs coûts pour les entreprises</td>
<td></td>
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<tr>
<td>Taux fiscaux</td>
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<tr>
<td>DGI</td>
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<td></td>
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<tr>
<td>Incertitude des politiques économiques et régulatrices</td>
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<tr>
<td>Procédures d’obtention de licence et de permis de travail</td>
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<tr>
<td>Politique et règlements sur l’environnement</td>
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<td></td>
</tr>
<tr>
<td>Règlement de conflit et arbitrage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fonctionnement des Tribunaux</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crime</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corruption</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accès à l’Electricité et coût</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accès à l’Eau et coût</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accès au Transport et coût</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accès aux Télécommunications et coût</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disponibilité foncière et coût</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Coût de la valeur ajoutée aux produits 1 2 3 4 5 6 7 DK
Autre—veuillez spécifier ____________ 1 2 3 4 5 6 7 DK

**CRÉDIT ET INVESTISSEMENT (SECTEUR PRIVÉ SEULEMENT)**
Quelle est l’importance des facteurs suivants à l’accès au crédit? Veuillez utiliser la même échelle que la sections précédentes.

<table>
<thead>
<tr>
<th>Facteur</th>
<th>Échelle 1 2 3 4 5 6 7 DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taux d’intérêt</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>Manque de gage (garantie pour le prêt)</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>Manque d’un plan d’affaire détaillé ou d’un plan d’investissement</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>Manque de compréhension des affaires de la part des banques</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>Manque d’information sur les produits financiers disponibles</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>Disponibilité limitée de crédit-bail</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>La compagnie a dépassé sa limite de crédit</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>Taux d’intérêt exorbitants demandés par les prêteurs</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
<tr>
<td>Autre—veuillez spécifier ____________</td>
<td>1 2 3 4 5 6 7 DK</td>
</tr>
</tbody>
</table>

Quelles sources de financement avez-vous utilisées pour financer votre entreprise? (Secteur Privé Seulement)

<table>
<thead>
<tr>
<th>Source de financement</th>
<th>Veuillez cocher toutes celles que vous avez utilisées</th>
<th>Quel est le taux d’intérêt? % P.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emprunter de l’argent des amis</td>
<td></td>
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</tr>
<tr>
<td>Groupes d’épargne</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coopératives d’épargne et de crédit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutions de micro-finance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prêts de banques commerciales</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crédit-bail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Autre—veuillez spécifier ____</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PROFIL DES PME (SECTEUR PRIVÉ SEULEMENT)

Où passez-vous le plus de temps?
___ Dans ma compagnie
___ Réunions à l'extérieur
___ Travaillant avec des partenaires
___ Légalisant des documents

Durant les 3 dernières années, les profits de ma compagnie ont:
___ Diminué
___ Sont restés pareils
___ Augmenté

Seriez-vous à l'aise à partager des informations sur vos recettes avec des conseillers externes?
___ Oui
___ Non

Les PME entendent surtout parler des opportunités de services de développement d'affaires (programmes d'assistance technique formels via:
___ Bouche à oreille
___ Radio
___ Brochures
___ Séminaires
___ Presse
___ TV
___ Je n'entends pas parler de ces services

Les PME ont entendu parler des groupes suivants qui offrent des services et une assistance technique aux entreprises:
___ SOFIDHES
___ Mathias Pierre
___ Groupe Croissance

Exportez-vous un des produits de votre entreprise?
___ Oui
___ Non

Importez-vous personnellement des produits ou du matériel brut pour votre production?
___ Oui
___ Non
Quel type de formation les PME désirent-elles le plus?
  _ Gestion Ressources Humaines
  _ Gestion des Opérations Générales
  _ Marketing
  _ Leadership/Gestion
  _ Toutes les autres formations
  _ Finance & Comptabilité

Les services d’appui aux affaires et l’assistance technique seront
la clé du succès du secteur privé haïtien
  _ Très Vrai
  _ Vrai
  _ Neutre
  _ Faux
  _ Très Faux

Voulez-vous recevoir une formation & assistance externe?
  _ Oui
  _ Non P10

Quels types d’institutions conviennent le mieux pour assister
les PME (Sélectionnez les 3 premières)
  _ Banques
  _ ONG
  _ Chambres de Commerce
  _ Hommes/Femmes d’Affaires
  _ Agences multilatérales
  _ Le gouvernement
  _ Associations industrielles

A qui demandez-vous une assistance pour améliorer
vos opérations?
  _ Amis et Famille
  _ Collègues/Associés
  _ Autres firmes professionnelles (Banques, etc.)
  _ Associations Industrielles/Chambres de Commerce
  _ Consultants en affaires
  _ ONG
  _ Organisation de recherche publique ou privée
  _ Agences d’aide internationale (ex. Banque Mondiale, USAID, etc.)
  _ Université/institutions d’éducation avancée
A qui s’adressent les hommes/femmes d’affaires lorsqu’ils/elles ont des problèmes dans leurs entreprises?

___ Epoux/Épouse
___ Vieux Amis
___ Autres hommes/femmes d’affaires
___ Fournisseurs & Clients
___ Banquiers
___ ONG
___ Gouvernement
___ Autre, veuillez spécifier

Combien d’employés avez-vous?
Ecrivez le nombre d’employés que vous avez: _______

Quel est votre revenu annuel?
___ Plus de US $1 Million
___ Entre US $500,000 et $1 Million
___ Entre US $250,00 et $500,000
___ Entre US $50,000 et $250,000
___ Moins de US $50,000

TIC (SECTEUR PRIVÉ SEULEMENT)

Combien d’ordinateurs fonctionnent dans votre entreprise? _______ Je ne sais pas

Combien d’ordinateurs fonctionnent dans votre entreprise, avec accès à l’internet? _______ Je ne sais pas

Combien de lignes téléphoniques fixes fonctionnent dans votre entreprise? _______ Je ne sais pas

Combien de téléphones mobiles ont vos employés? _______ Je ne sais pas
Que pensez-vous de la technologie et comment l'utilisez-vous dans votre vie personnelle et dans votre travail.

1 Pas du tout d'accord 7 Tout à fait d'accord

<table>
<thead>
<tr>
<th>Énoncé</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Les personnes travaillant en Haïti ont le savoir et les capacités</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>nécessaires pour utiliser la technologie de manière effective.</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>La technologie est un outil important de développement.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>L'internet n'est pas important pour moi dans mon travail quotidien.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>L'internet vaut son coût.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

Veuillez décrire, dans vos propres mots, ce que vous pensez qu’Haïti sera dans 10 ans (100 mots ou moins):
4. LA DIASPORA HAITIENNE

Comme pour les questions précédentes, veuillez indiquer votre accord ou désaccord à chacune des affirmations suivantes. Encerclez le chiffre approprié pour chaque ligne.

**SOYEZ LIBRE D’UTILISER L’ECHELLE ENTIERE**
1 “pas d’accord du tout”
2 “pas d’accord en général”
3 “plutôt pas d’accord”
4 “ni d’accord ni pas d’accord”
5 “plutôt d’accord”
6 “d’accord en général”
7 “complètement d’accord”
DK “je ne sais pas”

| Je partage souvent des idées d’affaires avec les amis et la famille dans la Diaspora Haïtienne | 1 2 3 4 5 6 7 DK |
| La Diaspora Haïtienne devrait servir principalement de source de transfert d’argent en Haïti | 1 2 3 4 5 6 7 DK |
| La Diaspora Haïtienne représente un grand potentiel de marché pour les exportations haïtiennes | 1 2 3 4 5 6 7 DK |
| Le lien avec la Diaspora Haïtienne est principalement familial et informel | 1 2 3 4 5 6 7 DK |
| Le lien avec la Diaspora Haïtienne offre des opportunités de partenariats d’affaires, relations commerciales et transferts d’information | 1 2 3 4 5 6 7 DK |
| La Diaspora Haïtienne devrait jouer un rôle plus important dans le processus de développement économique d’Haïti | 1 2 3 4 5 6 7 DK |
| Les membres de la Diaspora Haïtienne demandent plus d’information sur les opportunités d’investissement en Haïti | 1 2 3 4 5 6 7 DK |
| Plusieurs membres de la Diaspora Haïtienne sont prêts à investir en Haïti | 1 2 3 4 5 6 7 DK |
5. ANTÉCÉDENTS

Qu'est ce qui décrit mieux le type d'organisation pour laquelle vous travaillez ou étudiez? (Si vous travaillez pour plus d'une organisation, citez celle qui prend le plus de votre temps
  _ Gouvernement (exclure les entreprises paraétatiques)
  _ Entreprise du secteur privé
  _ Association du secteur privé
  _ Entreprise paraétatique
  _ Université
  _ La presse
  _ Organisation non gouvernementale
  _ Partenaire de développement ou bailleurs de fonds
  _ Organisations Religieuses
  _ Autre (préciser) ________

Si vous avez une entreprise, quel est le type de votre entreprise?
  _ Agriculture/Elevage
  _ Assemblage/Textile
  _ Construction
  _ Tourisme
  _ Banque/Finance
  _ Autre ________

Votre premier lieu de travail
  _ Port-au-Prince
  _ Cap Haïtien
  _ Cayes
  _ Port de Paix
  _ Jacmel

Qu'est ce qui décrit mieux votre position dans l'organisation que vous avez décrit ci-dessus?
  _ Propriétaire/Directeur/PDG
  _ Manager/Gestionnaire
  _ Professionnel
  _ Staff administratif
  _ Autre ________
Niveau d'éducation (sélectionnez le plus élevé)
  __ Primaire
  __ Secondaire
  __ Un peu d'université
  __ Diplômé universitaire
  __ Diplôme
  __ Ecole technique
  __ Autre __________

Age
  __ 20–29
  __ 30–39
  __ 40–49
  __ 50–59
  __ 60 ou plus

Sexe
  __ Femme
  __ Homme

Combien de temps avez-vous passé à l’étranger durant les 10 dernières années?
  __ aucun
  __ Moins de 2 mois
  __ 3–12 mois
  __ 1 an ou plus

Dans quel/quels pays avez-vous passé ce temps?
Résultats du Sondage sur la Compétitivité d'Haiti

Agenda

- Antécédents et Pool des Personnes Interrogées
- Attitudes et Croyances des Leaders Haïtiens
- Segments des Attitude de Compétitivité
- Climat des Affaires
- Portrait des PME
- Messages Potentiel pour la Campagne de Communication

Vision partagée pour une Haïti compétitive
Résultats du Sondage sur la Compétitivité – Antécédents des Interrogées

<table>
<thead>
<tr>
<th>Type d'Organisation</th>
<th>Niveau d'Éducation</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entreprise du Secours Privé</td>
<td>313</td>
<td>20-29</td>
</tr>
<tr>
<td>Université</td>
<td>151</td>
<td>30-39</td>
</tr>
<tr>
<td>Gouvernement</td>
<td>104</td>
<td>40-49</td>
</tr>
<tr>
<td>ONG</td>
<td>48</td>
<td>50-59</td>
</tr>
<tr>
<td>Association du Secours Privé</td>
<td>33</td>
<td>60+</td>
</tr>
<tr>
<td>Entreprise Parastatique</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Organisation Religieuse</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Partenaire de Développement</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>La Presse</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Autre</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Syndicat</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Communauté / Sociale</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Niveau d'Éducation</th>
<th>Manager / Gestionnaire</th>
<th>67</th>
<th>30-39</th>
<th>24%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Étudiant</td>
<td>78</td>
<td>40-49</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>Staff Administratif</td>
<td>98</td>
<td>50-59</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>Professionnel / Directeur</td>
<td>137</td>
<td>60+</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Propriétaire / Directeur</td>
<td>287</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Répartition Géographique

- Port-au-Prince: 382
- Grand Nord: 155
- Sud Ouest: 103
- Sud Est: 79
- Autre: 53

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, en/782
Résultats du Sondage sur la Compétitivité d’Haiti

Agenda

- Antécédents et Pool des Personnes Interrogées

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- Segments des Attitude de Compétitivité

- Climat des Affaires

- Portrait des PME

- Messages Potentiel pour la Campagne de Communication

Résultats du Sondage sur la Compétitivité d’Haiti

Syntèse

Etat d’Esprit des Leaders Haïtiens

Grande méfiance entre tous les segments de la société
- Seulement 14% des leaders pensent que le Secteur Privé devrait être le moteur de la prospérité économique en Haïti
- 58% des personnes interrogées pensent que la main d’œuvre à bon marché est la clé de la compétitivité

Climat des Affaires
- Corruption et crime sont perçus comme les premières contraintes du secteur des affaires
- Mauvaises infrastructures (électricité et accès à l’eau) sont des contraintes transversales pour tous les types d’entreprises

Portrait des PME
- La majorité des PME se débattent en Haïti et connaissent une baisse de revenus
- Les PME se dirigent principalement vers les réseaux informels d’assistance, ont très peu de connaissance des services d’assistance formels et des options de financement en Haïti
- Manque d’une main d’œuvre qualifiée comme l’une des plus grandes contraintes à la croissance économique d’Haiti

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, 1er Mai 2009, n°782
Vision partagée pour une Haïti compétitive

Qui devrait assurer la prospérité économique des citoyens haïtiens?

<table>
<thead>
<tr>
<th>En Général</th>
<th>Le Secteur Privé</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le Gouvernement</td>
<td>63%</td>
</tr>
<tr>
<td>La Population en Général</td>
<td>14%</td>
</tr>
<tr>
<td>Le Secteur Privé</td>
<td>12%</td>
</tr>
<tr>
<td>Autres</td>
<td>6%</td>
</tr>
<tr>
<td>Les Syndicats</td>
<td>3%</td>
</tr>
<tr>
<td>Les Agences Internationales</td>
<td>2%</td>
</tr>
</tbody>
</table>

- La majorité des personnes interrogées pense que le "Gouvernement" est l'agent principal de la prospérité ÉCONOMIQUE d'Haïti.
- Dans l'ensemble, seulement 12% ont sélectionné le secteur privé comme leader du changement économique en Haïti.
- Les étudiants, prochains leaders d'Haïti, sont ceux qui croient le moins dans le rôle du secteur privé comme leader du changement économique.
- 93% des personnes interrogées pensent que durant les cinq prochaines années Haïti a besoin de plus de développement durable que d'augmentation de l'aide humanitaire.

Source: Enquête Nationale sur la Compétitivité, GTI et Groupe OTIF, Mai 2009, n=792

Vision partagée pour une Haïti compétitive

Comment Haïti se superpose-t-elle contre le Rwanda et l’Afghanistan?

% divergence des résultats d’Haïti

Dans cinq ans, le citoyen moyen aura une meilleure qualité de vie qu’aujourd’hui

Dans cinq ans, la majorité des entreprises haïtiennes seront beaucoup plus compétitives sur le marché mondial que maintenant

Je peux faire confiance à mes concitoyens

Pour les cinq prochaines années, Haïti a besoin de plus de développement durable (ex. institutions, formation, etc)

Pour les pays en voie de développement, l’accès à la main d'œuvre bon marché et aux ressources naturelles est le clé de la compétitivité internationale

Les pays ne peuvent pas rechercher la croissance et l'équité en même temps

Haiti souffre peut-être d'un manque d'espoir disproportionné

Haïti est au-devant de la scène dans certains domaines

Source: Enquête Nationale sur la Compétitivité, GTI et Groupe OTIF, Mai 2009, n=792
Vision partagée pour une Haïti compétitive
Confiance et Capital Social

Il existe un manque de confiance généralisé parmi les personnes interrogées

De manière générale, pensez-vous qu'il est possible de faire confiance à vos concitoyens ou qu'ils ne sauraient être trop précautionneux en traitant d'affaires avec eux ?

<table>
<thead>
<tr>
<th>Départition des Réponses (sélectionnez une)</th>
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<tbody>
<tr>
<td>Peut faire confiance</td>
</tr>
<tr>
<td>39%</td>
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</table>

Il existe une grande confiance entre le gouvernement et le secteur privé

Distribution of Responses (1 to 7 scale) Mean

<p>| |</p>
<table>
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<tbody>
<tr>
<td>Gouvernement pense aux meilleurs intérêts des Haïtiens</td>
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<tr>
<td>D'accord (6-7)</td>
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<tr>
<td>18%</td>
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Le gouvernement pense aux meilleurs intérêts des Haïtiens

Mean

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<tr>
<td>D'accord (6-7)</td>
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<tr>
<td>26%</td>
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</table>

Le Secteur Privé d'Haïti pense aux meilleurs intérêts des Haïtiens

Mean

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<td></td>
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<tr>
<td>D'accord (6-7)</td>
</tr>
<tr>
<td>25%</td>
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</table>

Les compagnies qui se partagent de nombreuses informations perdent de leur compétitivité

Mean

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<tr>
<td></td>
</tr>
<tr>
<td>D'accord (6-7)</td>
</tr>
<tr>
<td>35%</td>
</tr>
</tbody>
</table>

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=782

Vision partagée pour une Haïti compétitive
Divergences d'opinion sur les facteurs de Compétitivité, par segment

Dans l'ensemble, les personnes interrogées dans les provinces ont de plus grandes divergences d'opinion sur les objectifs énoncés pour l’Haïti

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=782
Vision partagée pour une Haïti compétitive

Divergences d’opinion - Changement et Confiance

Le secteur public-privé a beaucoup plus de divergences d’opinion sur les questions relatives au changement et à la compétence

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=782

Accroître la Prospérité d’Haïti

Divergences d’opinion – Détermination personnelle et Espoir

Personnes interrogées dans les provinces se sentent moins capables de créer le changement et ont, par conséquent, moins d’espoir que les autres segments

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=782
### Attitudes et Croyances des Leaders Haïtiens

#### Agence et Indépendance

Les Leaders sont préoccupés par la capacité des entreprises d’Haïti d’être compétitives sur les marchés internationaux

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Les entreprises haïtiennes ne peuvent pas se protéger des fluctuations mondiales sur le prix des denrées</td>
<td>57% 12% 31%</td>
<td>3.9</td>
</tr>
<tr>
<td>Sans le soutien des organisations étrangères, il sera difficile pour les entreprises haïtiennes d’avoir du succès sur les marchés régionaux ou les marchés internationaux</td>
<td>52% 11% 37%</td>
<td>3.8</td>
</tr>
<tr>
<td>Les entreprises individuelles ne peuvent pas être compétitives avec de faibles conditions économiques</td>
<td>74% 7% 10%</td>
<td>4.9</td>
</tr>
</tbody>
</table>

D’accord (8-7) Neutre (4) Pas d’accord (1-3)

**SOURCE:** Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=762

### Attitudes et Croyances des Leaders Haïtiens

#### Vision du Futur

Il existe un énorme manque de confiance chez la plupart des leaders interrogés qui pensent qu’il y aura très peu de changement positif dans les cinq prochaines années

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (1 to 7 scale)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dans cinq ans, le citoyen haïtien moyen aura une meilleure qualité de vie qu’aujourd’hui</td>
<td>27% 16% 57%</td>
<td>2.4</td>
</tr>
<tr>
<td>Dans cinq ans, la majorité des entreprises haïtiennes sera beaucoup plus compétitive sur le marché international que maintenant</td>
<td>31% 17% 52%</td>
<td>2.5</td>
</tr>
</tbody>
</table>

D’accord (8-7) Neutre (4) Pas d’accord (1-3)

**SOURCE:** Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=762
**Attitudes et Croyances des Leaders Haïtiens**

**Le court terme**

« Si nous ne mettons pas la main à la pâte, ce sera la catastrophe » - Secteur Privé

*Choix controversé sur ce qu'il faut faire en premier. Cependant, la majorité s'accorde sur l'idée que la solution doit venir de l'intérieur et qu'elle doit être durable.*

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle de 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tous les segments de la population doivent arriver à un consensus sur la vision d'Haïti avant que le pays aille de l'avant</td>
<td>64% 5% 11%</td>
<td>5.4</td>
</tr>
<tr>
<td>Le Gouvernement d'Haïti n'a pas le luxe de réfléchir sur une économie durable; nous avons besoin de résultats immédiats</td>
<td>45% 11% 45%</td>
<td>3.7</td>
</tr>
<tr>
<td>A court terme, la pollution et la dégradation environnementale sont des prix acceptables à payer pour une croissance économique rapide</td>
<td>41% 10% 49%</td>
<td>3.3</td>
</tr>
</tbody>
</table>

Pour les cinq prochaines années, Haïti a besoin de plus de...

Aide Humanitaire (ex. Nourriture, logement, etc) 2% 50% Développement durable (ex. Institutions, formation, etc)

**SOURCE:** Enquête Nationale sur la Compétitivité, GTC et Groupe OFT, Mai 2009, n=782

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**Attitudes et Croyances des Leaders Haïtiens**

**Collaboration et Compétition**

*Les leaders pensent qu'une collaboration entre lesentreprises est possible bien que quelques-uns d'entre eux sont préoccupés par une perte "d'avantage compétitif"*

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle de 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lorsque possible, les compagnies devraient organiser des séances de formation conjointes avec leurs concurrents</td>
<td>82% 13% 25%</td>
<td>4.3</td>
</tr>
<tr>
<td>Il est possible que les compagnies haïtiennes collaborent et s'avalent en même temps</td>
<td>76% 9% 15%</td>
<td>4.8</td>
</tr>
<tr>
<td>Les compagnies qui partagent beaucoup d'information entre elles perdent de leur compétitivité</td>
<td>30% 10% 55%</td>
<td>3.1</td>
</tr>
</tbody>
</table>

**SOURCE:** Enquête Nationale sur la Compétitivité, GTC et Groupe OFT, Mai 2009, n=782
Attitudes et Croyances des Leaders Haitiens

Corruption & Crime

La corruption et les crimes sont classés comme étant les plus grands obstacles à la croissance économique d’Haïti et seulement 50% ont l’espoir qu’un changement est possible.

<table>
<thead>
<tr>
<th>Répartition des Réponses (échelle de 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corruption</td>
<td>91%</td>
</tr>
<tr>
<td>Crime</td>
<td>89%</td>
</tr>
</tbody>
</table>

Quelle est l’importance des facteurs suivants sur la croissance des affaires au cours des prochaines années?

<table>
<thead>
<tr>
<th>Pas grave (5-7)</th>
<th>Neutre (4)</th>
<th>Pas un problème (1-3)</th>
</tr>
</thead>
</table>

Il y aura toujours beaucoup de corruption dans mon pays

<table>
<thead>
<tr>
<th>D’accord (6-7)</th>
<th>Neutre (4)</th>
<th>Pas d’accord (1-3)</th>
</tr>
</thead>
</table>

36% 14% 50% 3.3

SOURCE: Enquête Nationale sur la Comptabilité, GTC et Groupe OTF, Mai 2009, n=762

Attitudes et Croyances des Leaders Haitiens

Opinions sur le gouvernement

Malgré la faible opinion des Haïtiens sur leur gouvernement, ils sentent que le gouvernement les écoute

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le gouvernement pense aux meilleurs intérêts des Haïtiens</td>
<td>20% 12% 60%</td>
<td>2.4</td>
</tr>
<tr>
<td>Les responsables du gouvernement ont les compétences nécessaires pour jouer leur rôle dans la prospérité d’Haïti</td>
<td>48% 11% 41%</td>
<td>4.0</td>
</tr>
<tr>
<td>Le citoyen moyen peut avoir une influence sur les décisions du gouvernement</td>
<td>69% 12% 29%</td>
<td>3.7</td>
</tr>
</tbody>
</table>

SOURCE: Enquête Nationale sur la Comptabilité, GTC et Groupe OTF, Mai 2009, n=762

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Attitudes et Croyances des Leaders Haïtiens

Approches somme-zéro à la création de la richesse

Plusieurs leaders pensent encore que la création de la richesse se base sur des facteurs facilement reproduisibles et sur la contribution d'une main d'œuvre de base/exploitable

<table>
<thead>
<tr>
<th>Survey Question</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beaucoup d'entreprises se contentent simplement d'imiter leurs concurrents et de profiter de leur succès</td>
<td>69% 10% 21%</td>
<td>4.3</td>
</tr>
<tr>
<td>Pour les pays en voie de développement, l'accès à la main d'œuvre bon marché et aux ressources naturelles est la clé de la compétitivité internationale</td>
<td>58% 12% 30%</td>
<td>4.0</td>
</tr>
<tr>
<td>Les pays ne peuvent pas rechercher la croissance et l'équité en même temps</td>
<td>29% 15% 55%</td>
<td>2.7</td>
</tr>
<tr>
<td>Les leaders ne semblent pas prêts à prendre des risques et à innover et se contenter de suivre ce que font les autres</td>
<td>D'accord (6-7) Neutre (4) Pas d'accord (1-3)</td>
<td></td>
</tr>
</tbody>
</table>

SOURCE: Enquête Nationale sur la Compétitivité, GTI et Groupe OFF, Mai 2009, n=782

Attitudes et Croyances des Leaders Haïtiens

Business et Culture Haitienne

Il existe peu de tension sur les questions de régulations, genre, rôles, éducation et présence étrangère.

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>La présence de compagnies étrangères aura un effet négatif sur la culture haïtienne</td>
<td>30% 11% 59%</td>
<td>3.0</td>
</tr>
<tr>
<td>Les hommes sont mieux qualifiés que les femmes pour réussir dans certains postes d'une organisation haïtienne</td>
<td>29% 11% 60%</td>
<td>2.9</td>
</tr>
<tr>
<td>Quelques entreprises haïtiennes donnent trop de formation à leurs employés</td>
<td>16% 8% 76%</td>
<td>2.0</td>
</tr>
<tr>
<td>Les leaders d’Haïti sont réceptifs à la formation et à l’éducation</td>
<td>D'accord (6-7) Neutre (4) Pas d'accord (1-3)</td>
<td></td>
</tr>
</tbody>
</table>

SOURCE: Enquête Nationale sur la Compétitivité, GTI et Groupe OFF, Mai 2009, n=782
**Attitudes et Croyances des Leaders Haïtiens**

**Le Rôle du Gouvernement**

*Les personnes interrogées veulent voir le gouvernement protéger l'environnement et faciliter les exportations au lieu de prendre ou de continuer à prendre un rôle protectionniste potentiellement improductif.*

### Politiques du gouvernement devraient...  

<table>
<thead>
<tr>
<th>Politique</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prioriser la sécurité environnementale</td>
<td>90%</td>
<td>6.3</td>
</tr>
<tr>
<td>Prioriser la promotion des exportations</td>
<td>67%</td>
<td>5.8</td>
</tr>
<tr>
<td>Le Gouvernement d'Haïti devrait subventionner certains secteurs rentables</td>
<td>80%</td>
<td>5.6</td>
</tr>
<tr>
<td>Traiter toutes les provinces de la même manière</td>
<td>76%</td>
<td>5.3</td>
</tr>
<tr>
<td>Le Gouvernement d'Haïti devrait réguler les prix dans certaines industries</td>
<td>81%</td>
<td>5.2</td>
</tr>
<tr>
<td>Se concentrer sur des politiques qui appuient le Secteur Privé</td>
<td>67%</td>
<td>4.7</td>
</tr>
<tr>
<td>Prioriser la substitution des importations</td>
<td>69%</td>
<td>4.6</td>
</tr>
</tbody>
</table>

*SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTIF, Mai 2009, n=782*

---

**Attitudes et Croyances des Leaders Haïtiens**

**Le Rôle du Gouvernement**

*Politiques du Gouvernement devraient.*

### Question du Sondage  

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le Gouvernement d'Haïti devrait imposer des taxes substantielles pour l'importation dans certaines industries clés</td>
<td>65%</td>
<td>4.5</td>
</tr>
<tr>
<td>Le Gouvernement d'Haïti devrait traiter équitablement les entreprises étrangères et locales</td>
<td>65%</td>
<td>4.4</td>
</tr>
<tr>
<td>Le Gouvernement d'Haïti devrait être propriétaire ou devrait directement contrôler certaines entreprises</td>
<td>57%</td>
<td>4.2</td>
</tr>
<tr>
<td>Redistribuer la richesse des plus aisés aux moins aisés</td>
<td>20%</td>
<td>2.4</td>
</tr>
</tbody>
</table>

*SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTIF, Mai 2009, n=782*
### Attitudes et Croyances des Leaders Haitiens
**Le rôle de la Diaspora Haitienne**

Les leaders haïtiens sont tous d'accord que sa diaspora pourrait jouer un grand rôle dans le développement du pays.

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>La Diaspora Haïtienne devrait jouer un rôle plus important dans le processus de développement économique d'Haïti</td>
<td>93% 36%</td>
</tr>
<tr>
<td>La Diaspora Haïtienne représente un grand potentiel de marché pour les exportations haïtiennes</td>
<td>83% 6% 10%</td>
</tr>
<tr>
<td>Le lien avec la Diaspora Haïtienne offre des opportunités de partenariats d'affaires, relations commerciales et transferts d'information</td>
<td>83% 6% 11%</td>
</tr>
<tr>
<td>Les membres de la Diaspora Haïtienne demandent plus d'information sur les opportunités d'investissement en Haïti</td>
<td>81% 6% 11%</td>
</tr>
</tbody>
</table>

Si la diaspora haïtienne doit jouer un rôle important dans le développement d'Haïti, elle aura besoin de meilleures informations sur les opportunités d'investissement.

### Attitudes et Croyances des Leaders Haitiens
**Le rôle de la Diaspora Haïtienne**

La diaspora haïtienne est une ressource inexploitée et actuellement liée à Haïti par des canaux informels qui dépendent du transfert d'argent.

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plusieurs membres de la Diaspora Haïtienne sont prêts à investir en Haïti</td>
<td>81% 7% 12%</td>
</tr>
<tr>
<td>Je partage souvent des idées d'affaires avec les amis et la famille dans la Diaspora Haïtienne</td>
<td>73% 7% 20%</td>
</tr>
<tr>
<td>Le lien avec la Diaspora Haïtienne est principalement familial et informel</td>
<td>72% 10% 18%</td>
</tr>
<tr>
<td>La Diaspora Haïtienne devrait servir principalement de source de transfert d'argent en Haïti</td>
<td>42% 10% 49%</td>
</tr>
</tbody>
</table>

Si la diaspora haïtienne est en effet disposer à investir en Haïti, des relations plus formelles doivent être établies avec elle.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=792
### Attitudes et Croyances des Leaders d’Haiti
#### Environnement et Développement Economique

*Plusieurs leaders voient la durabilité environnementale comme la priorité des priorités pour Haïti mais beaucoup acceptent de sacrifier l'environnement pour des avantages économiques à court terme.*

<table>
<thead>
<tr>
<th>Question du Sondage</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Les politiques de Gouvernement d'Haïti devraient prioriser la sécurité environnementale</td>
<td>90%</td>
<td>2%</td>
</tr>
<tr>
<td>Le citoyen moyen a un impact sur l'environnement</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>A court terme, la pollution et la dégradation environnementale sont des prix acceptables à payer pour une croissance économique rapide</td>
<td>41%</td>
<td>10%</td>
</tr>
</tbody>
</table>

### Attitudes et Croyances des Leaders d’Haiti
#### Culture Haitienne, Auto-Détermination & Promptitude au Changement

*Les leaders haïtiens ont un grand sens de l'auto-détermination bien que plusieurs pensent qu'en général Haïti n'est pas prêt pour un changement.*

<table>
<thead>
<tr>
<th>Auto-Détermination</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le citoyen moyen a un impact sur l'environnement</td>
<td>76%</td>
<td>5%</td>
</tr>
<tr>
<td>Le citoyen moyen peut avoir une influence sur les décisions du gouvernement</td>
<td>56%</td>
<td>12%</td>
</tr>
<tr>
<td>Les leaders haïtiens sont capables d'influer les agendes de développement international des bailleurs</td>
<td>50%</td>
<td>14%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Promptitude au Changement</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Les entreprises privées ont les compétences nécessaires pour jouer leur rôle dans la prospérité d'Haïti</td>
<td>59%</td>
<td>11%</td>
</tr>
<tr>
<td>Le secteur public d'Haïti est réticent au changement</td>
<td>59%</td>
<td>13%</td>
</tr>
<tr>
<td>Le secteur privé d'Haïti est réticent au changement</td>
<td>53%</td>
<td>11%</td>
</tr>
<tr>
<td>Les responsables du gouvernement ont les compétences nécessaires pour jouer leur rôle dans la prospérité d'Haïti</td>
<td>48%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**SOURCE:** Enquête Nationale sur la Compétitivité, GTC et Groupe CTF, Mai 2009, n=792

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Attitudes et Croyances des Leaders d’Haiti
Niveau de contentieux varie au long des différentes lignes sociologique

Bien que certains groupes démographiques semblent avoir des points de vue similaires, d’autres ont plusieurs points de divergence.

Nombre de questions partagées dans le sondage tout au long des différentes démographiques

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=782

Attitudes et Croyances des Leaders d’Haiti
7 points contentieux

Les leaders haïtiens sont partagés sur un nombre de points relatifs à l’impulsion d’un esprit compétitif

Pour les pays en voie de développement, l’accès à la main d’œuvre bon marché et aux ressources naturelles est la clé de la compétitivité internationale

Répartition des Réponses (échelle 1 à 7) Moyenne

<table>
<thead>
<tr>
<th></th>
<th>58%</th>
<th>12%</th>
<th>30%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le Gouvernement d’Haiti devrait être propriétaire ou devrait directement contrôler certaines entreprises</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Le Gouvernement d’Haiti doit être propriétaire ou devrait directement contrôler certaines entreprises

<table>
<thead>
<tr>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.2</td>
</tr>
</tbody>
</table>

Les responsables du gouvernement ont les compétences nécessaires pour jouer leur rôle dans la prospérité d’Haiti

<table>
<thead>
<tr>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.7</td>
</tr>
</tbody>
</table>

Le Gouvernement d’Haiti n’a pas le luxe de réfléchir sur une économie durable, nous avons besoin de résultats immédiats

<table>
<thead>
<tr>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.8</td>
</tr>
</tbody>
</table>

Les compagnies qui partagent beaucoup d’information entre elles perdent de leur compétitivité

<table>
<thead>
<tr>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1</td>
</tr>
</tbody>
</table>

A court terme, la pollution et la dégradation environnementale sont des prix acceptables à payer pour une croissance économique rapide

<table>
<thead>
<tr>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.3</td>
</tr>
</tbody>
</table>

La présence de compagnies étrangères aura un effet négatif sur la culture haïtienne

<table>
<thead>
<tr>
<th>Moyenne</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.0</td>
</tr>
</tbody>
</table>

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=782
Attitudes et Croyances des Leaders d’Haiti

7 points d’accord

Les leaders haïtiens sont d’accord sur un nombre de points relatifs à l’impulsion d’un esprit compétitif.

<table>
<thead>
<tr>
<th>Prioriser la sécurité environnementale</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>96%</td>
</tr>
<tr>
<td></td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prioriser la promotion des exportations</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>87%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tous les segments de la population doivent arriver à un consensus sur la vision d’Haïti avant que le pays aille de l’avant</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>84%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Traiter toutes les provinces de la même manière</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>76%</td>
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<td>5%</td>
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<td></td>
<td>20%</td>
</tr>
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<table>
<thead>
<tr>
<th>Il est possible que les compagnies haïtiennes collaborent et rivalisent en même temps</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>75%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
</tr>
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<td></td>
<td>15%</td>
</tr>
</tbody>
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<table>
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</thead>
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<td>9%</td>
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<tr>
<td></td>
<td>15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quelques entreprises Haïtiennes donnent trop de formation à leurs employées</th>
<th>Répartition des Réponses (échelle 1 à 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>8%</td>
<td>76%</td>
</tr>
</tbody>
</table>

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=782

Résultats du Sondage sur la Compétitivité d’Haïti

Agenda

- Antécédents et Pool des Personnes Interrogées
- Attitudes et Croyances des Leaders Haïtiens
- Segments des Attitude de Compétitivité
- Climat des Affaires
- Portrait des PME
- Messages Potentiel pour la Campagne de Communication
Sondage des Attitudes
Quatre segments d’attitudes existent en Haïti en termes de compétitivité

Résultats du Sondage sur la Compétitivité d’Haïti
Agenda

- Antécédents et Pool des Personnes Interrogées
- Attitudes et Croyances des Leaders Haïtiens
- Segments des Attitude de Compétitivité
  - Climat des Affaires
- Portrait des PME
- Messages Potentiel pour la Campagne de Communication
Vision partagée pour une Haïti compétitive
Défis pour les entreprises haïtiennes – En premier, Crime & Corruption

Pourcentage d'entreprises classant chaque problème comme une contrainte majeure

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe FYF, Mai 2009, n=313

Actions de Promotion des Entreprises
La corruption, le crime et l'incertitude émergent comme principales contraintes

Contraintes Transversales

- Plus de 85% des répondants identifient la corruption et le crime comme principales contraintes
- L'accès à l'électricité, l'absence de main d'œuvre qualifiée et le crédit augmentent le coût des affaires

Divergences entre les manufacturiers et les services

- En général, les services semblent plus affectés par les contraintes que les manufacturiers
- Les procédures, les tribunaux et la fiscalité sont cités comme de plus grandes contraintes pour les services

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe FYF, Mai 2009, n=313

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Accroître la Prospérité d’Haïti
Défis pour les entreprises haïtiennes, par province

Province du Sud-est dit que le fonctionnement des tribunaux représente un défi majeur; une opinion différente de celle du reste du pays.

3 Plus Grands Défis pour Sud-ouest
- Fonctionnement des Tribunaux
- Electricité
- Eau

3 Plus Grands Défis pour Port-au-Prince
- Electricité
- Eau
- Force de Travail

3 Plus Grands Défis pour Sud-est
- Force de Travail
- Electricité
- Eau

Défis des entreprises haïtiennes
Entreprises de différente taille ont différentes contraintes prioritaires

Manque d'une main d'œuvre éduquée et incertitudes politiques sont les principales contraintes pour les grandes entreprises tandis que l'accès à l'électricité sont les plus grandes pour les petites entreprises.

<table>
<thead>
<tr>
<th>Micro 0-3 employés</th>
<th>PME 3-24 employés</th>
<th>Grandes Entreprises 24+ employés</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accès à l'Electricité et coût</td>
<td>5.7</td>
<td>5.3</td>
</tr>
<tr>
<td>Accès à l'Eau et coût</td>
<td>5.3</td>
<td>4.9</td>
</tr>
<tr>
<td>Accès au Transport et coût</td>
<td>5.2</td>
<td>4.8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Micro 0-3 employés</th>
<th>PME 3-24 employés</th>
<th>Grandes Entreprises 24+ employés</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incertitude des politiques économiques et réglementaires</td>
<td>5.2</td>
<td></td>
</tr>
<tr>
<td>Force de travail non éduqué</td>
<td>5.2</td>
<td></td>
</tr>
<tr>
<td>Accès à l'Electricité et coût</td>
<td>4.8</td>
<td></td>
</tr>
</tbody>
</table>

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe GCF, Mai 2009, n=313
Défis des entreprises haïtiennes

Accès à l'électricité est un problème transversal dans tous les secteurs

Bien que la plupart des secteurs ont des contraintes similaires, ils les classifient différemment

Agriculture

Tourisme

Construction

Résultats du Sondage sur la Compétitivité d'Haiti

Agenda

- Antécédents et Pool des Personnes Interrogées
- Attitudes et Croyances des Leaders Haïtiens
- Segments des Attitude de Compétitivité
- Climat des Affaires
- Portrait des PME
- Messages Potentiel pour la Campagne de Communication
Vision partagée pour une Haïti compétitive
Portrait des PME en Haïti – Environnement des PME

- Majorité des leaders des PME passent leur temps dans leurs entreprises lorsqu'ils ne travaillent pas avec leurs partenaires à l'extérieur
- Ils pensent qu'ils sont toujours à un stade de "survie" bien qu'ils semblent être relativement ouverts à partager ce qui se passe dans leurs entreprises avec des personnes auxquelles ils ne font pas confiance

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe CTF, Mai 2009, n=313

Vision partagée pour une Haïti compétitive
Portrait des PME en Haïti – Environnement des PME

Entreprises utilisent, ou pas du tout, des réseaux informels d'informations et sont en général peu informées des opportunités de services de développement

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe CTF, Mai 2009, n=313
Vision partagée pour une Haïti compétitive
Portrait des PME en Haïti – Sources de Conseils

La majorité des leaders d'affaires demande d'abord une assistance à leur famille et aux amis. A qui demandez-vous une assistance pour améliorer vos opérations?

Les réseaux informels d'assistance dominent en Haïti et très peu d'hommes et de femmes d'affaires utilisent les réseaux formels d'assistance.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=313

Vision partagée pour une Haïti compétitive
Portrait des PME en Haïti – Besoins de Formation des PME

Type de formation souhaitée par les PME

- Marketing
- Gestion des Opérations Générales
- Tous les autres formations
- Gestion Ressources Humaines
- Finance & Comptabilité
- Leadership / Gestion

Les leaders d'affaires savent qu'ils ont besoin d'aide pour développer leurs entreprises et sont ouverts à recevoir une formation et une assistance directe en ce sens.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, n=313
Défis des entreprises haïtiennes

Accès au Crédit

Entreprises ont des difficultés d'accès au crédit dues en partie au manque d'information sur les produits financiers disponibles et les taux d'intérêt exorbitants.

- Manque d'information sur les produits financiers disponibles: 84% (11%)
- Taux d'intérêt exorbitants demandés par les prêteurs: 81% (9%)
- Disponibilité limitée de crédit-bail: 77% (12%)
- Manque de gage (garantie pour le prêt): 75% (14%)
- La compagnie a dépassé sa limite de crédit: 71% (13%)
- Manque d'un plan d'affaire détaillé ou d'un plan d'investissement: 70% (17%)

Haiti pourrait bénéficier des Fonds de Garanties pour diminuer les taux d'intérêt élevés et d'une meilleure information sur les options financières disponibles.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, m=313

Défis des entreprises haïtiennes

Réseaux informels de prêts

La majorité des entreprises interrogées dépendent de prêts informels au lieu d'emprunter de l'argent des banques.

Question: Which sources of finance have you used to provide funds for your business?

- Emprunter de l'argent des amis: 34%
- Prêts de banques commerciales: 20%
- Autre: 19%
- Institutions de micro-finance: 13%
- Coopératives d'épargne et de crédit: 11%
- Groupes d'épargne: 8%

En l'absence d'options formelles et accessibles de prêts, les entreprises se tournent vers des réseaux informels pour leurs besoins de financement.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTF, Mai 2009, m=313
Défis des entreprises haïtiennes
Contraintes d'infrastructure

Infrastructure demeure un défi important en Haïti alors que la plupart des entreprises mentionnent l'accès à l'électricité et l'eau comme leurs principales contraintes.

- Accès à l'électricité et coût: 78% n'ont pas de problème, 20% en ont un
- Accès à l'eau et coût: 71% n'ont pas de problème, 28% en ont un
- Accès au transport et coût: 68% n'ont pas de problème, 31% en ont un
- Accès aux télécommunications et coût: 57% n'ont pas de problème, 38% en ont un

L'accès aux télécommunications a énormément amélioré au cours de ces dernières années mais l'accès à l'électricité en particulier est un problème pour les grandes entreprises.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe GTF, Mai 2009, n=513

Climat des Affaires en Haïti
Taux faible d'introduction des TIC

ICT penetration in Haiti is low, with the exception of mobile telephones which have gained significant ground in the last few years.

- Accès à Internet: 17.2% des personnes interrogées dans le secteur privé ont répondu qu'elles ont accès à l'internet dans leurs lieux de travail.
  - Tout = Micro = PME = Grande

  - 11.1%
  - 17.9%
  - 9.9%
  - 12.0%
  - 7.2%
  - 4.6%
  - 9.9%
  - 9.9%
  - 20.0%
  - 25.0%
  - 1.9%
  - 7.1%
  - 6.9%
  - 57.5%
  - 61.3%
  - 50.0%
  - 61.3%

L'introduction des TIC pourrait être améliorée dans le court terme par de meilleurs services de TIC au moyen de la plateforme des téléphones mobiles.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe GTF, Mai 2009, n=513
Climat des Affaires en Haïti
Perceptions positives vis-à-vis des TICs

Malgré la faible introduction des TIC, une majorité de personnes interrogées a répondu que la technologie pourrait jouer un rôle important dans le processus de développement économique.

**Question du Sondage**
- La technologie est un outil important de développement: 92% 26%
- L'internet vaut son coût: 54% 21% 25%
- Les personnes travaillant en Haïti ont le savoir et les capacités nécessaires pour utiliser la technologie de manière effective: 47% 17% 36%
- L'internet n'est pas important pour moi dans mon travail quotidien: 33% 11% 56%

**Répartition des Réponses (échelle 1 à 7)**

Il n'y a aucun doute que les gens en Haïti pensent que les TIC sont des outils importants, le défi consiste à diffuser leur utilisation en les rendant disponibles et en s'assurant que les gens savent les utiliser.

**Portrait des PME**
**Environnement des PME**

- **Position dans l'Organisation**
  - Propriétaire / Directeur: 43%
  - Staff Administratif: 14%
  - Professionnel: 21%
  - Étudiant: 12%
  - Manager / Gestionnaire: 10%

- La plupart des compagnies haïtiennes sont petites et ont un effectif de 3 à 24 personnes.
- La grande majorité des propriétaires et directeurs d'entreprises ont entre 30 et 49 ans.
- La plupart des entreprises réalisent des revenus de moins de US$50,000 par année.
Portrait des PME
Environnement des PME

- La plupart des leaders de PME passent leur temps dans l’entreprise lorsqu’ils ne travaillent pas à l’extérieur avec des partenaires.
- Ils sentent toujours à un stade de "survie" bien qu’ils semblent relativement ouverts à partager ce qui se passe dans leurs entreprises avec des personnes auxquelles ils ne font pas confiance.

SOURCE: Enquête Nationale sur la Compétitivité, CTC et Groupe CTF, Mai 2009, n=513

Portrait des PME
Environnement des PME

Les entreprises utilisent, ou pas du tout, des réseaux informels d’information et sont très peu informées des opportunités de services de développement durable.

SOURCE: Enquête Nationale sur la Compétitivité, CTC et Groupe CTF, Mai 2009, n=513
Pour les PME en Haïti
Services Souhaités par les PME

<table>
<thead>
<tr>
<th>Type de formation désirée par les PME</th>
<th>Voulez-vous recevoir une formation &amp; assistance externe?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing</td>
<td>Non, 12.1%</td>
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<tr>
<td>Gestion des Opérations Générales</td>
<td>Oui, 87.9%</td>
</tr>
<tr>
<td>Toutes les autres formations</td>
<td></td>
</tr>
<tr>
<td>Gestion Ressources Humaines</td>
<td></td>
</tr>
<tr>
<td>Finance &amp; Comptabilité</td>
<td></td>
</tr>
<tr>
<td>Leadership / Gestion</td>
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</tr>
</tbody>
</table>

Les chefs d’entreprises savent qu’ils ont besoin de développer leurs entreprises et sont ouvert à recevoir une formation et une assistance directe en ce sens.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe CIF, Mai 2009, n=313

Pour les PME en Haïti
Croyance des PME et des Associations

Une majorité de chefs d’entreprises demande une assistance à leurs parents et amis

À qui demanderiez-vous une assistance pour améliorer vos opérations?

Les réseaux d’assistance informels prédominent en Haïti et très peu de chefs d’entreprises utilisent des réseaux d’assistance formels.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe CIF, Mai 2009, n=313
Portret des PME en Haiti
Croyance des PME et des Associations

Quelles institutions sont mieux placées pour assister les PME?
- Amis et Famille: 83.0%
- Collègues / Associés: 14.9%
- Autres firmes professionnelles: 11.4%
- Consultants en affaires: 9.6%
- ONG: 3.6%
- Agences d'aide internationale: 3.6%

A qui s'adressent les hommes / femmes d'affaires lorsqu'ils ont des problèmes dans leurs entreprises?
- Vieux Amis: 42.0%
- Autres hommes/femmes d'affaires: 21.0%
- Epoux / Epouse: 16.2%
- Banquiers: 9.1%
- Fournisseurs & Clients: 6.6%

Les chefs d'entreprises n'utilisent pas souvent les ressources d'assistance professionnelles – en dehors des amis/parents/collègues – pour essayer de combler leur manque de compétence.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTT, Mai 2009, n=313

Portret des PME en Haiti
Importation/Exportation des PME

Exportez-vous un des produits de votre entreprise?
- Oui: 17.2%
- Non: 82.8%

Importez-vous des produits pour votre production?
- Oui: 28.6%
- Non: 71.4%

Les chefs d'entreprises ont beaucoup de contact d'affaires à l'étranger et très peu d'importation/exportation.

SOURCE: Enquête Nationale sur la Compétitivité, GTC et Groupe OTT, Mai 2009, n=313
Résultats du Sondage sur la Compétitivité d’Haïti
Agenda

- Antécédents et Pool des Personnes Interrogées
- Attitudes et Croyances des Leaders Haïtiens
- Segments des Attitude de Compétitivité
- Climat des Affaires
- Portrait des PME

Messages Potentiel pour la Campagne de Communication

Vision partagée pour une Haïti compétitive
Ou est-ce que Haïti sera dans 10 ans?

« Je rêve d’une Haïti ou l’éducation sera la priorité... ou le sécurités reigne... moi... j’engage dans la lutte pour concrétiser ces rêves » - Étudiant

« Pour avoir du changement... il faut que gens aient de la même » - Secteur Privé

« Haïti peut changer dans 10 ans si seulement les secteurs public et privé travaillent ensemble » - Secteur Public

« Si nous mettons pas nos main dans la pate on sera la catastrophe » - Secteur Privé

« Pour moi Haïti n’aura pas de changement si tous Haïtiens ne peuvent pas s’unir » - Secteur Privé

« Si nous mettons pas nos main dans la pate on sera la catastrophe » - Secteur Privé

« Face à cette neo-liberalisation, le système de privation qui ravage le pays on sera une catastrophe situationnelle. » - Secteur Public

« Il n’y aura pas un grand changement dans les 10 prochaines années » - Secteur Privé

« J’aimerais que... Haïti fasse des progrès avec de bonne structre pour que les gens peuvent aider les gens à développer leurs petites affaires » - ONG

« Si tous les problèmes socio-économiques ne sont pas résolus... Haïti sera un lieu habité par des sauvages dans environnement dégradé » - Secteur Privé

SOURCE: Enquêtes Nationales sur la Compétitivité, GTC et Groupe OTF, Mai 2006, n=762
Vision partagée pour une Haïti compétitive
“Culture d’Esprit d’Entreprise” Campagne – La Communauté des Affaires

<table>
<thead>
<tr>
<th>Conclusions Qualitatives et Quantitatives</th>
<th>Messages de Campagnes Appropriés &amp; Initiatives</th>
</tr>
</thead>
</table>
|  • Accès aux ressources financières extrêmement limité dû aux demandes de garanties et aux taux d'intérêt élevés |  • “L’urgent est les idées bien articulées”. Crédit disponible mais institutions financières ont besoin de projets bancables avec de bons plans d'affaires  
• Créer des centres d’affaires solides |
|  • Connaissance très limitée des marchés, particulièrement dans les provinces |  • “Connaître la demande avant de commencer à produire quoi que ce soit”. Les hommes d'affaires doivent apprendre à rassembler des informations sur les marchés locaux et externes, les prix, la concurrence.  
• Créer des centres d’affaires solides dans lesquels les entreprises peuvent trouver des informations cataloguées sur les marchés, les prix, le degré de la concurrence. |
|  • Connaissance limitée des programmes du gouvernement pour assister la communauté des affaires |  • Le gouvernement et le secteur privé travaillent ensemble pour encourager les entreprises compétitives”. Diffuser la notion que le secteur privé doit être le moteur de la prospérité, par conséquent, doit améliorer sa capacité d'être compétitif.  
• Créer et promouvoir des initiatives pour l'amélioration du niveau du secteur privé |

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Vision partagée pour une Haïti compétitive
“Culture d’Esprit d’Entreprise”— Conclusions, Messages et Initiatives

<table>
<thead>
<tr>
<th>Conclusions Qualitatives et Quantitatives</th>
<th>Messages de Campagnes Appropriés &amp; Initiatives</th>
</tr>
</thead>
</table>
|  • Leaders haïtiens ne croient pas dans l’avenir du pays |  • Promouvoir une attitude de “nous pouvons rattraper le temps perdu”  
• Disséminer des histoires de succès économique |
|  • Sentiment de manque de partenariat public-privé |  • Attaquer l’attention sur les exemples actuels de bonnes relations entre les secteurs privé et public  
• [ex. Digicel, autres]  
• Promouvoir le besoin d’Haïti de plus de partenariats entre les secteurs public et privé |
|  • Peu de confiance dans les capacités du secteur privé |  • Promouvoir les histoires de succès du secteur privé/expliquer le succès du secteur privé  
• Disséminer des cas de nationaux et de rassurants étrangers désirant devenir des excellents entrepreneurs |
|  • Personnes interrogées montrent davantage un esprit comparatif qu’un esprit compétitif |  • Disséminer les principaux principes de compétitivité  
• Instiller une “attitude de compétitivité” dans la société civile à travers le pays |

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Appendix 8—Potential Quick Wins by Cluster

Based on consultations with stakeholders in the priority sectors, the GC recommends that the following 25 actions be pursued as “Quick Wins” to mobilize the sectors and make concrete improvements in the sectoral business environment.

HIGH END FRUITS AND TUBERS
Establish a High-End Fruits and Tubers Guarantee Fund: Accessing affordable credit in Haiti remains a major constraint to doing business. While micro-finance will certainly be necessary to reach and positively impact the small production farmer, a guarantee fund specially tailored to meet the needs of SMEs involved in horticulture could greatly alleviate financing constraints, allowing for more rapid industry growth. Such a guarantee fund could be established in partnership with USAID and/or the IFC.

Launch Seminar Series with Financiers on the Exotic Fruits and Tubers Sector: Affordable financing remains a major constraint in Haiti, due in part to lack of necessary communication between financiers and those who seek financing. An ongoing financing seminar geared towards the exotic fruits and vegetables sector will serve as a forum in which financiers and potential borrowers can share new opportunities, discuss market research, as well as share information about the necessary steps to secure financing.

Formalize Produce Traceability Capabilities: Produce traceability capabilities are becoming increasingly important in today’s international market, with many international certifications requiring traceability standards. While a small percentage of Haiti’s produce is traceable, due in large part to private sector initiatives, a national level system of traceability standards and procedures should be established.

Establish a Joint-Marketing Body for High-End Fruits and Tubers: In order to increase marketing efficiency and reduce costs for individual exporters, a joint-marketing body could be established to develop Haiti’s overall high-end fruits and vegetables branding, similar to what Haiti accomplished with “Haitian Blue”. This body would allow individual exporters to pool financial and social capital resources, and subsidize tradeshows and direct marketing costs.

Assembly Report of Key Roads that Must Be Improved: Currently, a large percentage of Haiti’s produce is lost in country due to poor roads, which cause significant transport delays during poor weather, and produce bruising. An initial report should be assembled, assessing and prioritizing road repair as it relates to the high-end fruits and tubers sector.

Improve Port Efficiency for Perishable Items: Establishing a dedicated office of fruits and vegetables within the Port Authority will be a key step in prioritizing the sector, allowing for improved streamlining of goods, sensitization of the port authority to the sector’s needs, and providing qualified exporters with a one-stop-export-shop for their products.

ASSEMBLY
Establish an Assembly Guarantee Fund: Accessing affordable credit remains one of the top constraints to Haiti’s assembly/textile sector. Faced with a potential minimum salary increase, the industry must rapidly move to higher-value products, which will require $5–10 million in initial funding. A specially tailored guarantee fund should be
# Potential Quick Wins by Cluster

<table>
<thead>
<tr>
<th>Sector</th>
<th>Actions</th>
<th>Cost (US $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruits &amp; Tubers</td>
<td>Establish a high-end fruits and vegetables Guarantee Fund</td>
<td>$2,000,000</td>
</tr>
<tr>
<td></td>
<td>Launch seminar series with financiers on the exotic fruits sector</td>
<td>$50,000</td>
</tr>
<tr>
<td></td>
<td>Formalize produce traceability capabilities</td>
<td>$150,000</td>
</tr>
<tr>
<td></td>
<td>Establish a joint-marketing body for high-end fruits and vegetables</td>
<td>$250,000</td>
</tr>
<tr>
<td></td>
<td>Assemble report of key roads that must be improved.</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Improve port efficiency for perishable items</td>
<td>$400,000</td>
</tr>
<tr>
<td>Animal Husbandry</td>
<td>To come based on final analysis</td>
<td></td>
</tr>
<tr>
<td>Tourism</td>
<td>Establish a Tourism Guarantee Fund</td>
<td>$2,000,000</td>
</tr>
<tr>
<td></td>
<td>Change laws to establish appropriate border crossing fees and regulations between Haiti and the Dominican Republic</td>
<td>$20,000</td>
</tr>
<tr>
<td></td>
<td>Create a website for Lo Citadelle</td>
<td>$10,000</td>
</tr>
<tr>
<td></td>
<td>Organize a development partner meeting around tourism needs</td>
<td>$2,500</td>
</tr>
<tr>
<td>BPO</td>
<td>Launch seminar series with financiers on the BPO sector and opportunities in Haiti</td>
<td>$50,000</td>
</tr>
<tr>
<td></td>
<td>Organize a mini-trade show allowing local service providers to showcase their capabilities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lobby for the rapid completion of the fiber-optic network</td>
<td>$75,000</td>
</tr>
<tr>
<td></td>
<td>Establish a commission-based marketing and sales system with ADIH</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Re-elect the “Commission Tripartite”</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Assemble a sector strengthening proposal</td>
<td>$250,000</td>
</tr>
<tr>
<td></td>
<td>Promote “Pulitzer Prize” type award for Haiti an Journalism focused on apparel</td>
<td>$100,000</td>
</tr>
<tr>
<td>TOTAL COST</td>
<td></td>
<td>$10,797,500</td>
</tr>
</tbody>
</table>

Summary of Quick Wins by Cluster plus preliminary budgets developed to encourage and facilitate such a migration to higher value production.

**Improve the Legal Framework as it Relates to the Apparel Industry:**
- Develop a more competitive shift system: Haiti’s current legal framework surrounding the shift system prevents the industry from amortizing fixed costs over increased shifts. Strong advocacy efforts should be commenced in order to improve the competitiveness of the legal framework.
- Improve the legal framework surrounding electricity distribution:
Establish a Seminar Series to Build Capacity of Media in Sector-Related Issues: Haiti’s textile/assembly industry is high profile, capturing the attention of both the local and international community. A seminar series to build the capacity of the media in sector-related issues could help to steer debate and conversation to a more productive place. Such a series would be guided by up-to-date market information, advocacy efforts and opportunities.

Within ADIH, Develop an Haitian Apparel Marketing Division Headed by the Current Vice President of Apparel at ADIH
- Develop joint marketing and subsidization efforts to improve and increase international marketing (Trade shows, inbound and outbound missions, host potential investors and buyers, connect buyers, investors and local actors)
- Coordinate & disseminate systematic market research to inform product development and target market choice, opportunities and constraints
- Coordinate joint training efforts for sector members with industry experts, marketing experts, etc

Establish a Commission-Based Marketing and Sales System with ADIH: In order to ensure the sustainability of a new ADIH-based Apparel marketing Division, a commission-based marketing and sales system should be developed, with a percentage of revenues going directly to ADIH marketing and sales representatives, and a percentage to ADIH.

Re-activate the “Commission Tripartite”: The Commission Tripartite, a now defunct organization, should be re-activated to support what is Haiti’s most high-profile sector, through systematic arbitration, advocacy and conflict resolution. The Commission Tripartite will be responsible for staying on top of issues that impact the industry, both directly and indirectly.

Assemble a Sector Strengthening Proposal (With Budget): Through the assistance of a consultancy, develop a sector strengthening proposal which will clearly define the key activities and cost for the strengthening of Haiti’s assembly sector. This proposal will serve to harmonize beneficiary and international donor community activities towards common goals, decrease duplication of efforts, and guide the industry forward. In particular, this proposal will outline specific activities and financing to strengthen ADIH’s new role.

Promote “Pulitzer Prize” Type Award for Haitian Business Journalism Focused on Apparel: Encourage world-class media coverage on Haiti’s assembly sector through the development of this prize. The prize would require a small marketing budget.

ANIMAL HUSBANDRY (POULTRY)
Establish & coordinate poultry-specific micro-financing options: While a variety of micro-financing options exist in Haiti, their activities must be harmonized, strengthened and communicated. Develop a communications campaign to raise awareness of micro-financing options, with a particular emphasis on raising awareness in Haiti’s provinces.

Conduct Survey of Current Poultry/Egg Importers In Haiti: As Haiti moves to substitute its import of eggs from the Dominican Republic with local production, a quick survey should be administered in order to better understand local market needs. The results of such a survey will help guide the development of this sector.

Conduct a Quick Analysis of Needed Land and Resources to Support a New Poultry Sector: A successful poultry sector in Haiti will depend on local availability of land to grow chicken feed components, such as sorghum. Conduct a quick analysis of appropriate and available land that is needed.
to support a potentially rapidly expanding poultry sector. How much land is needed? What land can be secured in the short term, and in the medium term?

**BPO**

**Launch Seminar Series with Local Financiers on the BPO Sector and Opportunities in Haiti:** Affordable financing remains a major constraint in Haiti, due in part to lack of necessary communication between financiers and those who seek financing. An ongoing financing seminar geared towards the BPO sector will serve as a forum in which financiers and potential borrowers can share new opportunities, discuss market research, as well as share information about the necessary steps to secure financing.

**Organize a Mini-Tradeshow Allowing Local Service Providers to Showcase their Capabilities:** In the short to medium term, the largest market for Haitian BPO will be the local market. At this point in time, very few local stakeholders are aware of the capabilities of Haiti’s BPO sector. A mini-trade show should be organized to showcase capabilities to local decision makers in government, hospitals, larger corporations, universities and technical institutes, etc.

**Lobby for the Rapid Completion of the Fiber-Optic Network:** If all stakeholders are aligned, Haiti could be fiber-optic enabled within 12–24 months.

**TOURISM**

**Establish a Tourism Guarantee Fund:** Accessing affordable credit in Haiti remains a major constraint to its tourism industry. A tourism guarantee fund would substantially reduce risk for lending institutions looking to support Haiti’s burgeoning tourism industry.

**Change Laws to Establish Appropriate**

**Border Crossing Fees and Regulations**

**between Haiti and the Dominican Republic:** Currently, Dominicans looking to enter Haiti must pay a per person, per entry fee of $350. Additionally the legal port authority should be examined and optimized for overland travel between Haiti and the Dominican Republic.

**Improve the Legal Framework Surrounding Property and Condo Ownership:**

**Develop a National Tourism Strategy and A Special Tourism Strategy for Cap Haitien, with a Special Emphasis on Aligning Donor Interventions in Tourism**

**Integrate Basic Tourism Training into Existing University and Technical Institute Curriculums for 2010**

**Create a Website for La Citadelle:** Cap-Haitien tourism sector could generate tremendous momentum by building a strong website around la Citadelle its key attraction

**Perform Cost-Benefit Analysis for Tourism Barriers:** the DR visa, the cruise line situation and high interest rates for tourism emerged as three areas where we could do an analysis to outline how much money Haiti was leaving on the table in tourism because of inaction.

**Organize a Development Partner Meeting around Tourism Needs:** the idea would be to bring development partners and their projects together to discuss opportunities for support in tourism. This meeting could be held in Cap Haitien, and could have special time dedicated to the identification of funds for bringing the Citadelle to Royal Caribbean standards.
Appendix 9—Full strategic analysis by cluster

Garments

Shared Vision for a Competitive Haiti
Assembly Sector National Diamond

Haiti’s business environment, incomplete cluster and weak infrastructure are the biggest impediments to the growth of the sector.

- Tax and customs advantages
  - Unfavorable country image (Doing Business ranking of 154)
  - Potential change in minimum wage
  - Slow administrative processes
  - Moderately favorable

- Brutal price competition in many segments of assembly.
  - Investors and buyers have low switching costs.

- Lowest labor costs in hemisphere (1/3 of DR’s wages)
  - Proximity to market (~4 days)
  - Most expensive port in the region
  - Poor roads system
  - Little access to credit (Getting Credit DB09 rank: 145)
  - Low technology penetration
- Favorable

- No local production of raw materials (e.g. textiles)
- Distribution partners are limited
- Leverage celebrities to focus on social benefits of investment in assembly
- AQDD is a strong coordinating body
- Moderately unfavorable


Situation Analysis
Haiti’s Current Positioning – T-shirts, Singlets & Vests Exporting Countries

Haiti currently exports some of the lowest value products in its “chosen” segments in the world.

Source: ITC Trademap, February 2009
Note: 8108 T-shirts, singlets and other vests, knitted or crocheted
### Factors

Haiti is constrained by its lower forms of capital, but higher forms are promising

<table>
<thead>
<tr>
<th>Summary of constraints and opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cultural</strong></td>
</tr>
<tr>
<td>- History of working in apparel sector.</td>
</tr>
<tr>
<td><strong>Human</strong></td>
</tr>
<tr>
<td>- Abundance of skilled labor for apparel, including a vast pool of unemployed people—sector used to employ 60,000 but currently employs only 23,000.</td>
</tr>
<tr>
<td>- Young and active labor force. (average age of labor)</td>
</tr>
<tr>
<td>- Haiti lacks skills for higher level management staff.</td>
</tr>
<tr>
<td><strong>Knowledge</strong></td>
</tr>
<tr>
<td>- Some entrepreneurs in Haiti understand sector deeply and know how to compete effectively.</td>
</tr>
<tr>
<td><strong>Institutional</strong></td>
</tr>
<tr>
<td>- Benefits of HOPE II.</td>
</tr>
<tr>
<td>- Existence of ADIH, the manufacturers' association.</td>
</tr>
<tr>
<td>- Worst Doing Business ranking in the hemisphere.</td>
</tr>
<tr>
<td><strong>Lower Forms</strong></td>
</tr>
<tr>
<td>- Apparel relies on access to capital for equipment and machinery.</td>
</tr>
<tr>
<td>- Little access to credit and high interest rates is a critical constraint.</td>
</tr>
<tr>
<td>- Transport infrastructure is limited and electricity supply remains unreliable.</td>
</tr>
<tr>
<td>- No space available to expand operations.</td>
</tr>
<tr>
<td>- More Free Zones needed.</td>
</tr>
<tr>
<td>- Haiti is well positioned geographically and has easy access to the sea.</td>
</tr>
</tbody>
</table>

Source: Framework, Michael Farbanks, OTF Group Analysis
APPENDIX 9—FULL STRATEGIC ANALYSIS BY CLUSTER

Apparel cluster
Inputs generally lacking locally, but strong apparel firms and industry association.

Shared Vision for a Competitive Haiti
Apparel Sector Migration Path

Strategy

Operational Efficiency

There are 2 principal routes to the productivity frontier: beginning with strategy or beginning with operational effectiveness.
Shared Vision for a Competitive Haiti
Assembly SWOT Analysis—Leverage HOPE II

The EDC should establish itself as the anchor for entrepreneurship development in Rwanda by creating value for entrepreneurs and key partners.

Assembly Sector SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Factors</td>
<td>Internal Factors</td>
</tr>
<tr>
<td>• High value-added production, creating high value for customers</td>
<td>• High administrative and business development costs, can be prohibitive</td>
</tr>
<tr>
<td>• Access to foreign markets</td>
<td>• Limited access to foreign markets</td>
</tr>
<tr>
<td>• Strong labor force</td>
<td>• Limited infrastructure and business development services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>• HOPE II provides direct access to foreign markets</td>
<td>• Target market is limited</td>
</tr>
<tr>
<td>• Strong labor force can create high value for customers</td>
<td>• Global market is competitive</td>
</tr>
<tr>
<td>• Strong demand for assembly products</td>
<td>• Global market is competitive</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ST Strategies</th>
<th>WT Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Increase production in high value segments of assembly</td>
<td>• Target market is limited</td>
</tr>
<tr>
<td>• Expand production to meet demand for medium and low value products</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NT Strategies</th>
<th>AT Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Target market is limited</td>
<td></td>
</tr>
<tr>
<td>• Global market is competitive</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fruits and Tubers</th>
</tr>
</thead>
</table>

Shared Vision for a Competitive Haiti
Assembly Sector National Diamond

Haiti’s business environment, incomplete cluster and weak infrastructure are the biggest impediments to the growth of the sector.

+ Favorable
- Brutal price competition in many segments of assembly.
- Investors and buyers have low switching costs.

+ Lowest labor costs in hemisphere (1/3 of DR’s wages)
+ Proximity to market (~ 4 days)
+ Most expensive port in the region
+ Poor roads system
+ Little access to credit
+ High technology penetration

+ Favorable
- No local production of raw materials (e.g., textile)
- Distribution partners are limited
- Leverage celebrities to focus on social benefits of investment in assembly
- ADD II is a strong coordinating body
- Modestly unfavorable

Haiti Industrial and Commercial Vision

Global Market Analysis – Guavas, Mangoes etc Importing Countries

North American markets are large, but pay relatively low prices and are growing slowly; what are the opportunities in Europe?

**Guavas, Mangoes etc Importing Countries: Top 12 by Value, 2007**

- **France**, $102
- **Portugal**, $25.4
- **Netherlands**, $9.3
- **Germany**, $73
- **UK**, $103
- **Belgium**, $54
- **Italy**, $28
- **Saudi Arabia**, $28
- **United Arab Emirates**, $37
- **Singapore**, $15
- **China**, $64
- **Australia**, $44

**Annual growth in value 2003 - 2007:** 13%

**Global average annual growth rate 2003 - 2007:** 13%

Total Value Imported: $1.23 billion

Annual growth in quantity: 4%

Legend: country name, imports in US $ millions

Source: ITC Trademap, October 2009

Note: 300000 Guavas, mangoes and mangosteens, fresh or dried

**Processed Fruits and Vegetables Cluster Map**

Highly fragmented suppliers have little access to technology; fruit processors are few.
**Migration du secteur horticulture & tubercules**
First, improve efficiency, expand product range and then vertically integrate.

![Diagram showing strategies and operational efficiency](image)

**Stratégie pour le secteur horticulture**
A « basket approach » centered around crops with proven potential

<table>
<thead>
<tr>
<th>Segment</th>
<th>Opportunity for Haiti</th>
<th>Challenges &amp; Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mangoes</td>
<td>Haitian mango (e.g. Mango Madama Francique) is a high quality variety and commands ~$1.5 more per dozen than Mexican variety. Haiti able to produce mangoes ~10 months per year ~ 3-4 months more than most other mango-exporting countries.</td>
<td>Export compliance &amp; traceability Export quality (packaging and cold chain)</td>
</tr>
<tr>
<td>Avocados</td>
<td>Avocado is produced in almost every ecocological region of Haiti. Avocado production occurs throughout most of the year.</td>
<td>Current production is spread out throughout the country Export labeling, packaging and certification</td>
</tr>
<tr>
<td>Pineapples</td>
<td>Developed local market with relatively high prices [input prices]. High quality species produced in Haiti.</td>
<td>Organic certification No history of exporting significant amounts of pineapples</td>
</tr>
</tbody>
</table>

*The opportunities are there – so ... why does Haitian horticulture remain so small?*
Shared Vision for a Competitive Haiti

Horticulture SWOT Analysis – Target niche markets while raising incomes

<table>
<thead>
<tr>
<th>Horticulture SWOT Analysis</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External Factors</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal Factors</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Demand for tropical fruits is increasing – e.g. US imports of Hass avocados has grown by 35% per annum since 2004</td>
<td>Varieties of micro-climates which enable production of diverse species of fruits</td>
<td>Poor infrastructure and business enabling environment</td>
</tr>
<tr>
<td>• Consume taste shifting more towards organic products</td>
<td>Climate allows production of a number of fruits during off-season period – e.g. mango</td>
<td>Appropriate financing generally unavailable</td>
</tr>
<tr>
<td><strong>SO Strategies</strong></td>
<td>Cultivate high-value species which can be sold for a premium – e.g. during off season</td>
<td>Difficulties in meeting certification requirements due to lack of standardization</td>
</tr>
<tr>
<td><strong>ST Strategies</strong></td>
<td>Leverage cheap labor to keep production costs low</td>
<td></td>
</tr>
<tr>
<td><strong>WO Strategies</strong></td>
<td>Designate organic zones and create infrastructure to trace products and market as organic</td>
<td></td>
</tr>
<tr>
<td><strong>WT Strategies</strong></td>
<td>Grow high quality products to international markets and process medium quality products for local consumption</td>
<td></td>
</tr>
</tbody>
</table>

Global Market Analysis – Horticulture Industry

Market is generally competitive but Haiti is able to compete within niche segments

- **Low**
  - Supply of agricultural inputs is widely available at fairly competitive prices – inorganic fertilizers, etc.

- **High**
  - Many regional players compete in the same markets as Haiti – e.g. EU, and other countries from Caribbean and Latin America
  - Opportunities exist for Haiti to find niches to compete especially within organic and Fair Trade segments

- **Medium**
  - Fruit and vegetable consumption generally stable – e.g. US market consistently growing at ~7%
  - Individual fruits (more so than vegetables) tend to rise and fall in popularity.

Haiti should find niches in order to compete more effectively.

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Haiti Industrial and Commercial Vision

Global Market Analysis – Guavas, Mangoes etc Importing Countries

North American markets are large, but pay relatively low prices and are growing slowly; what are the opportunities in Europe?

Haiti BPO diamond analysis

Improve ICT and leverage low wages to compete in low-cost segments.

- Limited potential for job creation may be a barrier for government support
  - **Moderately unfavorable**

- Proximity to market
  - **Favorable**

- Lowest wages in the region
  - **Favorable**

- French as a language – helpful if targeting francophone countries
  - High energy costs – more than 20 cents per kWh
  - Low ICT skill base
  - Lower literacy rates compared to the region – only 53% literacy rate
  - Fiber optics not yet implemented
  - **Moderately unfavorable**

- Haitian’s current business environment needs improvement – Doing Business ranking of 154
  - **Unfavorable**

- No current vision for ICT sector

- Global trends towards process outsourcing are favorable – double digit growth in most segments
  - **Favorable**

- Fast market growth in Francophone markets
  - Local demand (e.g. government) is small and unsophisticated

- Weak providers of technical training and specialised equipment due to low starting base of demand
  - **Moderately unfavorable**


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Source: ITC Trademap, October 2009
Note: 08040 Guavas, mangoes and mango derivatives, fresh or dried
BPO Sector Migration Path

Improve the infrastructure then migrate from low-wage to high-wage segments.

Operational Efficiency

There are 2 principal routes to the productivity frontier: beginning with strategy or beginning with operational effectiveness.
Global Market Analysis – BPO Industry

Intense competition on costs.

High
- BPO is not capital intensive
- Improvements in technology make it easier for new countries to enter BPO space
- Low-cost labor is essential to enter BPO sector

Low
- Assuming existence of ICT infrastructure, major input is labor – suppliers are weak

High
- Companies compete fiercely on costs
- Many new countries are recently entering the BPO market – e.g. Jamaica, Senegal etc.

High
- Buyers have a large supply of BPO providers to choose from
- Low switching costs
- Technology makes monitoring easier

Low
- Given cost savings from BPO substitutes are low

Haiti needs to leverage efficiencies to remain a low-cost player and compete in this competitive market.

Shared Vision for a Competitive Haiti

BPO SWOT Analysis

Opportunity is present but improvements in infrastructure are needed.

<table>
<thead>
<tr>
<th>BPO Sector SWOT Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External Factors</strong></td>
</tr>
<tr>
<td><strong>Internal Factors</strong></td>
</tr>
<tr>
<td>- High growth in BPO sector – market is estimated to grow by 54% per year from 2008 to 2010</td>
</tr>
<tr>
<td>- Improvements in communication technologies</td>
</tr>
<tr>
<td>- French educational system</td>
</tr>
<tr>
<td>- Large number of Haitians living in North America [data needed]</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
</tr>
<tr>
<td>- Increased competition from other low-cost countries (e.g., the number of operators in Senegal has grown from 80 to 5000 in past six years)</td>
</tr>
<tr>
<td>- More demanding customers who require a high level of cultural knowledge and clear pronunciation of the language.</td>
</tr>
</tbody>
</table>

Source: JTF Group Analysis based on organizational interview; Oather, IDC, BDO
Tourism Competitive Diamond

Tourisme

Haiti Tourism – Cluster Map
Many of the cluster components already exist but need further improvement.
Tourism Sector Migration Path
Start with “tolerant” tourists and migrate to more demanding tourists.

Operational Efficiency

Shared Vision for a Competitive Haiti
Tourism SWOT Analysis
Focus on diaspora and emphasize Haiti's rich history and culture.

Tourism Sector SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural resources – climate, beaches, mountains, natural sites</td>
<td>Poor infrastructure – roads, electricity, sanitary structure etc.</td>
</tr>
<tr>
<td>Rich history &amp; culture</td>
<td>Perception of poor security in certain areas of Haiti</td>
</tr>
<tr>
<td>Proximity to market</td>
<td>Lack of a marketing strategy</td>
</tr>
</tbody>
</table>

**Opportunities**
- Spending per tourist is relatively low and can be increased
- Large Haitian population abroad who would be willing to visit – ~1m Haitians in US
- Surveys show that many people who visit the DR would like to visit Haiti as well for a brief period

**Threats**
- The global financial crisis has had some impact on tourism in many regions.
- Competition from other areas is growing stronger
- Poor ranking in tourism indices (e.g., WT index) or security warnings may continue to discourage travelers to Haiti

**Internal Factors**

<table>
<thead>
<tr>
<th>Threats</th>
<th>ST Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Haiti as affordable alternative</td>
<td></td>
</tr>
<tr>
<td>Emphasize culture and history as differentiator – not just beaches</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>SW Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Haitian diaspora in US &amp; Canada</td>
<td></td>
</tr>
<tr>
<td>Create tailored programs for tourists coming from DR</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Threats</th>
<th>WT Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve infrastructure and equip touristic sites</td>
<td></td>
</tr>
<tr>
<td>Create marketing strategy emphasizing key particularities of every region of country</td>
<td></td>
</tr>
</tbody>
</table>
**Elevage de Volaille**

Increased competition from other countries has led to a national shift from production to imports. Strategy to date has focused on low sophistication activities (e.g., rearing) when income potential lies in more sophisticated tasks (e.g., processing).

+ **Moderately favorable**
  - Increased competition from other countries has led to a national shift from production to imports.
  - Strategy to date has focused on low sophistication activities (e.g., rearing) when income potential lies in more sophisticated tasks (e.g., processing).
  - Unfavorable

+ **Relatively cheap land and labor**
+ **Favorable weather and soil conditions**
+ **Favorable**

+ **Strong poultry rearing sector with more than 750,000 small producers and 100 larger scale producers**
+ **Few poultry processors**
+ **Cluster actors focus on areas with little sophistication (e.g., no equipment providers etc.)**

**Moderately unfavorable**

+ **Large and high growth total consumption**
  (consumption from 985 tons in 1976 to 29672 tons in 2004)

Source: Framework, Michael Porter "Competitive Advantage of Nations", OTF Group Analysis

---

**Market Analysis – Poultry Industry**

**Competition from imports**

- **High**
  - Low barriers to entry – capital investment is relatively small

- **Low**
  - Large number of suppliers with little product differentiation (poultry, poultry feed etc.)

- **Medium**
  - Customers can switch to other meat items or reduce meat consumption

**Rivalry Among Existing Competitors**

- **High**
  - Increasing competition – Haiti’s imports have gone from 25 metric tons in 1976 to 29672 tons in 2004.
  - Competition is primarily on price

**Threat of Substitutes, Products or Services**

- **High**
  - Supermarkets buy in bulk and have significant power over producers
  - Given perishable nature of product, producers are pressured to sell quickly

Given level of rivalry, Haiti’s poultry processing needs to attain low cost structure through mechanization and scale.
Haiti poultry processing—Cluster Map
Rearing is widespread but processing needed to increase sophistication.

7 Forms of Capital for Haiti’s poultry processing sector
Poor infrastructure and lack of access to financing as major constraints.

Summary of constraints and opportunities

- A history of raising chickens—chicken rearing is practiced by more than 750,000 farmers
- Annual abundance of cheap labor in the agricultural sector—more than 50% of labor force
- A few individuals (3 to 5) already have know-how to rear more than ten thousand chickens per month
- Presence of formal rural institutions is limited
  - AHPEL is an institution which oversees the rearing sector
- Limited credit and high interest rates—however, chicken rearing is not very capital intensive
- Road infrastructure is in poor condition—chicken usually transported from rural areas to major cities
- Haiti is well endowed with vast amounts of rural land to raise animals
  - Food for animals—e.g. corn, is widely grown in the country

Source: Framework, Michael Fairbanks, OTF Group Analysis
Elevage Sector Migration Path
From rearing to processing

Operational Efficiency?

There are 2 principal routes to the productivity frontier: beginning with strategy or beginning with operational effectiveness.
Shared Vision for an Inclusive and Prosperous Haiti
Final Report

PREPARED BY:
Presidential Commission on Competitiveness
Groupe De Travail Sur La Competitivite (GC)

WITH THE FACILITATION OF:
OTF Group

NOVEMBER 2009