# Gender and Women's Rights Analysis of Economic Partnership Agreements: the implementation of trade liberalisation

## Jamaica

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## Acronyms

| | |
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| ACP | African, Caribbean and Pacific Group of States |
| ADA | Association of Development Agencies |
| BOP | Balance of Payments |
| BWA | Bureau of Women's Affairs |
| CARIBCAN | Caribbean-Canada Trade Agreement |
| CARICOM | Caribbean Community |
| CARIFORUM | Caribbean Forum |
| CBERA | Caribbean Basin Economic Recovery Act |
| CBI | Caribbean Basin Initiative |
| CEDAW | Convention on the Elimination of All Forms of Discrimination Against Women |
| CET | Common External Tariff |
| CPA | Cotonou Partnership Agreement |
| CPI | Consumer Price Index |
| CRNM | Caribbean Regional Negotiating Machinery |
| CSME | CARICOM Single Market and Economy |
| DFID | UK Department for International Development |
| DFQF | Duty Free Quota Free |
| DOMs | French Departements d'Outre-Mer |
| EC | European Community |
| EDF | European Development Fund |
| EPA | Economic Partnership Agreement |
| ESSJ | Economic and Social Survey of Jamaica |
| EU | European Union |
| FHH | Female Headed Households |
| FTA | Free Trade Agreement |
| GATS | General Agreement on Trade in Services |
| GATT | General Agreement on Tariffs and Trade |
| GCT | General Consumption Tax |
| GDP | Gross Domestic Product |
| GNP | Gross National Product |
| GSP | Generalized System of Preferences |
| HFLE | Health and Family Life |
| HIV | Human Immunodeficiency Virus |
| HS | Harmonized System |
| IDB | Inter-American Development Bank |
| ILO | International Labour Organization |
| IMF | International Monetary Fund |
| JSLC | Jamaica Survey of Living Conditions |

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| JSOC | Jamaica Standard Occupational Classification |
| JTAT | Jamaica Trade and Adjustment Team |
| KMA | Kingston Metropolitan Area |
| LDCs | Least Developed Countries |
| MDCs | Most Developed Countries |
| MDG | Millennium Development Goals |
| MFAFT | Ministry of Foreign Affairs and Foreign Trade |
| MFN | Most Favoured Nation |
| MSMEs | Micro, Small and Medium-Size Enterprises |
| NAFTA | North American Free Trade Agreement |
| NIP | National Industrial Policy |
| OECS | Organization of Eastern Caribbean States |
| PATH | Programme of Advancement Through Health and Education |
| PIOJ | Planning Institute of Jamaica |
| SDT | Special and Differential Treatment |
| SPS | Sanitary and Phytosanitary Standards |
| STATIN | Statistical Institute of Jamaica |
| SVEs | Small and Vulnerable Economies |
| TBT | Technical Barriers to Trade |
| UNDP | United Nations Development Programme |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| UNIFEM | United Nations Development Fund for Women |
| UTECH | University of Technology |
| UWI | University of the West Indies |
| WTO | World Trade Organization |

## Executive Summary

This study examines the likely gender impact of the EU-CARIFORUM Economic Partnership Agreement (EPA) on the Jamaican economy. It contributes to an ongoing debate on gender and trade liberalization. It begins by establishing the linkages between globalization, trade liberalization, gender and human rights.

January 2009 marked the implementation of the EPA after a very lengthy process. Completion of the study coincided with several critical milestones: the acute global economic recession; the negative impact of climate change; a patriarchal gender system that reflects persistent inequalities and a widening gap between the rich and the poor. Jamaica's capacity to prepare for the EPA implementation is impacted by several factors, key among which are: a massive debt burden which absorbs more than half the national budget; the challenges of an increasingly feminized HIV infection and increasing crime and violence.

Jamaica has a strong commitment to a rights-based approach to development. This is evident in the country's ratification of the CEDAW and ILO Conventions and the *Vision 2030 Jamaica Development Plan.* This outlines a commitment to equitable, sustainable, participatory development, as well as respect for the rights of women, children and workers.

*Context:* The first section of the study explores links between globalization, gender equality, trade and development. It argues that trade and economic development should support women's human rights, and a decent standard of work. At a macro level it outlines the gender division of the labour force in the goods producing and service sectors as well as the reproductive sectors. Given the structural gender inequalities in the labour market, it is expected that the EPA will result in a differential impact and outcome for women and men as social groups.

*EPA History and Framework:* The study briefly traces the history of Jamaica's trade relationship with the EU and CARICOM partners, then provides an overview of: the timelines for goods to be liberalized; tariff rates to be removed and; items excluded from the EPA tariff liberalization schedule (i.e. items which will continue to attract tariffs as per other existing trade agreements). These factors are later used to assess the likely gender effects of the EPA on the Agriculture, Manufacturing and Mining Sectors.

*Criteria:* Guided by a gender analytical framework developed for the research project, the study assesses the gender-sensitivity of a product or service to be traded. From a production perspective, goods to be liberalized are examined to assess the labour intensity of the product by one sex or the other. Food products consumed by the majority are assessed to determine which sex has major decision-making power regarding its use. The criteria were applied to consumption and production characteristics of key sub-products to examine possible winners and losers.

## Main Findings on Gender Characteristics of Consumption

*Education and Training:* The profile of education shows a comprehensive programme from early childhood, primary, secondary, vocational and tertiary levels. The sector receives 13% of the national budget which includes core service delivery as well as welfare, HIV and HFLE programmes, which respond to education problems. Among these problems are: poor education outputs at secondary levels; male under participation and male-achievement; violence; high youth unemployment and limited education certification as measured by examinations. Despite the need for education at tertiary level to support EPA implementation, a reallocation of the last education budget saw a 1.1% cut to tertiary education institutions.

*Household Structure and Consumption:* Almost half of households (over 46%) are female-headed. The size of these households is larger; income is smaller, reflecting a higher rate of poverty in the poorest quintile. The proportion of consumption in these households is less than in male households.

## Main Findings on Gender Characteristics of Production

The labour market reflects a sharp gender division of labour in the productive sector, despite an almost equal distribution of males and females in the population. The most striking features of the labour market are: females having lower levels of employment, lower labour force participation rates, having twice the level of unemployment, but a higher job seeking rate than males.

*Employment by Sector:* In terms of sectoral employment the goods producing sector is dominated by males and it contributes 32% to GDP. The services sector contributes 68% to GDP and is dominated by females with 86% of employed females working in this sector.

*Employment Status:* The employment status of each sex also varies. Men are more likely to be skilled workers in the productive sector, skilled agricultural workers and craft and plant workers. Females are more likely than males to be government employees (59%) and unpaid employees (75%), but are less likely to be employers than males (29%) and are 35% of "Own Account Workers". In the employed labour force women form the majority of: clerks, service workers and workers in elementary occupations. Almost 50% of women are in Professional and related categories.

*Wages by Gender:* Wages also vary by gender as specific wage categories are dominated by one sex or the other. In the male dominated sectors, wages are higher than in the services sector dominated by females. Ironically, micro-data on sub-sectors in the goods producing sector is available in sharp contrast to the absence of micro-data on the services sector. This limited our ability to conduct a comprehensive gender impact assessment of the EPA.

## Gender Impact of EPA on Major Sectors

The results of the study show that men are more dominant in the *Goods Producing Sector* and women more dominant in the *Services Sector.* This gender division of labour also coincides with low-pay in the occupations dominated by females and higher earnings in the sectors dominated by males.

*Gender Impact of EPA on Goods Producing Sector:* The concentration of males in the manufacturing sector indicates that the manufacturing sub-sectors, producing for local use are likely to have a greater impact on males as a result of the removal of tariffs in the gender-sensitive products identified. Imports from the EU are likely to occur to take advantage of the reduced tariffs. For example, *Portland Cement* and *Textiles & Apparel* are examples of goods to be most impacted in the manufacturing sector. Local production and employment in these two categories are expected to be negatively affected as increased EU imports challenge: i) an industry dominated by female employment which is in decline (*Textiles & Apparel*) and ii) an industry with supply/production shortage issues (*Portland Cement*). The analysis also shows that *Spices* in the agriculture sector are expected to be negatively affected, albeit to a lesser extent, as increased EU imports enter the country to take advantage of the reduction in tariffs.

*Gender Impact of EPA on Services Sector:* Statistical micro-data on the services sector and sub-sectors were not available, which made it impossible to conduct a complete gender impact assessment on the sector. However some estimation of the impact was made using alternative strategies. The list of the 29 categories of workers including professionals who may be eligible to work in Europe for up to 12 months was examined and a rough assessment was made of the gender division of labour in each, based on official data of persons graduating from various institutions. A table was then constructed using proxy data from published educational enrollment data and outputs in the Economic and Social Survey of Jamaica 2007.

**Fiscal Impact**

A modest attempt was made to assess the likely fiscal impact of the EPA. Reduced government revenue is likely to negatively impact the government's ability to provide basic social services unless alternative sources of revenue can be identified to replace lost trade revenue. Referring to Jamaica's experience with the IMF for 18 years, the indications are that the fiscal impact will be most acutely felt by the poorest and vulnerable groups, including single female headed households and their families, who are already in the poorest quintile. So too will men and women living with disabilities; men and women who are HIV positive, and government employees, the majority of whom are women.

The study showed the need for more research to analyze the percentage of government revenue likely to be lost during the various phases of tariff reductions. In addition, the government will need to develop a coordinated response to the likely loss of tariff revenue. It is anticipated that this will result in a reallocation of resources which could mean less social spending. It could also mean finding alternative sources of revenue, and restructuring the trade tax regime to meet the inevitable shortfall in revenue. If this scenario proves true, taxes are likely to increase and poor female headed households will also be negatively affected. In addition to the direct impact on jobs, which could be lost (or gained), there are also likely to be indirect gendered effects, given women's and men's differential access to non-material resources and status. Women are likely to contribute more to the unpaid care economy as part of their unpaid labour in the household.

## Conclusions and Recommendations

***Conclusions:***

1. The study concludes that the net effect of the EPA on women and women's rights is still unknown as the absence of micro-data on the services sector, the informal sector and some areas of the productive sector are not available. This study shows that further research and analysis are needed of the productive sector to assess the gender impact from production and consumption perspectives.

2. The immediate direct effects of EPA trade liberalization on the Jamaican economy might be limited because the majority of the goods scheduled for immediate liberalization have either zero-rated or low tariffs. However, inter-regional trade with CARICOM, and indeed, with other trading partners are likely to be impacted.

3. Gender sensitive goods to be liberalized in the medium term (2011-18 or 2011-23) are: Cement (excl. white), and Textiles & Apparel (various kinds). This leaves a window of nine years to plan and prepare for adjustment as well as to mainstream gender in the implementation phase of the EPA. Similarly, preparations will also need to be made for the goods and services to be liberalized in the longer term.

4. Awareness of the linkages between gender and trade as well as the details and possible impact of the EPA remain unknown to large sections of stakeholders in government, the private sector and civil society. This severely limits the country's ability to prepare for the changes, challenges as well as opportunities.

5. Technical capacity to conduct a gender analysis of trade and the EPA is available but needs to be expanded to support adjustments across all sectors. Among the specialist skills available are a Commonwealth Secretariat Technical Resource Officer seconded to CARICOM, gender and trade economists and specialists available as consultants, academics and researchers, as well as in civil society in Jamaica and Barbados (Caribbean Policy Development Centre). Gender and Trade manuals and other publications as well as websites are available for reference. At least two recent research studies are now available. These and other resources can be used to build technical capacity across sectors.

6. Resources to fund the EPA adjustment are limited given the impact of the current global recession, high debt servicing (54% of the budget), the deteriorating fiscal deficit (J$40 billion between April – December 2007) and the impact of hurricanes and floods (Damage and losses from Hurricane Dean in 2007 were estimated at J$23 billion).

7. The EPA will have a differential impact on males and females because of their respective concentrations in the productive and services sectors, their positions in the labour market and household. Males dominate the productive sector and females, the services sector. Women's lower labour force participation rates,

higher levels of unemployment, lower rates of positions as employers, and higher rates of involvement as unpaid workers places them in a weak position in the labour market. Their higher rate of participation as public sector workers also makes women more vulnerable to job losses resulting from reductions in government venue. Their dominance in the informal sector and in micro and small businesses make them less eligible for social protection support and more vulnerable to inflation and price increases. However their higher education positions would likely enable them to take advantage of temporary employment in Europe.

8. The number of women in agricultural production is fewer than the number of men. The profile of rural women shows that they are employed in the production and marketing of a narrow range of crops (vegetables especially), the rearing of small livestock (e.g. poultry), the harvesting of coffee and the marketing of food. They have limited access to credit, technical assistance, marketing and technology, which undermines their competitiveness, productivity and income. Their lower levels of participation, power and decision-making in agricultural organizations and in local and national government, limits their ability to leverage resources to improve their practical needs (e.g. water), as well as their strategic needs for empowerment to radically transform both their conditions and their position in the labour market and society.

9. The higher rates of *poverty* in rural areas (20% compared to 9% in urban areas and 9% in Other Towns), coincides with the higher rates of poverty in the distribution of poverty across regions (66% of rural areas, 21% in the KMA and 13% in Other Towns).

10. Almost half (47%) of households surveyed reported females as head. The number was highest in the KMA (55%) compared to 42% in rural areas and 43% in Other Towns. The mean household size of female headed households is higher than the national average of 3.6 persons: in rural areas it was 4.1 persons compared to 3.3 in KMA and 3.2 in Other Towns (JSLC, 2006: 6-7).

11. From the producer side, local agricultural products are on the EPA Exclusions list which provides local producers with some protection from cheaper food imports. The viability of agricultural operations for rural women may not however be profitable, given the challenges to their productive capacity as described above.

12. Climate change also presents additional burdens for rural women especially. Vassell (2009) in a case study on the gender dimensions of climate chance and disasters in rural communities in Jamaica[1] showed that women are more vulnerable than men. They have less access to resources to prepare for and recover from natural hazards such as hurricanes, floods and droughts which completely wipe out their source of livelihood.

13. Unequal levels of development between rural and urban areas are reflected in: lower rates of enrolment in rural schools and education institutions. Rural

[1] Vassell L. (2009), Gender Climate Change and Disaster Risk Management: Case Study for UNDP Caribbean Risk Management Initiative.

communities also suffer from poor road infrastructure and fewer basic services (education, health, social services).

14. With regard to education and formal qualifications, women are also more likely than men to have university degrees, and certification. This places them in a better position to take advantage of most of the 29 categories in the temporary workers programme.

15. From *the export of services perspective,* they are therefore more likely than men to be eligible to take advantage of the emerging employment opportunities in the EU. However, this can only be ascertained when micro data on the services sector is available and a detailed assessment can be conducted. Their ability to take advantage of these jobs will however be influenced by other eligibility criteria as well as their ability to make provisions for the care of their dependents (children and the elderly etc.).

16. The reciprocity of the EPA also means that from the *import of services* perspective, local women seem more vulnerable than men to competition from EU nationals in the 29 categories, as they appear to be more heavily concentrated in most areas identified. This could mean a loss of jobs locally which would increase the risk of poverty, especially in single female headed households.

17. From the *production of goods* perspective, they may be negatively impacted by foreign investment in certain sectors.

***Recommendations:***

1. **Mainstream Gender in Trade Policies and Negotiations.**
   The MFAFT should make a commitment to *mainstream gender in trade policies and negotiations.* This would ensure consistency between trade and development policies for which the Ministry has reporting responsibility. The latter includes Jamaica's international commitments to human rights, gender equality, international labour standards and global development goals.

2. **Mainstream Gender in the Implementation Process of the EPA**
   That the MFAFT in partnership with the BWA, CARICOM, the Commonwealth Secretariat, academics, private sector agencies and civil society groups should embark on a process to *mainstream gender in the implementation process of the EPA.* BWA's participation in the Joint Consultative Committee on Trade and Development offers such a mechanism. Gender Mainstreaming in the MFAFT would include the following activities:

   a. Research and data collection to fill gaps and to have a comprehensive gender impact assessment of the net effects of the EPA to identify winner and losers. Priority areas for research include:

      - Collection and analysis of *sex disaggregated micro-data* on the services sector;

- Conducting a series of EPA-related *gender impact assessments* on the services sector, the productive sector (e.g. manufacturing, mining, agriculture);

- Conducting research on the *fiscal impact* of the EPA and how the government is likely to meet the inevitable shortfall in revenue to maintain social services expenditure at levels required to meet MDG targets and the Jamaica 2030 Development Plan. This provides an opportunity for advocacy of women's organizations and other social sector groups to guide revision of the Budget process and estimates, *to protect social services.* There is likely to be a widespread impact on the female-dominated public sector as some jobs will be lost while others will be gained but the net effect is difficult to determine. Modernization of the public sector which is already underway, will continue to make the sector more compatible and responsive to EPA demands;

- Conducting a *gender review of the CRNM sector assessments* already completed and to make recommendations to address any gaps identified;

- *Market research and export assistance.* This may be required to penetrate EU markets as well as training in foreign language skills is also recommended. Training classes should facilitate the participation of working mothers.

b. Creation of an *electronic resource database* that would include reports of these assessments, and previous research on gender and trade in the Caribbean, for use by various sectors.

3. **Develop Tool to Monitor Trade Policy**
   *Development of a policy monitoring tool* to serve as a guide for trade negotiations, support the development of gender and trade indicators, as well as monitoring of the EPA implementation process. This could be a joint effort by the Bureau of Women's Affairs and the Institute for Gender and Development Studies Mona Unit at the UWI.

4. **Organise Cross Sectoral Trade Consultations**
   The aim of these consultations would be to facilitate dialogue and feedback on the EPA which will be very important, as different interest groups stand to gain while others may lose. For example, consumers may welcome cheaper imported products but local manufacturers may be displaced by competition which would result in job losses. Dialogue with professional associations and other groups to be impacted is also important. These consultations can also serve to monitor EPA implementation. This forum also provides women's groups with opportunities for advocacy and monitoring.

5. **Organise Public Education and Training**
   Build awareness of the EPA and create linkages between gender, trade and development across all sectors, including the main institutions responsible for negotiating and monitoring the Agreement through public education and training.

6. **Provide Technical Assistance**
   Provide support to sectors and institutions that are likely to be impacted, that will need to make adjustments in preparation for EPA trade liberalization**.** Targeted assistance to sectors dominated by women would include technical assistance, financing and training for women in micro and small businesses, women in agriculture, and women in the informal sector to enhance their global competitiveness. Targeted assistance to sectors dominated by males to be impacted would include for example, enabling cement manufacturing to be prepared for trade liberalization.

7. **Provide Financial Resources**
   To support EPA-readiness, some funds are available under the $10^{th}$ EDF, but this would mean reallocating from areas that have traditionally used these resources for development programmes. The Commonwealth Secretariat has indicated a willingness to support gender mainstreaming in EPA implementation as a follow-up to this study. No doubt DFID which funded the study could also be approached, as well as UNIFEM which funded another study on gender and the EPA in three Caribbean countries.

# 1. Introduction and Background

## 1.1. Introduction

This study assesses the gender impact of trade liberalization and the EU-CARIFORUM Agreement on women's rights in Jamaica. It is part of a joint One World Action-Commonwealth Secretariat project which aims to put trade issues on the agenda of Economic Partnership Agreements (EPAs). It also sought to determine the impact of trade liberalization (particularly EPAs) on women's rights in three selected ACP countries: Tanzania, Mozambique and Jamaica. The general project also includes regional capacity building workshops to discuss research findings and recommendations and develop advocacy strategies. The results are designed for advocacy in the Caribbean and in Europe to ensure EPAs support equitable development.

Globalization has created greater interdependence between countries, transnational companies and communities, resulting in the concept of a *'global village'*. The revolutionary convergence of telecommunications and computer technologies has facilitated the integration of global production, financial and marketing systems, while creating new jobs and ways of working. Trade liberalization, another feature of globalization, is part of a neo-liberal strategy ostensibly to build capacity, and global competitiveness of developing countries. EPAs are part of the trade liberalization strategy that enables corporations to expand overseas markets for their goods and services. The EU-CARIFORUM EPA was the first such agreement to be signed between the European Union and its former ACP partners.

No gender impact assessments were conducted while the EU-CARIFORUM EPA was being negotiated or before it was signed on October 15, 2008. Jamaica was therefore used as one of the case studies of the likely gender impact of the EPA as trade is not gender neutral: there are winners as well as losers.

### *1.1.1 Research Objectives and Scope*

The main objective of the Jamaica study was to assess the likely gender impact of the EU-CARIFORUM Economic Partnership Agreement on women's rights and development. The gender impact of trade liberalization and the EPA on the national economy was therefore assessed in relation to the possible effects of import competition/increased imports, and loss of revenue on nationals, as producers and consumers and on their gender roles in society. Analysis of women's and men's positions in the labour market and their employment in key sectors, helped to identify likely areas of job gains and job losses. Possible effects of the removal of tariffs on government revenue and expenditure and how this was likely to impact men and women were also examined.

### *1.1.2 Methodology*

The data collection process involved:

a) A comprehensive desk review as well as internet research to identify:

- accurate statistical reports and databases, to develop an economy-wide description of the gendered structure of Jamaica's economy and the country;
- available literature on gender and trade;
- existing quantitative and qualitative studies on gender biases of economic institutions and policies that were considered relevant;

b) Visits to a number of institutions to interview representatives to fill gaps (See Appendix L for list of institutions);

c) Analysis of available socio-economic, trade, and labour data, (disaggregated by sex where available). Data were analyzed on outputs, imports tariffs, as well as gender characteristics of the labour force, etc;

d) Tables were prepared on the import component of each sector and as far as possible data were disaggregated by sex to identify the male and female composition of the workforce to determine the degree of gender-based labour market segregation;

e) Efforts were also made to collect and analyze statistical data on women's time burdens in paid and unpaid work and socio-economic characteristics. Qualitative studies were used as statistics were unavailable;

f) Data were also collected on the size and composition of government expenditure calculating information on import revenue as a share of government revenue, social spending as a share of total spending and other similar characteristics. In the absence of a formal gender responsive budget, an attempt was made to determine the gender impact of government expenditure patterns to assess the likely impact of the EPA's trade liberalization process over time on single female headed households who are among the most vulnerable as poverty is feminized;

g) Studies on rural women and women in the informal sector were also reviewed and main characteristics highlighted to provide an overview of the labour market, the nature of employment relations in various sectors and in household farms, working conditions. Factors that outlined gender biases in the labour market were noted. Efforts were also made to provide data on women's access to land other resources, and marketing facilities.

The statistical data were based on the Jamaica Industrial Classification (1987) which broadly classifies two groups: the *Goods Producing* Sector and the *Services* sector. Seven main occupation groups were derived from the Jamaica Standard Occupational Classification (JSOC).

**Data Analysis**

Available data on government expenditure were used to identify sources of revenue and expenditure; the allocation of expenditure on education and health to assess the likely impact of loss revenue for providing basic social services; and education certification data, to assess the likelihood of males and females taking advantage of temporary employment opportunities in the EU; assessments of male/female intensity in sectors for which data were available. In the absence of statistical data, qualitative studies were used as a reference for information on women's and men's access to productive resources such as land, credit, technology[2],[3] marketing and information facilities as well as working conditions and labour market characteristics. The analysis of trade and labour statistics focused on: outputs, imports as a proportion of domestic consumption, tariff rates, exports as proportion of total output; labour as a share of value added, female and male composition of the labour force, unskilled workers (male and female) as a share of the total labour force.

**Understanding Gender and Trade Liberalization**

Eudine Barriteau (2001) notes that gender is "the complex systems of personal and social relations through which women and men are socially created and maintained and through which they gain access to or are allocated status, power and material resources within the society" (Barriteau: 2001). Gender roles and expectations influence women and men's access to and benefits from the economy. Relations of gender in the Caribbean are influenced by class, ethnicity, colour and nationality as well as the global economic environment. The material relations of gender result in both sexes having a differential access to resources, which impact their development. Gender inequalities in Jamaica, result in higher levels of poverty among women and rural communities, and gender discrimination in the labour market.

Marzia Fontana's "Analytical Framework for the (ex ante) assessment of the gender effects of EPA's in selected ACP countries" (Fontana, 2007/8) was used to guide the study and is examined in more detail later in this paper. Williams (2003) also provides a framework for policy analysis and programme design to assess the gender impact of trade policies. Williams notes that to achieve equitable social and human development, policy makers need to understand the impact that changes in trade policy can have at several levels: accumulation and growth at national and private levels; livelihoods and poverty, as trade policy can exacerbate, create or eradicate poverty; and social and human development, gender equality and equity as well as the environment (Williams 2003:160-161). She notes that trade policy can create new opportunities, expand existing ones or destroy opportunities for women and men. Protecting entitlements and rights and ensuring access to assets and government services is important. Williams further noted the potential impact on: agriculture, food security, food sovereignty, rural development and sustainable livelihoods. In services the impact could be on access to health care and natural resources such as water and fuel. For investment, Williams highlights the importance of ensuring the survival and long term growth and prosperity of women-owned small and medium sized businesses, the quality of male and female employment in the export enclave sectors and ensuring that foreign investment has an overall development-promoting impact (Williams 2003: 165-166).

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[2] Dunn, H S (2008) notes the positive economic opportunities for poor men and women through several entrepreneurial opportunities related to the sale of phone cards, cases, repairs, housing cell sites and equipment; use of mobile phones to explore work opportunities. He also notes the opportunities for mobile usage such as mobile phone banking, multi-messaging, mobile broadband applications and digital photography (Dunn 2008: 34-35).

[3] Dunn H. S and Dunn, L. L. (2007) in a national household study on mobile telephony 95% of women and 93% of men used a cell phone in the previous three months. Some 69% of persons in the sample had used a mobile phone for more than four years (68% males and 72% females). Broadband internet usage was low averaging only 20% across all age ranges and both. Paulwell (2006) citing a study by UNDESA notes that in 2006 the number of internet users in Jamaica was 1,067,000 (40%) of the population.

### *1.1.3 Limitations of the Study*

The main challenges related to the absence of sex disaggregated data on the female-dominated services sector which is the most female intensive sector and most likely to be impacted by the EPA. Absence of available data on some goods producing sub-sectors, the informal sector and on rural women also limited the analysis. Neither national time-use surveys nor gender budgets were available and as such, secondary sources and some interviews were conducted to fill the data gaps. Limited analysis was done on macro data available for the Tourism and Distributive Trade sub-sectors, to give an indication of the likely gender impact of the EPA on these components of the service sectors.

### *1.1.4 Structure of the Report*

*Chapter 1* provides the background, and context for the study, an overview of the EPA-CARIFORUM agreement, the conceptual, analytical and human rights frameworks used to assess the gender impact of the EPA.

*Chapter 2* provides a socio-economic and demographic profile of Jamaica to understand the context in which the analysis was conducted. Sex disaggregated data are presented on the population, the labour market, the macro-economy and sectoral performance. These highlight pre-existing gender inequalities and guide the interpretation of statistical data presented in Chapter 4.

*Chapter 3* examines the gender profile of human development, poverty and leadership as well as government revenue and expenditure. This data complements information on gender inequality in the labour market, and together supports the assessment of the likely gender impact of the expected loss of tariff revenue on employment, and access to basic services such as water, sanitation, roads, etc.

*Chapter 4* presents the analysis of the gender-sensitive products and how these are likely to be impacted by the EPA at several levels. The chapter includes:

a. an overview of the EPA schedule for liberalization;
b. a list of gender-sensitive products using the criteria developed;
c. analysis linking (a) and (b) to assess how key sectors, and products are likely to be impacted by the EPA trade liberalization schedule over time;
d. analysis of the likely production and consumption effects of the EPA on gender sensitive goods and services.

*Chapter 5* presents the Conclusions and Recommendations. The main conclusion is that the net gender effects of the EPA cannot be fully ascertained until a more comprehensive gender impact assessment of the EPA is done. This requires the collection of sex disaggregated data on the services sector, the informal sector and on unwaged work, which were not available. The preliminary report shows that the productive sector is likely to be less directly impacted than the larger female-dominated services sector.

The study also indicates that implementation of the EPA will be hampered by limited government resources. This is linked to reduced trade revenue from tariff reductions, the global economic recession, and the country’s crippling debt burden among other factors. Unless a gender-sensitive policy is used to implement the EPA, it is likely to entrench rather than transform gender inequalities in the labour market and in society.

The loss of tariff revenue is also likely to reduce government funding for basic social services. Trade reciprocity may also result in the privatization of basic services with investments from foreign companies. This could make them less affordable to the majority of citizens. The social groups most likely to feel the impact would be public sector workers, the majority of whom are females who may be laid off. The poorest households are also likely to feel any changes. The majority of these households are headed by single females in low paying jobs.

Among the recommendations are: collection and analysis of sex disaggregated data on the services sector and the informal sector; using this data to conduct a more comprehensive gender impact assessment of the EPA; greater policy coherence to ensure that the EPA supports national development policies, respects human rights commitments and facilitates the transformation of sectors as they prepare for EPA-related changes and to embrace opportunities.

## 1.2. Background

### *1.2.1 Globalization, Gender, Trade and Development*

Economic Partnership Agreements (EPAs) have been promoted by the European Community as part of its Global Europe Strategy. Trade reciprocity represents a major policy shift in the relationship between the EU and ACP countries. The EPA aims to increase the competitiveness of European multinationals by expanding their access to overseas markets and to modernize the economies of ACP countries and increase their capacity to participate in a liberalized, competitive, global trade environment.

The main elements of this new Free Trade Strategy include: targeting emerging markets in Asia (China and India), protecting intellectual property, improving market access strategy to ensure that European companies have better access to major public sector procurement markets and reforming the EU's anti-dumping and other trade defense instruments. EU Trade Commissioner Peter Mandelson underscored the importance of Europe's "Economic strength at home" and the need for "activism in opening markets abroad" (2006).

**Understanding the Nexus between Gender, Trade and Development**
This gender impact assessment of the EU-CARIFORUM Agreement is guided by the following analytical framework:

**An analytical framework for the (ex-ante) assessment of the gender effects of Economic Partnership Agreements In selected ACP countries (Marzia Fontana, 2008)**

Trade policies will have a gender differentiated effect because of women's and men's different access to, and control over, resources, and because of their different roles in both the market economy and the household.

Gender inequalities have various dimensions[4]. At the macro-level it involves examining the gender division of the labour force between the different productive market sectors and the reproductive sectors; At the meso level there are institutions that help structure the distribution of resources and activities at the micro-level – this involves examining gender inequalities in public provision as well as gender biases in the rules of operation of labour, commodity and other markets; At the micro-level, it examines the gender division of labour, resources and decision-making, particularly within the household.

Trade liberalisation alters the distribution of income between different social groups, and between women and men, primarily by changes in the relative prices of goods. By modifying incentives, it induces reallocation of factors of production among sectors that use them with different intensities and results in changes in employment and/or remuneration, which further affect consumption patterns.

The most important issues to consider when assessing the likely impact of EPAs are the import competition effect and the revenue effect: The strength of these effects will be determined by the extent to which imports will rise and their prices in ACP markets decline. The gender distribution of these effects will depend on a number of factors:

- Import competition effect: The gender composition of the labour force in those sectors that are especially sensitive to import competition. Women wage workers or small producers are likely to be negatively affected if they are disproportionately employed by the sectors that contract and if their opportunities to find employment in other sectors are limited due to gender based labour segregation.
- The revenue effect: Loss of government revenue from reduced tariffs may undermine gender equality if it leads to reduced public provision of social services that favour women such as health, education, water, sanitation and other infrastructure to meet household needs. Even if the government manages to replace tariffs with alternative indirect taxes, these may have a gender differentiated impact (for example, in Kenya, a new tax on kerosene seems to have considerably added to women's burdens by forcing poor households to switch to wood as source of fuel and increasing women's time spent on its collection — Jane Kiringai KIPPRA).

**Framework for a Comprehensive Economy-Wide Gender and Trade Analysis**

**Step 1:** Draw a stylised picture of the gender structure of the economy, particularly focusing on trade and labour statistics and by using a high level of sectoral disaggregation: e.g.: agricultural sector (with a number of agricultural crops); manufacturing sector (distinguish between food processing, textiles, electronics, etc).

**Step 2:** Provide data for each sub-sector on: output, imports as proportion of domestic consumption, average tariff rate (total tariff revenue to total imports), exports as proportion of total output, labour as share of value added, female workers as share of the total labour force, unskilled workers as share of the total labour force, female workers as share of the unskilled.

**Step 3:** Analyse this data by relating the import sensitiveness of each sector to its female intensity and by calculating indices of gender-based labour market segregation.

**Step 4:** Provide additional information on women's time burdens in both paid and unpaid work, possibly disaggregated by rural/urban location and other socio-economic characteristics

[4] See Elson and Evers (1996a) – the approach used is to distinguish a macro meso and micro level of analysis

to understand the extent of women's time constraints and would give an indication on what are their obstacles in responding to economic change.

**Step 5:** Provide qualitative data on differential access by women and men to land and other resources, to marketing facilities and to information on prices would be useful, as well as any other information on working conditions and labour market characteristics.

**Step 6:** Calculate the revenue loss predictions by using data on the size and composition of government expenditure to predict the likely gender effects of the loss of tariffs revenue under a range of possible government's alternative responses.

**Step 7:** Use existing analysis related to gender budgeting as a source to draw on for those countries that have promoted such initiatives.

Adapted from Fontana (2008).

As previously indicated, this analytical framework, presented several challenges for implementation. Part of this related to the absence of sex disaggregated data at the micro level in several important sub-categories of goods and especially of services. Also, there were neither *time-use surveys* nor gender budgets, but efforts were made to conduct this analysis.

**Policy Commitments to Human Rights, Gender Equality and Development**

EPA Implementation takes place against the background of several international commitments to rights-based and equitable development. Among these are:

- The Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) and other core human rights agreements;

- The Millennium Declaration and the Millennium Development Goals (MDGs), which include MDG#3 – the promotion of gender equality and the empowerment of women. Specific targets for MDG#3 include: i) the elimination of gender disparity in primary and secondary education ii) equal opportunity, iii) equal ownership and control over productive assets, iv) freedom from drudgery, v) equal representation in decision-making and vi) freedom from the threat of violence;

- ILO Core conventions that promote gender equality in employment and the rights of women workers; International Labour Standards and the *ILO's Decent Work Agenda.* The latter is based on: Equality in employment opportunities; Equality in social protection; Equality in social dialogue and tripartism; and the Elimination of child labour (C138 and 182).

**National Policy Commitments to Development**

Jamaica has also developed several policies and drafted legislation to support gender equality, poverty reduction and development. Among these are: the *Jamaica 2015* Plan for Development; the Medium Term Social and Economic Development Framework; the National Poverty Eradication Programme and Strategy, the National Strategic Development Plan "***Vision 2030 Jamaica***" and the National Gender Policy. In addition, policies and legislation have been developed that guide the operations of major economic and social sectors to promote growth and reduce poverty. Policy commitments for major sectors are addressed later in this report.

**Major Sectoral Commitments**

**JAMAICA'S TRADE POLICY FRAMEWORK**

MINISTRY PAPER No.69 outlines Jamaica's New Trade Policy (2001) noting that it is aimed at diversifying exports, facilitating market penetration and diversify imports to increase returns from overseas assets. The institutional framework for the policy is the Ministry of Foreign Affairs and Foreign Trade Communications, Science and Technology, Finance and Planning, Tourism, Agriculture and Development. A Jamaica Trade and Adjustment Team (JTAT) supports implementation of the policy in the MFAFT. The team includes the Private Sector Organization of Jamaica's Trade Policy Committee and the Association of Development Agencies (ADA) a civil society umbrella organization.

**Jamaica's** National Industrial Policy (NIP) implemented in 1996, provided the broad framework for macro-economic and social policy formulation. This framework promoted the maintenance of macro-economic stability; the implementation of sector-specific measures to facilitate economic adjustment; infrastructural development; enhanced international competitiveness and the development of human capital through education and training.[5] The NIP was the first national policy to be engendered.

**Gender-Sensitive Trade**

The concept of gender-sensitive trade stands in opposition to the traditional view that trade policies are gender neutral. This means that they will have the same impact on males and females. Instead, it is recognized that they will have a differential impact because of the gender roles assigned to each sex and their positions as groups in the labour market.

The criteria used to assess "Gender–Sensitivity" in Trade were guided by the following questions:

a) How will the EPA impact the goods producing sector, the services sector and government revenue resulting from trade liberalization and the removal or reduction of tariffs?
b) What new jobs will be created or lost in the various sectors from trade liberalization?
c) What is the dominant sex in the labour force in each of the major sectors and sub-sectors?
d) What are the wages and working conditions like in the sectors dominated by men and by women?
e) How is any loss of tariff revenue likely to impact employment in the various sectors, as well as the public sector?

[5] http://cpqrack2.sice.oas.org/ctyindex/wto/Jamaica/govreport_e.doc

f) How will the loss of revenue impact government's ability to provide basic social services for the poorest and most vulnerable groups in society which includes female headed households?

Operational definitions for products (goods) or services being gender-sensitive were as follows:

*Production effects*:

- That the sex composition of the labour force used to produce the good or service is either overwhelming male or overwhelming female;
- That the level of wage discrimination in that particular sector is known to be high/low;

*Consumption effects*:

- The good or service in question is essential to the well-being of the household. Also, females have major decision-making responsibility for the purchase or use of the product or service.

Based on the availability of data for analysis, the study focused primarily on women and men's employment in two important sectors: agriculture, manufacturing and to a lesser extent, services.

### *1.2.2 Jamaica's Trade Liberalization Agenda since the 1990s*

Faced with the social and economic challenges of globalization, successive Jamaican governments have struggled during the last two decades to find the right policy balance between debt reduction and fiscal reform, economic restructuring and improved competitiveness, poverty alleviation and social stability (Byron and Lewis, 2007). Nonetheless, there have been over twenty years of stagnant growth. Jamaica is currently ranked 101 out of 177 countries (UNDP 2007/2008). This is an improvement on its previous ranking of 104 out of 177 countries on the Human Development Index (UNDP 2006). An estimated 19% of the population is listed as living below the poverty line (World Bank 2007). Jamaica's GDP growth rate since 2000 has hovered at around 2% and the official unemployment rate in 2007 was 10% (PIOJ 2006, 2007). The unemployment rate for women in 2007 was 14.5%. This was more than double the male unemployment rate of 7% (PIOJ, 2007). Moreover, the largest group of unemployed persons consists of young women between 14 and 24 years. The main obstacle to economic growth is a heavy debt burden which amounts to over 150% of GDP. Debt servicing consumes approximately 50% of the recurrent budget and severely limits other public expenditure (EU 2004). Other interactive factors militating against growth have been a very high crime rate and the declining competitiveness of major export industries.

**Trade Policy**

Details of Jamaica's trade policy and macro-economic profile are revisited in later sections of this report. The trade policy does not address equality, but is mentioned here to indicate the context in which Jamaica's trade and development policies have been formulated since the 1990s and their gendered impact. Such policies have sought to revitalize economic growth, attract foreign investment, strengthen the private sector, create jobs and reduce poverty. Production, trade and development policies were based first on the *National Industrial Policy 1996 – 2010,* which identified five strategic clusters: tourism, shipping/berthing, agro-processing, textiles and apparel, bauxite and alumina. In an effort to promote further economic diversification and higher levels of competitiveness, the policy was modified. Its replacement, the *New Trade Policy 2001* emphasized support for non-traditional export sectors like fashion and design, entertainment and other cultural products and professional services (PIOJ 2005). It was noted in 2005 that such exports, including non-traditional agricultural products, accounted for only 25% of the value of traditional exports but had shown a stable performance for the previous five years (PIOJ 2006a). These present opportunities for might therefore point the way to new competitiveness in micro and small businesses for the Jamaican economy.

**Trade Liberalization**

Trade liberalization was first initiated in the context of the structural adjustment and economic reform programmes of the 1980s and 1990s (World Bank 2003). By 2004, Jamaica's Applied Most Favoured Nation (MFN) tariffs had been reduced to an average of 9% (WTO 2005). While the average effective applied tariff for non-agricultural goods was 7%, it should be noted that for agricultural goods it was much higher, averaging 18%. Overall import duties amounted to some 30% (WTO 2005, 2006). The justifications for the higher levels of protection are food security, employment, poverty alleviation and rural development. The employment effects of the protection are likely to be greater for the male population since agriculture accounts for 25% of the male workforce, but only 9% of the female workforce (PIOJ, 2007). As a result of trade liberalization, merchandise trade grew at an annual rate of 2% between 1998 and 2005 (WTO 2005). However, Jamaica's external trade deficit also increased by over 60% during that period.

**Trade Agreements**

Jamaica is a signatory to the General Agreement on Trade in Services (GATS). Its market access conditions in most service sectors are reported by the WTO to be actually more liberal in practice than the terms it has signed on to in the GATS (WTO 2005). Jamaica has an open investment regime which offers various tax and duty concessions to investors. Successive government administrations have sought to upgrade the legislation and the institutions pertaining to foreign investment inflows. The government has also sought to strengthen its trade regulatory infrastructure. Customs administration has been significantly modernized since the 1990s, and both at the national and CARICOM levels, the Jamaican authorities have worked to strengthen standards and quality control bodies and to upgrade the country's Sanitary and Phytosanitary legislative and infrastructural capabilities. Since 1998, legislation has been passed to enable contingency measures to be taken to safeguard domestic producers. There is now an Anti-Dumping Commission which has imposed measures against certain categories of imports on a number of occasions since 2001.

The CARICOM Single Market and Economy constitutes the first circle of Jamaica's trade policy regime. The provisions of the CSME Common External Tariff as well as other CARICOM multilateral agreements regulate Jamaica's trade relations with third countries[6]. Most CARICOM products enter Jamaica duty-free. However, this does not

[6] Jamaica's CARICOM/CSME trading partners are Antigua and Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, St. Lucia, St Kitts and Nevis, St. Vincent and the Grenadines, Trinidad and Tobago, Suriname. The Bahamas is not a signatory to the

mean that CARICOM constitutes a major destination for Jamaica's trade in goods. In 2005, 32% of Jamaica's merchandise exports went to the European Union, 21.5% to the United States, 19% to Canada, 11.8% to China. Less than 5% went to CARICOM (WTO 2006, INTAL-IDB 2005). The CSME has been more significant for Jamaica in terms of investment flows and as a labour market. Jamaica has been one of the major recipients of Trinidadian and Barbadian investments and some of its own firms, mostly in financial services have set up establishments in other CARICOM countries (CARICOM 2005). Anecdotal evidence also suggests a significant movement of Jamaican workers across the CARICOM region, particularly of so-called "unskilled" workers. Women feature prominently in this movement which targets the tourism and entertainment sectors, community and personal care services and the distributive trades particularly in the North Eastern Caribbean territories.

Jamaica is also part of CARICOM preferential trade agreements with Venezuela (1991 and 2005), Colombia (1994), the Dominican Republic (2001), Cuba (2003), Costa Rica (2006). CARICOM (2005) notes that these trade agreements have not yet stimulated significant increases in trade with Latin America. One exception is the PetroCaribe Accord of 2005 which enables Jamaica to receive consignments of Venezuelan oil at concessionary rates based on a deferral of the full market price payment to some time in the future. Finally, Jamaica together with the rest of CARICOM, has had non-reciprocal, preferential access to the markets of the United States (CBI-CBERA legislation 1991, Caribbean Basin Trade Protection Act 2000), Canada (CARIBCAN 1986) and the European Union (Lome I – IV: 1975 – 1999, the Cotonou Partnership Agreement: 2000 – 2020). These preferences are being steadily eroded in the current international trade policy environment. From 1998 – 2004, Jamaica participated in the failed initiative to negotiate a Free Trade Area of the Americas which would have replaced the preferential arrangements with North America.

### *1.2.3 Background to the CARIFORUM-EPA Agreements*

**The Economic Partnership Agreement (EPA**) with the European Union is a phased trade liberalization arrangement which replaces the 2000 – 2007 transitional period of non-reciprocal, preferential market access to the European Community for all ACP countries. This phased arrangement may have considerable implications for the trading relationships of the countries of CARIFORUM[7] with third countries and among themselves.[8]

The final circle of Jamaica's international trade policy is that of the World Trade Organization. In the WTO and other fora, Jamaica has worked with other Small and Vulnerable Economies (SVEs) as a special category, and to expand the scope of

CSME agreement, Montserrat has not assumed full CSME obligations and Haiti has not yet begun to implement CSME obligations. The CSME commitments include a CET, the intra-regional liberalization of flows of goods, services and capital and the phased liberalization of labour flows, starting with graduates of regional universities, media personnel, sports men and women, entertainers and health professionals. For more information on the implementation of the CSME, see INTAL-IDB (2005) and CARICOM (2005).

[7] CARICOM countries and the Dominican Republic comprise the CARIFORUM, a grouping that exists purely within the context of EU-Caribbean ACP relations and was formed for that purpose in 1991. Haiti will sign at a later date.

[8] In 2009 CARICOM was entering trade negotiations with Canada and would possibly at a later date, with the United States. The liberalization agreement signed with the EU will inevitably serve as a precedent in such talks. Moreover, the MFN provisions in the EPA are already controversial. Some third parties, notably Brazil, have threatened to challenge them in the WTO. Finally, some EPA critics argue that the arrangement may adversely affect intra-regional trade. Others, however, feel that the liberalization process could break down economic barriers in the CARIFORUM area, ultimately strengthening regional integration.

Special and Differential Treatment (SDT) available for such economies. Jamaica's efforts have included attempts to protect and prolong, as far as possible, the country's preferential access to export markets, thereby gaining maximum time for economic adjustment. Domestic policy discussions on SDT have been conflicted. While there is much support for propping up sectors like sugar and bananas because of the social fall-out emanating from their decline, there is also a concern to build international competitiveness and to transform the economy away from inefficient traditional export sectors.

**The History of Jamaica-EU Agreements and Trade Relations**

Jamaica, as a member of the Africa-Caribbean-Pacific (ACP) group of countries was a signatory to Lomé Conventions I – IV that regulated ACP trade and development cooperation with the European Community, later the European Union, from 1975 – 2000. In these agreements, trade and development cooperation were closely integrated. The Lomé record of achievement was mixed. The EU-ACP relationship is a highly asymmetrical one. The arrangement fostered dependence and led to a failure to diversify out of uncompetitive commodity exports. On the other hand, EU-ACP development cooperation made a significant contribution to human development for the past three decades.

For Jamaica, development cooperation has been a significant aspect of its relationship with the European Union. It is estimated that between 1975 and 2006, Jamaica received 666 million Euros in financial assistance from the European Union.[9] EU aid was designed to support Jamaica's national development strategies, and in this context, it focused on poverty alleviation, infrastructural development, macroeconomic reform, private sector development and support to the transport sector.[10]

Lomé gave way to the Cotonou Partnership Agreement (CPA) in 2000. This agreement will last until 2020. The objectives of the new agreement included the promotion of sustainable human development through poverty reduction and enhancing the political dimensions of development[11]. Another prominent objective of the CPA was to integrate the ACP countries into the world economy and to ensure that EU-ACP trading arrangements were compatible with WTO rules. The provisions emphasize the importance of improving the competitiveness of ACP economies and strengthening regional integration. The CPA approach differed from that of Lomé. While development assistance would continue to be governed by the provisions of the CPA, following an eight year transitional period, it was envisaged that free trade would gradually be phased in by the adoption of Economic Partnership Agreements with all ACP regions.[12]

Jamaica's five leading trade and investment partners in the European Union are the United Kingdom, the Netherlands, Spain, Ireland and France. Merchandise exports to European markets have been dominated for many years by the traditional

[9] This figure excludes bilateral aid from EU member countries, the CARIFORUM regional programme and the benefits from trade preferences. See www.mfaft.gov.jm/?q-jamaica-and-the-european-union-eu .

[10] For EDF 9, Jamaica designated 30% of its NIP funding to road management and another 20% to private sector development programmes. A large section also went to support for macro-economic reform projects. See *Jamaica/European Union ACP Partnership Annual Report 2003.*

[11] Defined as human rights, democracy, the rule of law and good governance.

[12] LDC countries among the ACP had an alternative in the 'Everything but Arms' agreement, if they chose not to participate in an EPA. In the Caribbean, only Haiti qualifies as a LDC member of the ACP Group.

commodities sugar, bananas, bauxite/alumina, and rum. There has been much preoccupation with the declining fortunes of bananas since the late 1990s and sugar since 2004. Preferential market access and duty-free quotas for Jamaican bananas under the Lomé Banana Protocol were progressively eroded during 15 years of legal challenges in the GATT and the WTO by Latin American banana producers and the US. Finally, the EU introduced in 2006 a new Banana regime which eliminated the quota and licensing system for ACP bananas by 2007, replacing it with a straight tariff-based system. The Jamaican banana industry was also hard hit by four major hurricanes between 2004 and 2007, which severely reduced its output. Nonetheless, the sector has benefited from the EU Special Framework Programme of Assistance for ACP Banana Producers – 33.64 million Euros between 1999 and 2005 and 3.49 million Euros in 2006. These funds were intended to improve productivity for banana cultivation and also to encourage rural diversification. Despite this support, following the damage to the banana industry by Tropical Storm Gustav in August 2008, it has been announced that a major player responsible for 90% of Jamaican banana exports to Europe, Jamaica Producers, will significantly reduce its exports to the European market. This has resulted in the closure of estates in the North Eastern part of the island and the loss of five hundred jobs in September 2008 (RadioJamaica.com September 27, 2008; Statement of the Minister of Agriculture to the House of Representatives, Jamaica Information Services, September 24, 2008).

Under the EU-ACP Sugar Protocol, sugar has featured as Jamaica's most significant agricultural export. In 1999, it represented 49% of the country's agricultural exports and 8% of total exports. Sugar workers accounted for over 16% of the total agricultural workforce and almost 2.9% of total employment (H. Chaplin, A. Matthews, 2005). In 2004, following a legal challenge in the WTO to its sugar market regime, the EU announced that it would reduce the prices paid to EU and ACP producers but that the impact on the former would be partly offset by direct subsidies. ACP sugar prices were cut by 36% between 2006 and 2009. The reform had a differentially adverse effect on the ACP suppliers. In addition to the WTO challenge, sugar was also under increasing pressure to be treated more like other commodities. The Sugar Protocol itself will come to an end in 2009 and, for EPA members, be replaced by a phased-in regime of duty free, quota free access to the EU sugar market.

The new regime will continue to provide Jamaica with access to the EU sugar market but its impact may be very different since the country will no longer necessarily have a guaranteed quota. It was projected by the then Jamaican Minister of Agriculture that this would result in income losses of up to JA$ 2.1 billion per annum by 2009 (Jamaica Gleaner 14/03/07). In 2006, the EU announced that between 2006 and 2013, compensatory payments would be made to ACP sugar producers in the form of direct budgetary support, to deal with labour dislocation and the restructuring of sugar industries. Forty million Euros were provided to 18 ACP sugar producers for this purpose in 2006. In March 2007, Jamaica received the first tranche of this money in the form of five million Euros. The money is designated for budgetary support and for addressing the training needs of workers in sugar communities. In June 2008, following the Jamaican government's divestment of five sugar factories to a Brazilian investor, BioInfinity, it was announced that 2.7 billion dollars would be paid by the government in redundancy payments to displaced workers (*Jamaica Gleaner* 14/03/08; CARICOM 2005).

Duty free quota access for rum exports to the EU began to be dismantled in 1997 and the market was progressively liberalized thereafter.[13] In 2000, the EU committed to providing an assistance package to enable the Caribbean rum producers to increase their international competitiveness. The Jamaican rum industry has performed relatively well under this programme, expanding its export earnings by 20% in 2005 (PIOJ, Economic and Social Survey of Jamaica, 2005). This resulted from rising demand in Europe and in Mexico.

**The CARIFORUM-EU Economic Partnership Agreement**

The foregoing discussion indicates that preference erosion for traditional agricultural exports had started long before the EPA. However, the dismantling of the ACP sugar pricing regime was launched while the EPA was under negotiation. Public discussion of the EPA in the Caribbean before the agreement was signed tended to focus more heavily on these traditional sectors than on the effects of import competition, loss of government revenue or the market access potential for other Caribbean exports in European markets. CARIFORUM, unlike the other regions initialed a full EPA not just an IEPA on goods only in December 2007. The Caribbean Regional Negotiating Machinery argued that it enabled them to get a good deal on services. The decision to conclude an agreement in December 2007 rather than to continue negotiating into 2008 was based primarily on the prospect of the European Community imposing GSP tariffs on CARIFORUM exports as of January 1 2008, and the disruption that this would cause for various merchandise exports to Europe, and primarily for the agricultural exports like bananas and sugar.

The legal basis for the EPA negotiations is Article 36 of the CPA which states that the ACP and the EC would conclude by December 2007 WTO-compatible trade arrangements that would progressively reduce all barriers to trade between them. The CARIFORUM-EU talks began in April 2004 and were concluded in December 2007. The CARIFORUM-EU EPA was initialed in December 2007 but not signed. Two earlier signing ceremony dates, one in July and the other on September 2 2008, were postponed in the context of general controversy over the EPAs throughout the ACP, debates in some EU states and strong criticism of the CARIFORUM EPA from academics, civil society, private sector and other groups in the Caribbean. This prompted a number of CARIFORUM governments, namely Guyana, St. Lucia and Grenada to engage in domestic consultation and review processes. A special CARICOM Summit was held on September 10 2008 for governments to attempt to hammer out a common position. The European Commission had proposed that October 31 2008 should be the new target date for signing the EPA. CARIFORUM announced that they would sign the EPA on October 15 2008 in Barbados (David Jessop, Stabroek News, October 5, 2008). Prior to that date, the Government of Jamaica had indicated its intention to sign the EPA. On October 15 2008[14] the Government of Jamaica signed the EPA with all other CARICOM countries except Guyana and Haiti. Guyana signed later.

The EU has continued to be the largest provider of grant resources to Jamaica. (ESSJ, 2007). The Country Strategy Paper for the 10$^{th}$ European Development Fund (2008-2013) adopted by the EU in November 2007, produced an indicative allocation of

[13] This was as a result of an EU-US agreement to liberalize their trade in distilled spirits, the "Zero-for-Zero Agreement." See CARICOM 2005:87.
[14] Radiojamaica.com. http://www.radiojamaica.com/index.php?option=com_content&task=view&id=12441&Itemid=87

110.0 million euros to Jamaica. The priority areas are debt reduction, growth enhancement, governance and assistance to implement the EPA[15].

**Overall Trade Liberalization**

Under the terms of the EPA, 92% of all trade flows between the European Union and the CARIFORUM countries will be progressively liberalized over a period of 25 years (CRNM, December 2007). Specific information on the liberalization schedules is contained in Annexes Two, Three and Four to the Economic Partnership Agreement. The EU will grant Duty-free Quota Free status (DFQF) to most CARIFORUM exports which qualify for this under the Rules of Origin. CARIFORUM countries will collectively liberalize 87% of their trade with the EU. 83% of this volume will be liberalized over the next 15 years while the remaining 4% will be completed during the last ten years. There is also a moratorium of three years that began in 2008, for the removal of customs duties. During this time, CARIFORUM countries are expected to engage in fiscal restructuring to shift the burden of government revenues from trade taxes to other forms of taxes which are most likely to be indirect taxation.

There is a moratorium of ten years for liberalizing tariffs on the high-tariff items of motor vehicles, motor parts and gasoline. Other duties and charges such as environmental levies, stamp duties and customs user fees may remain for the first ten years, but the liberalization process must begin in Year Seven. The liberalization process is therefore **back-loaded** from the perspective of revenue collection, with the high tariff items being reserved for the final phase of liberalization. Approximately half (51%) of the items scheduled for immediate liberalization already attract zero duties, while 1.8% attract low tariffs (Gonsalves, 2008). Some 13% of CARIFORUM imports from the EU are excluded altogether from the liberalization schedule. Many items on the Excluded List are agricultural raw or processed products such as vegetables, meat, fish or certain dairy products. Manufactured products include paints, soaps, furniture and some types of apparel. The schedule for liberalization is more gradual in the case of CARICOM Less Developed Countries (the OECS countries and Belize). Their specific exclusions amount to 30% of their overall imports from the EU (Gonsalves, 2008, CRNM 2008).

**Table 1.1 CARIFORUM LIBERALIZATION SCHEDULE**

| 2008 | 2013 | 2018 | 2023 | 2033 |
|---|---|---|---|---|
| 52.8% | 56% | 61.1% | 82.7% | 86.9% |

*Source: Caribbean Regional Negotiating Machinery, December 2007.*

Two major agricultural exports, sugar and rice, were not accorded immediate Duty Free Quota Free (DFQF) treatment in the EC. EPA comes with a new regime for

[15] Seven Financing Agreements totalling JA$3.4 billion (36.5 million euros) provide support that could enhance the country's ability to adjust to the changes of the EPA. These include:

- Road Sector Support and Institutional Strengthening (J$1.1 billion);
- Poverty Reduction(J$938.7m) for initatives to support sustainable growth and community safety; Technical Cooperation Facility (J$130.1m) as capacity building for stakeholders to implement the Cooperation Programme; Institutional Strengthening of the National Authorizing Office in the Planning Institute of Jamaica (J$92.9 m); Rehabilitation of the Negril and Ocho Rios Wastewater Treatment Plants (J$278.8m); Sugar Accompanying Measures (J$483.3m) to support sustainable economic diversification and support social reliance in sugar dependent communities; and 2006 Special Framework of Assistance for the banana industry (J$325.3 m) to support sustainable development in traditional banana growing areas to support alternative economic activities to ensure continued international competitiveness of banana exports.

sugar which avoids the immediate complete cessation of exports as would have been the case outside the EPA but with effects that will become clear only over time. For the transitional period only (2009) CARIFORUM gained an additional 60,000 tons on its sugar quota of which 30,000 tons were allocated to the Dominican Republic and the other 30,000 tons to CARICOM producers. The CARIFORUM rice quota was immediately made duty free with the prospect of the quota being increased by 29% in 2008 and 72% in 2009. The banana industry retained DFQF access to the EC market which it would have lost had CARIFORUM not signed the EPA. The stated view of the CRNM (2007), was that the EPA would render null and void the effect of earlier WTO rulings against ACP preferences which would place this sector in a less legally embattled situation than it had been previously.

**Safeguard Clauses**

The EPA provisions include a Safeguard Mechanism which can be invoked if CARIFORUM countries experience severe domestic difficulties, due to a surge in imports affecting the entire economy or a specific sector. In such circumstances, they may apply to the EPA Trade and Development Committee and the time schedule for tariff reduction may be stalled but not beyond the maximum transitional period outlined. The provisions indicate a maximum suspension period of eight years. There is also a provision for triggering emergency safeguard procedures while the longer-term approval process is taking place. For the OECS, Belize and Guyana, there is the possibility of modifying tariff commitments for infant industries, as long as such modification is in accordance with Art. 24 of the GATT 1994.

Under Article 25 of the EPA, in the interests of food security and sustainable development, Safeguard Measures can be invoked for agricultural products if they encounter major difficulties with market liberalization. These measures can also be periodically extended for a maximum period of eight years. As noted above, certain agricultural products are on the list of products excluded from tariff elimination while some other agricultural and agro-processed products have longer phase-in periods.

It should be noted that the European Overseas Territories, including the French Departements d'Outre-mer (DOMs) are exempted from extending the DFQF liberalized access to CARIFORUM products. Likewise, they have access to the same type of Safeguard Mechanism as the CARIFORUM countries. While this is mandated under EU treaty obligations to its outermost and peripheral territories, and is also a *quid pro quo* for the CARIFORUM Safeguard Mechanism, *in effect it makes it less attractive to expand trade with EU Caribbean territories* that are the most accessible parts of the EU market for many CARIFORUM producers.

**Sanitary and Phytosanitary Measures (SPS)**

The EPA has clauses on cooperation in upgrading CARIFORUM countries' SPS capacities, harmonizing regulatory measures with those of the EU, and on sharing expertise on technical regulations and standards in the agricultural sector. Although there are no specific commitments on the amount of development support to be provided for this purpose or the timeframe in which it should take place, this is an area identified for potential development cooperation under the EPA.

**Liberalization of Investment and Service Sectors**

CARIFORUM countries made different levels of commitment on liberalizing their service sectors. The Dominican Republic committed itself to liberalizing 90% of the sector, Jamaica and the other CARICOM MDCs committed themselves to liberalizing 75% and the CARICOM LDCs to 65%.[16] The Bahamas and Haiti did not submit national schedules for liberalization and were given six months in which to do so. The EPA has a provision that *after five years*, the EU and CARIFORUM parties will hold *further negotiations on enhancing their service liberalization commitments*.

The agreement explicitly excludes state-supplied services and government procurement from the liberalization process. National immigration policies are in no way affected by the agreement and governments remain free to regulate the service sector. For investment, the areas of nuclear materials, arms production, audio-visual services, maritime and air transport services and air traffic services are explicitly excluded. *Each side extended to the other, national treatment and MFN market access for the manufacturing, mining, agricultural forestry and service sectors, with some reservations.* Some CARIFORUM states made reservations relating to investment in specific areas in agriculture, particularly aimed at limiting alien landholding or to protect Micro, Small and Medium Sized Enterprises. The EU also excluded some sectors and made restrictions for its newest member states which will not start liberalizing market access for services and investment until 2011 and 2014 in the cases of Romania and Bulgaria. There are provisions which spell out mutual obligations to protect the natural environment, to adhere to international labour, health and safety standards, and to eschew corruption. Finally, the EU and CARIFORUM committed themselves to a review of the legal frameworks governing investment and a review of Direct Foreign Investment (DFI) flows, three years after the start of the agreement (EPA Title II, chaps. 1 & 2; CRNM 2007; CRNM 2008).

Both parties committed themselves to similar national treatment and MFN status in *granting market access for the cross-border supply of services*. The same sectors are excluded as in the case of investment liberalization. Sectors covered include tourism, financial services, courier services, E-commerce, telecommunications, some aspects of maritime and air transport services, environmental services and business services.

The provisions for services that have attracted greatest interest in CARIFORUM states are those that relate to the *temporary presence of natural persons*. The EU is understood to have made commitments in this area, particularly with regard to entertainment services, that it has not previously made to other negotiating partners. CARIFORUM has made limited commitments in market access under Mode Four. The EU has committed itself to allow market access for CARIFORUM business managers and graduate trainees, independent professionals, short term visitors for business purposes, business services sellers and contractual service suppliers. Key business personnel, such as managers, if they are on intra-corporate transfers, may stay in the EU for a period of up to three years. Graduate trainees may stay for a period of up to one year while short term visitors for business purposes may stay up to ninety days in any twelve month period. Twenty-nine sectors have been liberalized for temporary entry for a period not exceeding twelve months by contractual service suppliers and independent professionals (EPA, Title II, Chapter Four, Article 83).

[16] These figures come from the CRNM EPA Information Kit 2008. However, it is not clear what the precise schedules of commitment for different countries are.

These include: *accounting services, architectural services, engineering services, certain types of legal services, medical, nursing and dental services, research and development services, advertising and marketing services, management consulting services, fashion model services, chef de cuisine services, translation and interpretation services, entertainment services, travel agency and tour guide services. Entertainment services include theatre productions and ancillary theatre services, singer groups, individual musicians, bands and orchestras, dance instructors, discotheque and ball room productions, authors, composers, sculptors and other artists as well as other entertainers.*

There are certain limitations to this market access. The audio-visual sector in the EU is completely excluded, although a Cultural Protocol was signed between the parties which encourages creative cooperation and the possible development of joint ventures in the area of audio-visual productions. The liberalization process in the twelve newest EU member states will not begin until 2011. In all cases, market access is *subject to the immigration regulations of the country concerned* and to limitations imposed by *domestic economic needs tests* and to the possession of a *contract* for the specified period. With the exception of persons offering fashion model services, chef de cuisine services and entertainment services, the service operators must be in possession of a *university degree* or its equivalent or requisite professional qualifications and a *specified number of years of work experience* (EPA, Title II, Chap. 4, Article 2). These limitation clauses are likely to pose formidable real restrictions on Mode Four access to EU markets by CARIFORUM service providers.

Finally, both the EU and CARIFORUM have committed themselves to facilitate the temporary stay of short-term visitors for up to ninety days in any twelve month period for business purposes from the other Party for the following activities: research and design, marketing research, training seminars, trade fairs and exhibitions, sales and purchasing, tourism conventions and exhibitions.

The EPA has provisions encouraging professional bodies in their countries and regions to start negotiations within three years after the EPA has entered into force on the mutual recognition of their respective certification in architecture, engineering, accounting and tourism. Progress on mutual recognition should be reviewed every two years by the Trade and Development Committee. There are also provisions requiring the parties to the EPA to establish appropriate information offices and arbitral tribunals to provide information to investors and service suppliers and also to impartially review administrative decisions deemed to have affected service suppliers (Title II, Chapter Five, Articles 86 and 87).

**Most Favoured Nation Clause**

For market access in goods, investment and the cross border supply of services, the EPA stipulates that CARIFORUM countries must accord to the European Union any more favourable treatment that they may grant in future trade liberalization agreements to any other major trading economy or group of economies. The former is defined as an economy that accounts for over 1% of world trade, while a major group is defined as one that accounts for approximately 2% of world trade.

**Development Cooperation**

Policy statements accompanying the launch of the ACP-EU EPA negotiations emphasized their development orientation and the commitment to poverty alleviation and sustainable development. The question of providing additional support, beyond already heavily committed European Development Fund allocations, for the new *costly national and regional regulatory structur*es that would be required for the implementation of the provisions, and for boosting the competitiveness of CARIFORUM economies, became a major issue and sticking point during the negotiations. It is worth noting that the final text, Part I, Articles 7 and 8 of the EU-CARIFORUM EPA, emphasizes *development cooperation* as an essential factor in realizing the Agreement's objectives, indicating that such cooperation can have financial and non-financial forms. It designates the cooperation priorities for the EPA as follows:-

- Technical assistance to build human, legal and institutional capacity in the CARIFORUM states to implement the Agreement;
- Assistance for capacity and institution-building for fiscal reform, strengthened tax administration to shift revenue dependence from tariffs and other duties;
- Support for the private sector especially for SMEs and for enhancing the competitiveness of CARIFORUM firms;
- Diversification of CARIFORUM exports;
- Capacity building for compliance with SPS, technical, labour and environmental quality standards;
- Development of CARIFORUM's scientific and technological capacity;
- Support for the development of trade-related infrastructure, including trade, defense and export marketing institutions.

Article 8 carefully "agrees on the benefits" of the CARIFORUM-proposed Regional Development Fund and supports the idea of channeling development resources from the EDF and other potential donors into such a fund. The CARIFORUM parties commit themselves to endeavour to establish such a fund within two years after the signing of the EPA.

In the final analysis, although the EPA makes oblique references to other potential resources like the WTO Aid for Trade programme, the concrete resources which can be counted on for implementing the commitments will mainly come from the $10^{th}$ European Development Fund. It contains approximately 165 million Euros for CARIFORUM states of which 33 million Euros is directly tagged EPA support. An additional 132 million Euros is provided for CARIFORUM regional programmes and 85% of the latter is designated for supporting regional integration and EPA capacity-building. Some CARIFORUM countries, notably Jamaica and the Dominican Republic, have indicated that they will allocate most of their national allocations under EDF 10 for EPA implementation. This may well have implications for other aspects of countries' development programmes if it entails the re-allocation of funds normally used for social support programmes.

One EPA critic observes that the Agreement "is replete with laudable references to development cooperation in different sectors" (Girvan, 2008). However, significantly, most of these commitments are couched in non-binding "Best Endeavour" type language. The strongest and clearest commitments to development support in the EPA feature in the provisions on reforming the tax structures and administrations in the CARIFORUM states away from dependence on trade taxes, and in the provisions on overhauling, expanding and upgrading the technological and human capacities of the CARIFORUM customs administrations.

**Institutional Arrangements**

Article Five of the EPA contains a commitment by the Parties to continuously monitor the implementation and the operations of the Agreement and to consult on problems that may arise. To this end, in Part V, the EPA contains a number of institutional provisions. There will be a Joint CARIFORUM-EC Council to supervise implementation and to monitor the fulfillment of objectives. The Council will meet at ministerial level every two years or more frequently if required. It also has a mandate to examine proposals to review the Agreement. It will consist of governmental representatives from each country and of representatives of the European Commission. CARIFORUM, for matters on which they have agreed to act collectively, will designate a representative to act on their collective behalf. The Council has decision-making powers and its decisions will be binding.

The Council will be assisted by a CARIFORUM-EC Trade and Development Committee. This will be composed of senior officials who will supervise and be responsible for the implementation and application of the provisions in the area of trade, dispute resolution and development cooperation. This Committee may set up and oversee Special Committees on various issues. The Trade and Development Committee will meet generally once a year. It is of note that one special committee already designated in the EPA text is the Special Committee on Customs and Trade Facilitation (article 36) set up to monitor the implementation of the provisions on customs administration strengthening and trade facilitation.

The EPA will also have a **CARIFORUM-EC Parliamentary Committee** which will be a Forum for members of the legislatures to meet and exchange views on matters contained in the Agreement. Finally, there will be a **CARIFORUM-EC Consultative Committee** which will assist the **Joint Council** to promote dialogue and cooperation with civil society representatives including academics and socio-economic partners. The scope of the dialogue it states will encompass all economic, social and environmental aspects relating to the implementation of the EPA. *The composition of the Committee will be decided by the Joint Council.* The Committee may make recommendations to the Council and to the Trade and Development Committee.

Part III of the EPA has extensive provisions on Dispute Avoidance and Settlement. It outlines the procedures in the first instance for consultations with the Trade and Development Committee, followed if necessary by mediation proceedings. Dispute Settlement procedures it states should be conducted by means of the establishment of arbitration panels. Parties are expected to comply with the ruling of the respective panel within a given period. Various temporary remedies are set out in the event of non-compliance. Notably, they include compensation payments but do not include the suspension of trade concessions in the Agreement (Article 213).

**Caribbean Responses to the EPA**

There have been positive as well as negative responses to the EPA across the region. The section bellows summarizes the diversity of views:

*EPA Supporters:*
Supporters indicate that the Agreement will promote regional integration, by encouraging the region's small economies to come together to take advantage of emerging opportunities. The expectation has also been that the process will help to modernize Caribbean economies and make them more globally competitive.

*EPA Detractors/Opponents:*
Detractors and opponents highlight the following concerns associated with trade liberalization:

- Unequal levels of size and development between European and developing countries.
- Different technical capacities to negotiate in global trade talks, and trade negotiations;
- Different levels of private sector competitiveness;
- Collapse of global trade talks, amidst widespread protests in many developing countries, academics and development activists;
- EU refusal to agree to terms that erode basic human rights, threaten livelihoods and sustainable development and are likely to increase poverty and inequality;
- Inadequate opportunities for civil society participation in trade negotiations;
- Trade being prioritized over development in the EPA which is likely to negatively impact the MDGs;
- Global recession, massive job losses, increased oil prices and inflation and the negative impact of climate change, which has resulted in costly hurricanes etc.;
- EU time pressure used in the negotiations with the result that most CARIFORUM countries initialed the EPA before the December 31 2007 deadline to avoid the imposition of tariffs on their exports and signed on October 15 2008.

Academics, development agencies, other civil society groups, small business associations and consumer associations and trade unions have also voiced the following concerns:-

1. The fiscal implications of the EPA will undoubtedly result in considerable loss of trade tax revenue for CARIFORUM governments over the next ten years. These taxes will have to be replaced, presumably by shifting the tax burden to domestic actors and raising the cost of living and the cost of domestic services considerably. They also question CARIFORUM governments' capacity to either maintain the standard of current social services or to implement the slew of new regulatory institutions that are needed to put the EPA into effect.
2. There were concerns about the implications of the MFN clause for inhibiting trade with influential emerging economies like Brazil, China and India.
3. It was felt that the EPA sets a precedent that will influence future trade liberalization agreements with Canada and other major countries.
4. Many questions were raised about the overall quantum of development assistance that accompanies the EPA and the inadequacy of assistance for the major tasks of institution building that is mandated by the EPA. The opportunities for structural transformation are highly dependent on funding. There have likewise been historical delays associated with EU development funding.

5. The EPA will probably have adverse consequences for the CSME and for regional integration in general. It encourages bilateral links between the EU and individual CARIFORUM actors. Given the lack of institutionalization of CARIFORUM, the EU institutions have even greater weight in all dispute settlement and decision-making than they would otherwise have done. CARICOM institutions have little voice since they cannot claim to represent all the CARIFORUM countries.
6. Question marks have surrounded the new governance arrangements and their representativeness. For example, will civil society, social and economic development actors have an adequate voice in these arrangements and will they be enabled to effectively monitor the workings of the EPA? Civil society actors published an Open Petition calling on the governments not to sign anything that goes beyond their commitments in the WTO. They have criticized the potential harmful socio-economic effects of the EPA on lower income and marginalized sectors in Caribbean societies. They called for renegotiation to strengthen its development clauses and they also called for a continuous monitoring mechanism and a review/renegotiation of crucial aspects after three years.
7. Trade remedy provisions and dispute settlement arrangements, likewise market access under Mode Four to service markets in Europe will be very difficult for small Caribbean firms to access.
8. In early October, concern was expressed by Caribbean private sector representatives that there was no clear CARIFORUM centre for coordinating EPA implementation and for coordinating the developmental aspects of the agreement. Concern was also expressed that failure to provide strong regional leadership and to set up such mechanisms will result in the dire predictions becoming self-fulfilling (David Jessop, "The View from Europe", Stabroek News 5/10/2008).
9. Despite the efforts of the Caribbean Regional Negotiating Machinery, national governments and the European Commission to organize information campaigns and consultation processes about the EPA during its negotiation, it was evident that the process was highly uneven and that many sectors of the society who would be deeply affected by the EPA remained unaware of its contents or implications for their livelihoods and economic interests. This was particularly the case for small and micro-enterprises, for civil society groups and the public at large.

When the EPA was initialed in December 2007, this milestone was accompanied by a variety of responses across the CARIFORUM region. On the one hand, the agreement was hailed by the European Commission and by the Caribbean Regional Negotiating Machinery (CRNM) as a historic advance for Caribbean trade negotiations and for the economic relationship with Europe, as well as an opportunity to transform the structures and competitiveness of the region's economies. On the other hand there was a rising tide of criticism of major aspects of the EPA, as well as uncertainty. Guyana, Grenada and St. Lucia announced that they would reopen national consultations and a review of the EPA. Despite some internal discussions, the EPA was endorsed by the governments of the Dominican Republic, Belize, Barbados, Jamaica and Trinidad. In September 2008, Haiti had indicated to the European Commission that it was not ready to sign. The President of Guyana in a letter to the President of the European Commission of 30th September 2008, had also indicated Guyana's interest in signing a

"Goods Only" agreement and renegotiating further provisions on services and other matters at a later stage (Sanders, October 3, 2008, www.huntingtonnews.net; "Letter from Jagdeo to Barroso, 30/9/08, www.normangirvan.info). The other CARIFORUM countries set the date of October 15 2008 for the signing ceremony in Barbados (D. Jessop, "The View from Europe", Stabroek News 5/10/2008). Consistent with that decision, all CARIFORUM countries except Haiti and Guyana signed the EPA on October 15 2008.

### *1.2.4 Implications of the EPA for Jamaica's Commitments to Women's Human Rights, Gender Equality, Empowerment of Women*

Article 11 of CEDAW addresses women's right to equality in employment but this could be undermined by the type of job available, the wages and working conditions. EPA investments would need to support Article 11 of CEDAW, MDG 3 and ILO's Decent Work Agenda. Previous experiences of foreign investments in Jamaica's Free Trade Zones in the 1990s showed that women's employment in textiles and apparels increased jobs for women (peaked at 36,000) but wages were very low (piece rates), working conditions were oppressive(long working hours, harassment, heat, dust etc), resulting in frequent industrial action. The jobs were also unstable and with the NAFTA, over 16,000 jobs were lost as companies relocated to Central America, some left without paying the workers. FTA workers were denied access to trade unions in contravention ILO Conventions as non-unionization was part of the package of incentives for investors.[17] The low wages meant earnings barely above minimum wage (risk of poverty). To ensure policy coherence,[18] with human rights commitments, monitoring mechanisms in the Ministry of Labour will need to be strengthened. EPA-related investment would need to support poverty reduction (MDG#1) and help to eliminate gender stereotyping in occupations.

**ILO Conventions**

The EPA includes obligations to adhere to core international labour standards such as freedom of association and the right to collective bargaining, the abolition of forced labour, the elimination of the worst forms of child labour and non-discrimination in respect to employment. There is also a commitment to fulfill obligations under the ILO *Declaration on Fundamental Principles and Rights at Work* and its Follow-up (1998); the UN Social and Economic Council on Full Employment and the **Decent Work Agenda**. The *Decent Work Agenda* commits states parties to: maintain high labour standards and fundamental principles and rights at work; increase employment opportunities; provide social protection; promote social dialogue. Provisions have been made for monitoring and consultation on the implementation of labour obligations, and to strengthen labour legislation, enforcement mechanisms, training and capacity building. [19] Jamaica has ratified core ILO conventions that protect the rights of workers, promote equality and eliminate child labour and the worst forms of child labour (Conventions 138 and 182). Already there are gaps between commitments and practice. To support the development goals of the EPA, the Ministry of Labour will need to expand and train the core of Labour Inspectors.

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[17] Dunn, L (1991). Women Organising for Change in Caribbean Free Zones: Strategies and Methods,' ISS Working Paper No.14, October 1991.

[18] See Dunn, L and Mondesire, A, (2002). Poverty and Policy Coherence: The Case of Jamaica. http://www.nsi-ins.ca/english/pdf/jamaica2.pdf

[19] Summary of the EPA prepared by Jamaica's Ministry of Foreign Affairs and Foreign Trade (March 5, 2008).

**Chapter Summary**

This chapter outlined the history and context of the EU-CARIFORUM EPA, marked for the first time by reciprocal trade between the EU and ACP countries. It examined:

- Links between globalization, gender trade and development;
- The gender analytical framework guiding the study developed by Fontana (2007/08);
- The history of Jamaica's trade with the EU since the 1990s and implications of GATS and the CSME.
- The debates from diverse stakeholders in the Caribbean over the EPA presented for and against its implementation, hence the need for open dialogue and communications to assess and plan for the implications.

The chapter concludes with a reminder of the need to consider human rights commitments linked to poverty reduction, gender equality and the empowerment of women (CEDAW, MDGs, ILO Conventions) in implementing the EPA.

# 2. Jamaica: Demographic and Economic profile

## 2.1. Demographic Profile and the Labour Market

### *2.1.1 Demographic Profile*

Jamaica is the third largest country in the English-speaking Caribbean in terms of its territorial expanse with an area of 10,991 $km^2$ and a population of approximately 2.7 million people. The population growth rate has remained constant over the last five years at 0.5% (ESSJ 2007). The sex distribution is equitable with almost equal numbers of males (49%) and females (51%), resulting in a sex ratio of 97 males to 100 females. There are however more females than males in the working age and elderly population groups which implies that women in the working age population will continue to have the major responsibility for the care of young children and the elderly because of their ascribed gender roles as caregivers. Women's life expectancy is higher than that of men (76 years and 73 years respectively). The working age population (15-65 years) was 1,699,300 and comprised 64.4 per cent of the total population. This age cohort included 865,300 females (51%) and 834,000 (49%) males.

### *2.1.2 Labour Force[20] by Gender*

Table 2.1 provides an overview of the Annual Average of the Labour Force in 2007. The Total Labour Force was 1.3 million: 562,200 females (45%) and 699,100 males (55%). The Employed Labour Force was 1.14 million: 480,800 females (42%) and 656,100 males (58%). The Labour Force Participation rate for females was 57% and for males 74%.

[20] Persons aged 14 years and over employed in any form of economic activity, persons looking for work or wanting and willing to accept work during the survey reference week.

**Table 2.1 MAIN LABOUR FORCE INDICATORS BY GENDER, 2007('000)**

| MAIN INDICATORS | 2007p Annual Average* | | | |
|---|---|---|---|---|
| | Male | Female | % Females | Both Sexes |
| Labour Force | 699.1 | 562.2 | 45 | 1,261.30 |
| Employed Labour Force | 656.1 | 480.8 | 42 | 1,136.90 |
| Unemployed Labour Force | 43.1 | 81.4 | 65 | 124.5 |
| Unemployment Rate (%) | 6.2 | 14.5 | - | 9.9 |
| Job-Seeking Rate (%) | 4.1 | 8.3 | - | 5.9 |
| Labour Force Participation Rate | 73.6 | 56.5 | - | 64.8 |

Note: Discrepancies due to rounding.
p – preliminary
*The annual average is calculated from quarterly data.
*Source: Statistical Institute of Jamaica. Taken from Economic and Social Survey Jamaica, 2007.*

The Unemployed Labour Force totaled 124,500 persons, 65% of whom were females and 34% were males. The Unemployment Rate for females was 15% and for males it was 6%, showing that females have more than twice the rate of unemployment as males. The lower Labour Force Participation Rate and the higher rate of females in the Unemployed Labour Force reflect women's higher level of involvement in the unpaid care economy. They have to combine productive, reproductive and community management roles. The higher time burden because of their role in the care economy of the family influences their level of participation in the paid labour force and the sectors in which they work. Women tend to be concentrated in jobs that provide flexibility to combine their triple roles. The data also showed that women have a higher Job Seeking Rate (8%) compared to men (4%). This may reflect the large number of single female headed households (46%) which rely on women as the main source of income for their family hence their interest in seeking jobs.

### *2.1.3 Labour Force[21] by Age and Gender*

Table 2.2 shows for youth (14-24 years) and adults (25 years and over) there were fewer females than males in the Labour Force for all age groups among youth and adult cohorts.

**Table 2.2 LABOUR FORCE BY AGE GROUP AND GENDER, 2007 ('000)**

| AGE | 2007p Annual Average* | | |
|---|---|---|---|
| | Male | Female | Total |
| **TOTAL** | **695.3** | **560.7** | **1256.0** |
| 14-19 | 24.9 | 17.9 | 42.8 |
| 20-24 | 94.5 | 80.0 | 174.5 |
| 25-34 | 180.4 | 161.1 | 341.5 |
| 35-44 | 171.2 | 151.8 | 323.0 |
| 45-54 | 116.6 | 90.7 | 207.3 |
| 55-64 | 66.6 | 40.1 | 106.7 |
| 65 and over | 41.1 | 19.1 | 60.2 |

Note: Discrepancies due to rounding

[21] See Footnote 22.

p – preliminary *The annual average is calculated from quarterly data.
*Source: Statistical Institute of Jamaica. Taken from Economic and Social Survey Jamaica, 2007.*

### *2.1.4 Employed Labour Force by Age and Gender*

Table 2.3 shows that gender inequalities also exist in the Employed Labour Force by age and gender. More males than females were employed in all age groups.

The development element of the EPA should therefore promote greater gender equality in the labour market. The EPA should increase employment opportunities for young females to reverse this trend (See Appendix B.1).

**Table 2.3 EMPLOYED LABOUR FORCE BY AGE GROUP AND GENDER, 2007 ('000)**

| GENDER AND AGE | 2007$^p$ Annual Average* | |
|---|---|---|
| | **Male** | **Female** |
| TOTAL | 656.1 | 480.8 |
| Youth (14-24 yrs.) | 100.4 | 65.7 |
| Adults (25 yrs. And over) | 555.7 | 415.2 |
| *25-34 yrs.* | *169.8* | *135.6* |
| *35-44 yrs.* | *165.8* | *135.1* |
| *45 yrs. and over* | *220* | *144.5* |

Note: Discrepancies due to rounding.
p – preliminary
*The annual average is calculated from quarterly data.
*Source: Statistical Institute of Jamaica. Taken from Economic and Social Survey Jamaica, 2007.*

### *2.1.5 Employed Labour Force by Employment Status and Gender*

Almost half (50%) of the employed labour force worked as 'Paid Non-Government Employees' while another 33% reported that they were 'Own Account Workers' (See Table 2.4). This implies that approximately one-third of these persons are entrepreneurs.

Table 2.4 shows that 59% of government employees are female and are therefore likely to be adversely affected if there are cuts in government revenue. The largest grouping of women is "Paid Non-government Employee",[22] who account for 42% of workers. Approximately 74% of unpaid workers are women, which makes them vulnerable to poverty.

**Table 2.4 EMPLOYED LABOUR FORCE BY EMPLOYMENT STATUS , 2007 ('000)**

| EMPLOYMENT STATUS | 2007$^p$ Annual Average* | | | |
|---|---|---|---|---|
| | **Male** | **Female** | **% Female** | **Both Sexes** |
| Paid Government Employee | 56.4 | 82.7 | 59 | 139.2 |
| Paid Non-Government Employee | 329.5 | 244.6 | 42 | 574 |
| Unpaid Worker | 3.7 | 10.6 | 74 | 14.3 |
| Employer | 21.8 | 9.2 | 29 | 31 |

[22] This includes the private sector.

| | | | | |
|---|---|---|---|---|
| Own Account Worker | 243.5 | 132.4 | 35 | 375.8 |
| Not Reported | 1.3 | 1.4 | 51 | 2.7 |
| Total | **656.1** | **480.8** | **42** | **1,136.90** |

Note: Discrepancies due to rounding.
p – preliminary
*Source: Statistical Institute of Jamaica. Taken from Economic and Social Survey Jamaica, 2007*
*The annual average is calculated from quarterly data.

Only 29% of women are employers and another 35% are own account workers. Just over half (51%) of the employed labour force did not report their employment status. This table clearly demonstrates women's unequal position in the employed labour force particularly as unpaid workers and employers.

In terms of male employment, 37% of males were entrepreneurs as compared to 28% of females. Among persons employed as 'Paid Non-Government Employees' there was greater gender equality (49% of males and 51% of females).

### *2.1.6 Employment by Occupation Group*

Table 2.5 shows that in 2007, although women were half the total population, they represented only 42% of all occupational groups. In rank order, the occupational groups dominated by women were: Clerks (75%); Service Workers, Shop & Market Sales Workers (62%); Professionals, Senior Official and Technicians' (59%); Elementary Occupations (51%); 'Skilled Agricultural & Fishery Workers' (17%); and Craft workers (10%). This confirms that the majority of women are in occupations that are low status jobs. They are therefore vulnerable to job losses if there are changes in the labour market.

**Table 2.5 EMPLOYED LABOUR FORCE BY OCCUPATION GROUP, 2007 ('000)**

| **OCCUPATION GROUP** | **2007$^{p}$ Annual Average*** | | | |
|---|---|---|---|---|
| **BOTH SEXES** | **Male** | **Female** | **% Females** | **Both Sexes** |
| Professionals, Senior Officials & Technicians | 88.9 | 128 | 59 | 216.9 |
| Clerks | 24.2 | 76.2 | 75 | 100.4 |
| Service Workers, Shop & Market Sales Workers | 78.1 | 129.2 | 62 | 207.3 |
| Skilled Agricultural & Fishery Workers | 161.8 | 35.4 | 17 | 197.2 |
| Craft & Related Trades Workers | 156.8 | 18.5 | 10 | 175.3 |
| Plant & Ma chine Operators & Assemblers | 63.9 | 4.9 | 7 | 68.7 |
| Elementary Occupations | 81.7 | 88.4 | 51 | 170.1 |
| Occupation not specified | 0.8 | 0.4 | 36 | 1.1 |
| Total | **656.1** | **480.8** | **42** | **1,136.90** |

p – preliminary
*The annual average employment is calculated from quarterly data.

Note: Discrepancies due to rounding.
*Source: Statistical Institute of Jamaica in Economic and Social Survey Jamaica, 2007.*

The data also show that women are more likely than men to be in the category of *Professionals* and more of them may be eligible for employment under the category of skilled professionals (Mode 4). They may also have to compete with professionals from the EU and are therefore vulnerable to competition.

There was a higher concentration of males in the following occupations: 'Skilled Agricultural & Fishery Workers' (81%), 'Craft & Related Trades Workers' (90%) and 'Plant & Machine Operators & Assemblers' (93%). These are gender-sensitive because a change in trade could impact these workers.

Increased market access for sub-categories of agriculture and non-traditional goods, may provide male workers with more benefits than females. Plant and machine operators working for goods producing sectors are likely to benefit from increased opportunities for export. If their sub-sector is negatively impacted by imports, employment in the sub-sector will decline. In general, therefore, the EPA is likely to have a differential gender impact on persons employed in these two main sectors: males are more likely to benefit from the goods producing sector and females may benefit from the services sector.

**Table 2.6 OUTPUT OF SKILLED AND SEMI-SKILLED WORKERS BY OCCUPATION AND SEX, 2007**

| OCCUPATION | 2007 | | | |
|---|---|---|---|---|
| | Male | Female | % Female | TOTAL |
| 1. Agricultural Personnel | 246 | 245 | 49 | 491 |
| 2. Cooks, Waiters & Other Hotel Personnel | 2,899 | 8,282 | 74 | 11,181 |
| 3. Craftsmen, Production Process and Operating Personnel | 9,028 | 2,244 | 19 | 11,272 |
| 4. Police | 100 | 0 | - | 100 |
| 5. Secretarial and Other Commercial Personnel | 723 | 2,371 | 76 | 3,094 |
| 6. Cosmetology | 42 | 1,206 | 96 | 1,248 |
| 7. Computing | 3,070 | 4,559 | 59 | 7,629 |
| 8. Miscellaneous | 5,791 | 8,961 | 60 | 14,752 |
| TO TAL | 21,899 | 27,868 | 55 | 49,767 |

a - Includes training in Early Childhood Care, Practical Nursing, Assessors Training and other customized programmes.

N.B. Incomplete data series received for 2007.
Source: Compiled from data supplied by Community Colleges, Police Academy, Secretarial Colleges.

In terms of output of skilled and semi-skilled workers from Community Colleges, Table 2.6 shows that more women than men are involved in most categories of semi-skilled workers and females are heavily represented in the category of cooks, waiters and hotel personnel as well as miscellaneous workers. These may include: household and non-profit; community and personal services which are female-dominated categories. The data also confirm the larger numbers of women involved in miscellaneous occupations. The data for police should include women as there is a 7:1 ratio in favour of males.

### *2.1.7 Full Time and Part Time Employment*

Table 2.7 shows that of the total 1,137 hours worked during the survey week, 84% was Full Time employment and 16% was Part Time employment. Despite the absence of sex disaggregated data, it is assumed that the majority of part-time workers are women who are engaged in employment that enables them to combine reproductive and productive work. Among persons in full time employment, 53% worked 33 to 40 hours and 47% worked more than 40 hours.

**Table 2.7 FULL-TIME AND PART-TIME EMPLOYMENT DURING SURVEY WEEK, 2007 ('000)**

| HOURS WORKED DURING SURVEY WEEK | 2007p Annual Average* |
|---|---|
| ***PART TIME*** | ***178.5*** |
| 24 Hours or less | 109.8 |
| 25 to 32 Hours | 68.7 |
| ***FULL TIME*** | ***958.4*** |
| 33 to 40 Hours | 505.5 |
| More than 40 Hours | 452.9 |
| TOTAL | 1136.9 |

Note: i) Discrepancies due to rounding. ii) Public holidays coincided with the reference week in Jan 2007.
p – preliminary
*The annual average is calculated from quarterly data.
*Source: Statistical Institute of Jamaica in Economic and Social Survey Jamaica, 2007.*

## *2.1.8 Minimum Wage*

The National Minimum Wage Act 1975 was developed to protect non-unionized workers which included persons in garment manufacturing, retail, petrol, dry goods, hotels and security. In 2007, the minimum wage was J$3,200 for a 40-hour work week equivalent to $80 per hour. The minimum wage for Industrial Security Guards was $4,700 per week or $117.50 per hour (ESSJ 2007: 21:10). Statistical sex disaggregated data on the persons receiving the minimum wage were not available but we note that four of the six sectors identified above are female dominated and pay low wages. Domestic workers also earn minimum wage and the majority are female according to the Jamaica Household Workers Association. In 2009, discussions between the Ministry of Labour and stakeholders continued on the need to increase the minimum wage.

## *2.1.9 Salaries by Gender*

Table 2.8 shows that there is an inverse correlation between wages and sex: females are more likely to receive low wages and males are more likely to receive higher wages.

**Table 2.8 SALARY DISTRIBUTION BY SEX IN PRIVATE SECTOR ORGANISATIONS**

| SALARIES (J$) | Female (%) | Male (%) |
|---|---|---|
| <150,000 | 80 | 20 |
| 150,000 - 250,000 | 72 | 28 |
| 251,000 - 350,000 | 52 | 48 |
| 351,000 - 450,000 | 33 | 67 |
| 451,000 - 550,000 | 32 | 68 |
| 551,000 - 750,000 | 52 | 48 |
| 751,000 - 1,000,000 | 33 | 67 |
| 1,001,000 - 1,500,000 | 21 | 79 |
| 1,501,000 - 2,000,000 | 12 | 88 |
| > 2,000,000 | - | 100 |

***Source**: Survey conducted by Jamaica Employers' Federation in collaboration with the Centre for Gender & Development Studies.*

### *2.1.10 Summary of the Labour Market*

In summary, the data highlight the pre-existing gender inequalities in the labour market that are likely to result in the EPA having a differential impact on women and men as groups.

- Males dominate in all the Goods Producing Sectors (agriculture, mining, manufacturing and construction).

- However in the services sector, while females dominate overall, males dominate in transport and utilities (electricity, gas and water). To the extent that the EPA impacts on trade related to these industries, there will be a differential impact on men and women as groups.

- The profile of women shows: women's lower labour force participation rates; higher rates of unemployment; clustering in occupations low-wage occupations and sectors that make them vulnerable to changes in the economy generally, and specifically in response to the EPA.

- With many agricultural and manufactured products excluded from tariff liberalization, the sectors in which males dominate are for the most part protected from imports.

- Females dominate the services sector where wages and working conditions are poorer. These inequalities will result in the EPA having a differential impact on both sexes as groups. The time burden associated with women's reproductive gender roles also means that more women than men will be in part-time work and will therefore earn less.

## 2.2. Overview of the Macro-Economy

An overview of Jamaica's Macro-Economy, provides the framework for examining the likely gender impact of the EPA.

### *2.2.1 Contribution of Sectors to GDP and Employment*

Jamaica's official statistics report that GDP (at constant 1996 prices) was valued at approximately $250 million (See Appendix C.1). Table 2.9 presents data on the contribution of the Goods and Services sectors to Gross Domestic Product (GDP) and employment of males and females. The Services Sector contributed more than 70% to GDP and employs the majority of the employed female labour force (86%). The World Bank (2006) reports the following contributions to GDS: Agric.5%; Industry 29%; Services 66% and 86%. (see website).

**Table 2.9 CONTRIBUTION (%) TO GDP IN PRODUCERS' VALUES AT CONSTANT (1996) PRICES: SHOWING SHARE OF WORKERS IN EMPLOYED LABOUR FORCE BY GENDER - 2007**

| | 2007 | | | |
|---|---|---|---|---|
| **IN DUSTRIAL SECTOR** | **Contribution to GDP (%)** | **Share of Male Workers in Employed Male Labour Force (%)** | **Share of Female Workers in Employed Female Labour Force (%)** | **Share of Female Workers in Total Employed Labour Force (%)** |
| **GOODS** | **34.2** | **51.2** | **13.8** | **16** |
| Agriculture, Forestry & Fishing | 5.3 | 25.3 | 8.5 | 20 |
| Mining & Quarrying | 5.5 | 1.1 | 0.2 | 12 |
| Manufacturing | 12.6 | 7.7 | 4.0 | 28 |
| Construction & Installation | 10.7 | 17.2 | 1.1 | 4 |
| **SERVICES** | **72.9** | **48.6** | **86.0** | **56** |
| Electricity & Water | 4.1 | 0.9 | 0.3 | 22 |
| Transport, Storage & Communication | 14.2 | 9.6 | 3.2 | 20 |
| Financing & Insurance Services | 8.3 | | | |
| Real Estate & Business Ser vices | 5.3 | 5 | 7.1 | 51 |
| Producers of Government Services | 9.5 | * | * | * |
| Hotels, Restaurants & Clubs[a] | 7.2 | | | |
| Distributive Trade [a] | 21.9 | 14.9 | 34.1 | 63 |
| Miscellaneous Services [b] (incl. House hold & Non-Profit Institutions) | 2.4 | 18.2 | 41.2 | 62 |
| LESS Imputed Bank Service Charge | 7 | - | - | - |
| INDUSTRY NOT SPECIFIED | - | 0.2 | 0.2 | 50 |
| TOTAL GDP AT CONSTANT PRICES | 100 | 100 | 100.0 | 42 |

**Discrepancies due to rounding.**
Source: Statistical Institute of Jamaica. *Taken from Economic and Social Survey Jamaica, 2007.*
*** Available data for labour, does not provide a breakdown of services, in terms of producers of government services versus producers of private services.**
[a] Relates to the category of Whole sale & Ret ail Trades, Hotels & Rest au rant Services for labour.
[b] For labour, the category of 'Community, Social & Personal Services' has been included.

The Goods Producing Sector accounted for 34% of GDP with males representing 86% of the sector's workforce. This examination of the GDP and employment contribution of sectors by gender provides a framework for analyzing how men and women are likely to be affected by changes in sectoral trade which are discussed later in this report. In general the data show gender stereotyping in certain occupations and sectors with males heavily represented in the Goods Producing Sector and females in the Services Sector. Additional breakdown of the contribution of sectors to GDP is presented in Section 2.3.

### *2.2.2 Balance of Payments and External Trade*

Jamaica's Balance of Payments reflects a trade deficit of US$2,840.1 million. Table 2.10 shows that the Current Account registered a deficit of US$1,541.5 million in 2007. Imports of goods (US$4,737 million) far exceeded exports (US$1,897 million). To support development, one of the concrete goals of the EPA should be providing assistance to reduce the deficit.

**Table 2.10 BALANCE OF PAYMENTS, 2007 (US$ Million)**

| | **2007[p] (Jan-Oct)** |
|---|---|
| 1. CURRENT ACCOUNT BALANCE | -1,541.50 |
| A. Goods Balance | -2,840.10 |
| Exports (f.o.b) | 1,897.00 |
| Imports (f.o.b.) | 4,737.00 |
| B. Services Balance | 363.8 |
| Transportation | -442.5 |
| Travel | 1,257.50 |
| Other Ser vices | -451.3 |
| *Balance on Goods & Services* | *-2,476.30* |
| C. In come | -675.2 |
| Compensation of Employees | 63 |
| Investment income | -738.2 |
| D. Current Transfers | 1,610.00 |
| Official | 119.7 |
| Private | 1,490.30 |
| 2. CAPITAL & FINANCIAL ACCOUNT | 1,541.50 |
| A. Capital Account | -5 |
| Capital Transfers | -5 |
| B. Financial Account | 1,546.50 |
| Other Official Investment | 578.2 |
| Private Investment | 575.2 |
| Reserves [a] | 393 |

p – preliminary
*Source: Bank of Jamaica. Taken from Economic and Social Survey Jamaica, 2007.*
Note: Imports and exports are as reported by Bank of Jamaica. It is equivalent to the Statistical Institute of Jamaica's General Merchandise Exports and Imports excluding insurance and freight charges plus Free Zone exports and purchases by foreign carriers in Jamaica.
a – According to Balance of Payments Con vent ion minus reserves means an increase in reserves and vice versa.

The Services Balance totaled US$363.8 million *(Table 2.10).* Only Travel (US$1,257.5 million) recorded a positive figure. The Income Balance registered a deficit of US$ 675.2 million. The Capital and Financial Account on the other hand, recorded a surplus of US$1,541.5 million with Net International Reserves totaling US$393 million. The EPA should also boost trade in Services to reduce this deficit.

Table 2.11 provides a more detailed analysis of the Goods Sector and highlights the overall merchandise trade deficit of US$3,525.5 million in 2007. 'Crude Materials' accounted for over 60% of exports, while 'Mineral Fuels' and 'Machinery & Transport Equipment' represented approximately 50% of imports. Unfortunately, data on the proportion of women and men in the total labour force employed in food, beverages and tobacco, crude materials) were not available. This would have provided more concrete evidence of the female intensity in each of these sub-categories in the Goods Sector and hence the likely differential impact of the EPA on males and females. The earlier analysis however suggests that employment in most of these goods producing sub-sectors is male dominated and as such males are more likely to benefit.

**Table 2.11 MERCHANDISE TRADE BY SITC SECTION, JAN - OCT 2007 (US$ 000)**

| | 2007$^{p}$ | | |
|---|---|---|---|
| | **Imports** | **Exports** | **Balance** |
| **TOTAL** | **5,296.00** | **1,770.50** | **-3,525.50** |
| Food | 596.6 | 221.4 | -375.2 |
| Beverages and Tobacco | 77.1 | 82.5 | 5.4 |
| Crude Materials | 57.4 | 1,104.80 | 1,047.40 |
| Mineral Fuels | 1,586.80 | 262 | -1,324.80 |
| Animal and Vegetable Oils | 30.1 | 0 | -30.1 |
| Chemicals | 708.5 | 44.2 | -664.3 |
| Manufactured Goods | 631 | 15.8 | -615.2 |
| Machinery and Transport Equipment | 1,056.40 | 26.9 | -1,029.50 |
| Misc. Manufactured Articles | 481.3 | 13 | -468.3 |
| Other | 70.7 | 0 | -70.7 |

p – preliminary
*Source: Statistical Institute of Jamaica. Taken from Economic and Social Survey Jamaica, 2007.*

Table 2.12 shows that in 2007, revenue from Traditional Exports was recorded at US$1,209.9 million, with 'Mining' accounting for over 85% of this figure. Non-Traditional Exports earned US$519.7 million with the category of 'Other' representing approximately 62% of this figure. In total, revenue from Domestic Exports was valued at US$1,729.6 million.

**Table 2.12 TRADITIONAL AND NON - TRADITIONAL EXPORTS, 2007 (US$ '000)**

| | **2007$^{p}$ Jan-Oct.** |
|---|---|
| TRADITIONAL EXPORTS | 1,209,932 |
| **Agriculture:** | **36,717** |
| Banana | 9,222 |
| Citrus | 1,471 |
| Coffee | 22,376 |
| Cocoa | 1,889 |
| Pimento | 1,759 |
| **Mining:** | **1,031,087** |

| | |
|---|---|
| Bauxite | 95,503 |
| Alumina | 934,672 |
| Gypsum | 913 |
| **Manufacture:** | **142,128** |
| Sugar | 100,277 |
| Rum | 36,791 |
| Citrus Products | 209 |
| Coffee Products | 4,350 |
| Cocoa Products | 502 |
| NON-TRADITIONAL EXPORTS | 519,663 |
| **Food:** | **77,936** |
| Cucumbers | 0 |
| Pumpkins | 381 |
| Dasheens | 1,248 |
| Sweet Potatoes | 1,689 |
| Yams | 12,593 |
| Mangoes | 0 |
| Papayas | 2,436 |
| Ackee | 6,149 |
| Fish, Crustaceans & Molluscs | 7,460 |
| Other Food Ex ports | 45,980 |
| Beverages & Tobacco (excl. Rum): | 45,642 |
| Beverages | 45,592 |
| Tobacco | 51 |
| **Crude Materials:** | **73,658** |
| Cut Flowers | 0 |
| Foliage & Other Live Plants | 0 |
| Limestone | 601 |
| Other | 73,057 |
| **Other:** | **322,427** |
| Mineral Fuels, etc. | 261,559 |
| Animal & Vegetable Oils & Fats | 68 |
| Chemicals | 42,047 |
| Manufactured Goods | 9,290 |
| Machinery and Transport Equipment | 1,036 |
| Wearing Apparel | 1,258 |
| Furniture | 915 |
| Other Domestic Exports | 6,254 |
| **TOTAL DOMESTIC EXPORTS** | **1,729,595** |
| **RE-EXPORTS** | **40,944** |
| **TOTAL EXPORTS** | **1,770,539** |

p – preliminary
Note: Exports are as reported by the Statistical Institute of Jamaica
*Source: Statistical Institute of Jamaica. Taken from Economic and Social Survey Jamaica, 2007.*

### *2.2.3 Profile of the Informal Sector*

There is limited statistical data on the informal sector, but an IDB study by Robles et al (2006)[23] entitled *The Informal Sector in Jamaica* provided insight into this sector. It noted that the size of the informal sector was an estimated 43% of official GDP in 2001. The study indicates that women make up a relatively large portion of this sector (57% compared to 50% in the formal sector of the economy). These estimates on the size of the sector were based on electricity consumption which was 40% of total GDP in 2000. The main characteristics of the informal sector were the involvement in low-productivity, labour intensive activities.

Some 70% of workers in this sector had no formal contracts. The informal sector entrepreneur tended to be older, and was better educated than workers in the formal sector. Some 25% of MSMEs spend time improving or developing new products and services. And, 65% own land and had a property title. Some 61% said the title was registered. Persons in the sector make limited use of Business Development Services apart from accounting and tax services. In terms of size, the study reported that in 2001 there were 496,330 workers in the informal sector. Total income of these workers in 2001 was J$102,454,000 (29%). The study also noted that there are important gender differences across different types of enterprises. Women comprise the majority of own account workers (58%) and 79% of small enterprises (5-20 people). Women micro-entrepreneurs in the informal sector would therefore need special support to facilitate their development and improve their capacity to take advantage of the opportunities provided under the EPA.

## 2.3. Sectoral Performance

**Goods Producing Sector**

In sharp contrast to the Services sector, data for 2007 show that the contribution of the Goods Producing Sector to GDP was 34% compared to 73% (See Table 2.9). Only 16% of the labour employed in this sector was women. Overall, the goods producing sector accounted for 51% of employed males as compared to 14% of employed females. The *'Agriculture, Forestry and Fishing'* sector contributed 5% to GDP. It employed 25% of male workers and 9% of female workers. Males were also the majority of workers in the Mining, Construction and Manufacturing sectors. For the Goods Producing Sector, the major contributors to GDP were *'Construction'* (11%) and *'Manufacturing'* (13%) both of which are male-dominated. This gendered pattern of employment and the existing trade structure are expected to have an unequal impact on men and women as a result of trade liberalization. This is because women are under-represented in the sectors likely to benefit more, such as manufacturing and minerals. Additional analysis of employment in the goods producing sector (by gender) is presented in Chapter 4.

### *2.3.1 Agriculture, Forestry and Fishing*

Agriculture (which includes fishing), is an important sector in terms of employment, especially for males who account for 80 per cent of the total labour force compared to 20 per cent of females. The expectation is that each sex will be impacted by the EPA in a similar proportion.

[23] Robles et al, http://sta.uwi.edu/conferences/salises/documents/Thomas%20D.pdf

While important in terms of employment, the contribution of Agriculture to GDP is small, accounting for 5.3% in 2007 as indicated in Table 2.9. (See also Appendix B.2). Jamaica's agriculture sector produces a variety of crops which are classified as either Traditional or Non-Traditional Export Crops. Table 2.13 shows the production output for Traditional Export Crops. In 2007, citrus products totalled 124,553 tonnes while production of bananas was recorded at 17,473 tonnes. This represented an almost fifty percent reduction in production from the previous year which was related to the passage of Hurricane Dean which hit Jamaica in August 2007. It negatively affected the agriculture sector and in particular, the banana industry. This underscores the vulnerability of the agricultural sector to climate change and natural hazards as hurricanes which occur between June and November each year. In recent years, the intensity of hurricanes has increased with a devastating impact on the lives of most Jamaicans and on the economy.

**Table 2.13 PRODUCTION OF SELECTED TRADITIONAL EXPORT CROPS, 2007**

| PARTICULARS | CROP-YEAR | UNIT | 2007 |
|---|---|---|---|
| 1.Cane Sugar (Commercial) | | | |
| Estimated Total Production | | Tonnes | 159,400 |
| 2. Bananas (for Export) | January-December | | |
| Estimated Total Production | | Tonnes | 17,473 |
| 3. Citrus | July - June | | |
| Estimated Total Production | | Tonnes | 124,553 |
| Sweet Orange | | " | 112,632 |
| Grape fruit | | " | 1,607 |
| Ortanique | | " | 8,598 |
| Ugli | | " | 1,716 |
| 4. Coffee (Cherry) | August - July | | |
| Estimated Total Production | | Tonnes | 15,117 |
| Blue Mountain | | " | 12,939 |
| Non-Blue Mountain | | " | 2,178 |
| 5. Cocoa | October-September | | |
| a) Deliveries to Processing Plants | | Tonnes | 1,915 |
| b) Out-turn from Processing Plants | | Tonnes | 768 |
| 6. Coconut | January-December | mil lions | 95.2 |

Source: Commodity Boards & Sugar Industry Authority.

*Source: Economic and Social Survey Jamaica, 2007.*

In examining the value of Traditional Agricultural Exports, Table 2.12 shows that coffee (with an export value of US$22.4 million in 2007) accounted for more than 50% of the revenue in this category. Banana followed next with exports valued at US$9.22 million representing approximately 25% of the export value from Traditional Agriculture. Sugar production in 2007 totaled 159,400 tonnes (Table 2.13), with exports (Table C.2b) recording US$101.25 million. The European Union represented the main market for sugar exports with over 95% of the quantity and value of sugar exports.

Non-Traditional Agriculture Exports were valued at US$24.5 million in 2007 (Table 2.12). 'Yams' (51.4%) and 'Ackee' (25.1%) represented the majority of this export value.
In terms of production, 427,301 tonnes of domestic crops were produced in 2007 with 'Vegetables' and 'Yams' accounting for the majority of production (Appendix C.3). Within the sub-group of Vegetables, the highest level of production was yielded by 'Pumpkins' and 'Cabbage'.

Overall, the livestock production in 2007 showed 'Hogs' and 'Poultry' contributing significantly to production within this sector (see Table 2.14).

**Table 2.14 LIVESTOCK PRODUCTION, 2007**

| PARTICULARS | UNIT | 2007$^{p}$ |
|---|---|---|
| **LIVE STOCK SLAUGHTER** | **Heads** | |
| Catt le | " | 23,413 |
| Hogs | " | 112,820 |
| Goats | " | 40,121 |
| Sheep | " | 541 |
| **MEAT, FISH AND DAIRY** | | |
| Beef and Veal | 000 kgs. | 5,539 |
| Goats Flesh | " " | 645 |
| Pork | " " | 7,239 |
| Mutt on | " " | 10 |
| Poultry | " " | 107,262 |
| Fish (Inl and) & Shrimp (r) | " " | |
| Fish (Marine) (r) | " " | |
| Eggs | Million | 115 |
| Milk | Million Litres | 14 |

p – preliminary
*Source: Ministry of Agriculture and Lands. Taken from Economic and Social Survey Jamaica, 2007.*

### *2.3.2 Mining and Quarrying*

Mining and quarrying are also male dominated sectors for employment. Total Bauxite production in 2007 was 14,568 tonnes (Table 2.15), with bauxite exports totaling 14,476 tonnes. Alumina production equaled 3,941 tonnes and exports were 3,896 tonnes. The total export value of crude bauxite and alumina was US$1,310 million (Table 2.16), resulting in a foreign exchange flow of over US$580 million.

**Table 2.15 JAMAICA BAUXITE/ALUMINA PRODUCTION AND EXPORTS, 2007 ('000 tonnes)**

| | 2007$^{p}$ |
|---|---|
| **Production** | |
| Crude Bauxite (a) | 4,417.9 |
| Alumina | 3,940.6 |
| Bauxite Equivalent of Alumina (b) | 10,149.8 |
| Total Bauxite Production (c) | 14,567.7 |
| **Exports** | |
| Crude Bauxite (a) | 4,451.6 |

| | |
|---|---|
| Alumina | 3,896.1 |
| Bauxite Equivalent of Alumina (b) | 10,024.7 |
| **Total Bauxite Exports (c)** | **14,476.4** |

p – preliminary
Note : (c) = (a) + (b)
Bauxite Equivalent of Alumina is unprocessed bauxite used in alumina product ion.
Source: Jamaica Bauxite Institute. *Taken from Economic and Social Survey Jamaica, 2007.*

**Table 2.16 TOTAL VALUE OF EXPORTS & FOREIGN EXCHANGE EARNINGS 2007 (US$ million)**

| | **2007** |
|---|---|
| ***Value of Exports:*** | |
| Crude Bauxite Exports | 113 |
| Alumina Exports | 1,196.90 |
| Total Export Value | 1,309.90 |
| ***Foreign Exchange Earnings:*** | |
| Total Tax Receipts ( 1) | 96.9 |
| Income Tax | 26.8 |
| Bauxite Levy | 70.1 |
| Royalty (2) | 10.7 |
| Local Cost & Net Forex a -(3) | 472.8 |
| Foreign Exchange Inflows (4) | 580.3 |

a - Net forex is earning by Government owned entities in the Bauxite/Alumina sub-sector (4)=(1)+(2)=(3).
Source: Compiled from data supplied by Jamaica Bauxite Institute. *Taken from Economic and Social Survey Jamaica, 2007.*

Jamaica's production of Industrial Minerals totaled 10,987 tonnes in 2007 (Table 2.17). 'Sand and Gravel' (32.9%), 'Marl & Fill' (29.4%) and 'Limestone' (26.9%) represented the majority of production.

**Table 2.17 PRODUCTION OF INDUSTRIAL MINERALS, 2007 ('000 tonnes)**

| **INDUSTRIAL MINERALS** | **2007p** |
|---|---|
| Silica Sand | 14.5 |
| Limestone | 2,950.00 |
| Gypsum | 227.7 |
| Marble | 0.1 |
| Sand and Gravel | 3,611.00 |
| Marl & Fill | 3,228.00 |
| Pozzolan | 114.5 |
| Shale | 168.4 |
| Clay | 663.8 |
| TOTAL | 10,978.00 |

r-revised to correct classification errors discovered in 2004.
p-preliminary
Source: Mines and Geology Division. *Taken from Economic and Social Survey Jamaica, 2007.*

### *2.3.3 Manufacturing and Processing*

As previously noted, Manufacturing is male dominated (72% males and 28% females). Major contributions were made to this sector in terms of production levels by: Cement (760,815 tonnes), Fuel Oil (625,249 thousand litres) and Animal Feeds (378,165 tonnes). Other significant outputs are highlighted in Table 2.18.

**Table 2.18 OUTPUT OF SELECTED MANUFACTURED COMMODITIES, 2006**

| PRODUCTS | UNIT | 2006^p |
|---|---|---|
| *FOOD PRO CESS ING* | | |
| Poultry Meat [a] | tonnes | 104,012 |
| Animal Feeds | tonnes | 378,165 |
| Condensed Milk | tonnes | 11,436 |
| Edible Oils | tonnes | 21,122 |
| Edible Fats | tonnes | 7,581 |
| Flour | tonnes | 129,322 |
| Cornmeal | tonnes | 11,196 |
| Sugar | tonnes | 142,806 |
| Molasses | tonnes | 73,426 |
| Dairy Products | tonnes | 4,877 |
| *BEVERAGES AND TOBACCO* | | |
| Alcohol (incl. rum) | 000 ltrs | 22,783 |
| Beer | 000 ltrs | 66,898 |
| Stout | 000 ltrs | 20,057 |
| Carbonated Beverages | 000 ltrs | 8,500 |
| Cigarettes | 000's | 0 |
| *CHEMICALS & CHEMICAL PRODUCTS* | | |
| Oxygen | cu.mtrs | 10,083 |
| Acetylene | cu.mtrs | 133,743 |
| Sulphuric Acid | tonnes | 15,937 |
| Aluminium Sulphate | tonnes | 12,161 |
| Sulphonic Acid | tonnes | 7,719 |
| Salt (NaCl) | tonnes | 13,358 |
| Fertilizer | tonnes | 48,827 |
| Detergent | tonnes | 1,609 |
| Paint | 000 ltrs | 11,598 |
| *PETROLEUM PRODUCTS* | | |
| Gasolene | 000 ltrs | 178,738 |
| LPG | 000 ltrs | 18,388 |
| Fuel Oil | 000 ltrs | 625,249 |
| Turbo Fuel | 000 ltrs | 81,764 |
| Automotive Diesel Oil | 000 ltrs | 254,425 |
| Other Petroleum Products | 000 ltrs | 53,558 |
| ***NON METALLIC MINERALS*** | | |
| Cement | Tonnes | 760,815 |
| Plastic Products: | | |
| Boots | Tonnes | 246 |

| | | |
|---|---|---|
| Other Plastic Products [b] | Tonnes | 6,560 |

b- includes PET bottles r – revised p-preliminary

*Source: Survey conducted by the PIOJ. Taken from Economic and Social Survey Jamaica, 2007.*

### *2.3.4 Construction and Installation*

In 2007, the Construction Industry contributed J$26,629 million (11%) to GDP in Producers' Values at Constant (1996) Prices. ESSJ 2007: 15.1). It employed 123,700 persons: 117,700 males (95%) and 6,000 females (5%). (October 2007: STATIN Labour Force).[24] This shows that the sub-sector is gender-sensitive in favour of males. The ESSJ 2007 notes the Ministry of Housing's progress in strengthening the policy framework with: a Construction Industry Policy, a National Housing Policy and a Joint Venture Policy. As previously noted, the absence of sex disaggregated data on these sub-sectors, prevented any detailed analysis of the sector. However, with a high concentration of males employed in the sub-sector and because cement is a major input for the sector, the conclusion is that it is likely to be impacted by the EPA.

**Services Sector**

The Service Sector is female intensive, employing 56% of females and 44% of males (Table 2.9). It accounted for 86% of employed female workers compared to 49% of male workers. Sub-sectors with a majority of females employed were:

a. *'Distributive Trade'* which accounted for 63% of the sub-sector's labour force and contributed over 20% to GDP;
b. *'Miscellaneous Services'* which accounted for 62% of the sub-sector's labour force, but contributed only 2% to GDP. This sub-sector includes: *'Household & Non-Profit Institutions'* and *'Community, Social & Personal Services'*. This sub-sector accounts for 41% of females, compared to 18% of males.

However, these sectors contribute relatively little, especially '*Miscellaneous Services'*, to GDP indicating that earnings are very low. The concentration of women in these sub-sectors suggests limited benefits for female employment under the provisions of the EPA. The sector's importance in terms of female employment and its contribution to GDP, required a detailed gender analysis but this was not possible as previously noted because of the absence of sex disaggregated micro-data. Proxies were therefore used to assess the likely impact on this sector and are presented in Chapter 4.

### *2.3.5 Energy and Electricity*

The Energy and Electricity sub-sector is male-dominated, (78% males and 22% females). Jamaica's ability to take advantage of opportunities under the EPA is also influenced by global oil prices. High energy costs are reflected in the value of crude oil imports which totaled US$515.4 million in 2007 for approximately 8.3 million barrels of oil (Table 2.19). Additionally, another US$1.48 billion was spent on refined oil products (petroleum products) resulting in Jamaica's oil bill (i.e. value of crude oil and refined product imports) totaling approximately US$2.0 billion (See Appendix E). Further increases in oil prices in 2008 raised energy costs much higher.

[24] STATIN Labour Force 2007: 23 and 29

**Table 2.19 VOLUME AND VALUE OF CRUDE OIL IMPORTS, 2007**

| | 2007P | |
|---|---|---|
| | Volume ('000 Bls) | Value ('000 US $) |
| **REFINERY** | | |
| Venezuelan Crude | 7,950.30 | 491,236.00 |
| Mexican Crude | 349.7 | 20,007.70 |
| Oriente Crude | 61.1 | 4,169.70 |
| TO TAL CRUDE OIL | 8,361.10 | 515,413.40 |
| Average cost per barrel for crude oil (US$) | - | 61.64 |

Bbls – Barrels

US $ - United States Dollars
Source: Com piled from data sup plied from the Petrojam Refinery.

*Taken from Economic and Social Survey Jamaica, 2007.*

## *2.3.6 Transport, Storage and Communication*

Trade has implications for transport, storage and communications, hence its importance to the current gender analysis of the EPA. A review of ship traffic and cargo flows shows that a total of 3,758 vessels visited Jamaica in 2007 (Appendix F). The overall volume of cargo handled (inclusive of petroleum products) at all ports totaled 31,305 thousand tones with domestic cargo accounting for 20,293 thousand tones. This Services sub-sector is also male dominated (80% males and 20% females). The majority of port workers and personnel in the shipping industry are male and changes in the volume of cargo handled will have a more positive impact on male employment in the sector than on female employment. Most port workers are males and are unionized. This implies that wages and working conditions, are likely to be better for women,. A similar impact is anticipated as storage and communications sectors are also male dominated.

## *2.3.7 Tourism*

Tourism is a major sector for revenue and employment and will be impacted by the EPA as it is part of the services sector. In 2005, earnings from the sector totaled US$1,545 million. The ESSJ 2007 notes that the tourism as part of the Miscellaneous Services sub-sector, contributed 10% to GDP in 2007, and the accommodation sector employed 33,598 persons but the data were not sex disaggregated.[25] However Dunn and Dunn (2002) note in a study of persons employed in the tourism sector in the resort town of Negril, that 67% of persons interviewed were males and 33% were females (Dunn and Dunn (2002: 109-110). They also report that a study of craft vendors which showed that more than half were women (55%); men accounted for 45%. This demonstrates that the sex distribution in the sector is dependent on the sub-sector and occupations (e.g. male bartenders). The accommodation sector does however employ mainly females as housekeepers, entertainers, nannies, front desk personnel and managers. Data on the employed labour force by industry shows females dominating in the category “Wholesale, Retail, Hotels and Restaurants

[25] STATIN is preparing Satellite accounts for the country that would provide more disaggregated data.

Services" (160,500 females, 62% to 97,200 males, 38%) in October 2007.[26] Data also show a total of 3 million tourist arrivals in 2006. Stop-Over arrivals accounted for 56% of Total Arrivals which has implications for the accommodation sub-sector.

**Table 2.20 TOURISM ARRIVALS & OTHER PERFORMANCE INDICATORS 2007**

| INDICATORS | Jan - Feb 2007 |
|---|---|
| **I. Total Stop-Over Arrivals** | **262,705** |
| Foreign nationals | 251,740 |
| Non-resident Jamaicans | 10,965 |
| **II. Cruise Passengers Arrivals** | **266,858** |
| **TOTAL ARRIVALS** | **529,563** |
| Average Length per Stay / nights | 9.7 |
| Earnings (US$M) | |

*Source: Caribbean Tourism Organization.*

**Table 2.21 TOURIST STOP-OVER ARRIVALS BY MAIN MARKET**

| COUNTRY OF ORIGIN | Jan - Feb 2007 |
|---|---|
| United States | 161,740 |
| Canada | 45,987 |
| United Kingdom | 27,257 |
| Other European | 17,123 |
| Caribbean | 7,262 |
| Latin America | 1,703 |
| Japan | 335 |
| Other | 1,298 |
| **TOTAL** | **262,705** |

*Source: Caribbean Tourism Organization.*

Tables 2.20 and 2.21 highlight the vulnerability of Jamaica's tourism sector to external shocks. Analysis of Stopover Visitors shows that 62% were from the USA and 17% were from Europe. They will be impacted by the current global recession which would in turn negatively impact businesses, workers in the sector and revenue. For example, in 2008, just before the December 15 start of the Winter Tourist Season, the impact of global recession was reflected in the front page headline of the Saturday Gleaner of December 13, 2008: "*Sandals lays off 650: Resorts hurting from economic tsunami*".[27] The article by Janet Silvera noted that 285 of 650 persons were employed to Sandals hotels in Jamaica, but indicated that 104 of those displaced would be joining the Italian Village at Beaches Turks and Caicos. Most of the hotel workers affected would be females as the majority of workers in the tourism accommodation sector work in housekeeping.

The vulnerability of the sector to natural hazards is also evident in data which show that damage and losses caused by Hurricane Dean in 2007 were J$43.7 million (ESSJ 2007: 5.3).

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[26] The Labour Force 2007, STATIN: 46.
[27] See Saturday Gleaner www.jamaicagleaner.com Vol. 174 No 298 page 1 December 13 2008

The likely effects of the EPA on the female-dominated services sector will therefore need further research and there are various scenarios about the possible effects. Liberalization of services could mean that more Europeans would come to Jamaica for work and business. Based on current observation, they are likely to use the opportunity to combine work and vacations in the country's many tourist resorts and if this occurs women working in the accommodation sub-sector would be positively impacted. European investments in tourism could also have a positive impact on the construction sector. For example, in 2007, construction and renovation projects by Spanish interests pointed to eight tourism construction projects that would result in an estimated 7,286 rooms. (ESSJ 2007: 14.4-14.5). While data on total employment in construction created from these investments was not available, these projects are positively impacting males who dominate the construction sector. When completed, the hotel accommodation would more positively impact female employment.

### *2.3.8 Entertainment* [28]

Entertainment is part of the sector classified as cultural industries which Nurse (2006) refers to as "aesthetic, identify and copyrightable goods, services and intellectual property". He also notes that it applies to economic activities of artists, arts enterprises and cultural entrepreneurs, for-profit as well as not-for-profit, in the production, distribution and consumption of film, television, literature, music, theatre, dance, the visual arts, masquerade, multimedia, animation, and fashion among other areas. UNESCO notes that in 2002, the import value of this sector in Jamaica was US$52,713.20, which far outweighed exports which were valued at US$482.50. Jamaica therefore had a negative trade balance –US$52,231.

**Table 2.22 CULTURAL INDUSTRIES—EXPORTS AND IMPORTS, MERCHANDISE TRADE, JAMAICA, 2002**

| | **Jamaica** |
|---|---|
| POPULATION | 2,528,000* |
| Total Exports in Core Cultural Goods | US$482.5 |
| Total Imports of Cultural Goods | US$52,713.20 |
| BALANCE | US$-52,230.70 |

Notes: Population data are for the following years, 1996*.
Source: UNESCO, International Flow of Selected Cultural Goods and Services, 1994-2003. UNESCO Institute for Statistics. http://www.uis.unesco.org accessed 02/03/2008.

Nurse's study entitled "*The Cultural Industries in CARICOM: Trade and Development Challenges*" prepared for the Caribbean Regional Negotiating Machinery provides some valuable insight into this sector.[29] Sex disaggregated data on the entertainment sector were not available making it difficult to assess the likely gender impact of the EPA in this sub-sector. Entertainment includes tangible goods such as books, other printed materials, recorded media, visual arts, and audio-visual media. It does not include revenue from the fashion sector, trade in services, royalty earnings, and earnings from cultural and festival tourism which could realise significant earnings. The potential revenue from this sector is yet to be determined and requires further research. It is however known that males comprise the majority

[28] Data on this section were drawn from Nurse (2006) retrieved from http://www.crnm.org/documents/cultural_industries/Final_Cultural_Industries_Study_21Dec07.pdf. However, the study did not disaggregate data by sex for the various cultural sub-sectors.
[29] http://www.crnm.org/documents/cultural_industries/Final_Cultural_Industries_Study_21Dec07.pdf.

of the popular music artistes and entertainers involved in the export of cultural industries. But females as fashion industry models, dominate exports.

Jamaica's fifth report to CEDAW addresses gender differentials, noting challenges for women in the lucrative global reggae performing and recording industry. It also notes the establishment of the Jamaica Association of Female Musicians to address gender issues related to performing and management and to help women artistes manage their careers.
The EPA could provide work for women artistes, but further research is needed.

### *2.3.9 Distributive Trade*

The Distributive Sector is very important for trade, because imported goods reach the final consumer thorough these channels. As such it is expected to be significantly impacted by the EPA. The Ministry of Industry and Commerce has policy and regulatory oversight of the sector which is implemented through four agencies: the Fair Trading Commission (FTC), the Consumer Affairs Commission (CAC) and the Bureau of Standards Jamaica (BSJ) and the Trade Board. Legislation governs the operation of these agencies (e.g. The Fair Trading Act; the Standards Act; the Weights and Measure Act; the Processes Food Act and the Trade Act). In 2007, new legislation was being developed.

**Table 2.23 OUTPUTS AND EMPLOYMENT TRENDS IN DISTRIBUTION, 2007**

| | **2007** |
|---|---|
| Contribution to GDP (%) | 21.9 |
| Distribution Growth Rate (%) | 2.5 |
| Over all GDP Growth (%) | 1.1 |
| Persons Employed | 165,471 |
| Share of Tot al Employment (%) | 14.6 |
| GDP per worker (constant 1996 prices, $) | 329,779.8 |

Source: Statistical Institute of Jamaica and Planning Institute of Jamaica
*Taken from Economic and Social Survey Jamaica, 2007.*

In 2007, the Distributive Trade sector accounted for 22% of GDP and represented the largest contribution to GDP (Table 22.3). It provided employment for 165,471 persons (5% of Total Employment). Females accounted for over 62% of persons employed in 2007 and 64% in 2006, indicating that it is gender–sensitive. Output per worker was estimated at $329,780 (ESSJ 2007: 19.6).

*Structure:* Data on the structure of the sector shows that it includes: 58% micro-enterprises; 30% small and 12% large and medium enterprises. This means that female self-employed entrepreneurs are well represented in the sector. Large and medium-sized companies accounted for 86% of total sales in 2007 compared with 12% for small businesses and 2% for micro-entrepreneurs. The micro-entrepreneurs therefore accounted for the smallest volume of sales. The composition and volume of sales in each sub-sector are important for analyzing the gender impact of the EPA. Hamilton's (2009) profile of small and medium sized enterprises and the IDB's (2006) study on the informal sector, both provide indications of the vulnerability as well as resilience of the persons working in the sector. The ESSJ 2007 notes that based on an analysis of General Consumption Tax (GCT) returns, the sector is comprised of nine (9) goods categories as summarized in Table 2.24.

**TABLE 2.24 NUMBER OF MSMEs ACCORDING TO SECTOR WHICH MADE GCT CONTRIBUTIONS**

| Categories | Micro | Small |
|---|---|---|
| Agriculture | 126 | 48 |
| Mining | 44 | 16 |
| Manufacturing | 703 | 374 |
| Energy and Water | 8 | 2 |
| Construction | 439 | 112 |
| Distribution | 3,891 | 1830 |
| Miscellaneous | 585 | 143 |
| Transport and Communication | 711 | 190 |
| Financial Services | 195 | 69 |
| Rent State and Personal | 2207 | 449 |
| Government Services | 1080 | 238 |
| **TOTAL** | **9989** | **3471** |

*Source: ESSJ 2007:13.4, Compiled from GCT data.*

*Growth of Sales*: The table shows that the largest growth in sales in rank order was in: Food (20%), Hardware (16%) and Chemicals (10%)

*Percentage of Sales:* The largest percentages of sales were in the sub-categories of: Other Manufactured Goods (33%); Food (20%); Minerals (16%) and Hardware (10%). The smallest rate of growth in sales was in the Textiles (2%) and furniture (2%).

Table 2.25 indicates the likely distribution of males and females in each of the sub-sectors. This mirrors ESSJ's data that 62% of the Distribution Sector workers are female.

**Table 2.25 GROWTH IN SALES IN DISTRIBUTION 2007**

| Distributive Sector and Sub-Sectors | Sales Growth | Percent of Sales | Estimated Gender Distribution in Employment |
|---|---|---|---|
| ***Food, Beverages and Tobacco*** Sub-sectors: General Groceries, Agricultural Products, Seafood, Meat and Eggs, Beverages, Baked Products and Confectionery, Animal Feeds and Pet Supplies | 15 | 20 | Female |
| ***Hardware, Building Supplies and Electrical Goods*** Sub-sectors: Lumber and Building Materials, and General Hardware and Building Materials and Electrical Goods | 13 | 10 | Male |
| ***Chemicals Pharmaceuticals and Cosmetics*** Sub-sectors: Pharmaceuticals and Cosmetics, Industrial and Non-Industrial Chemicals | 6.4 | 7 | Female |
| ***Automobiles, Commercial and Transport Equipment*** Sub-sectors: Motor Vehicles, Auto Parts & Accessories, Industrial, Commercial and Agriculture Machinery | 6.1 | 8 | Male |
| ***Textiles Clothing and Shoes*** Sub-sectors: Textiles, Wearing Apparel and Footwear, Distributors of Clothes and Footwear | 5 | 2 | Female |
| ***Electronics, Musical and Photographic Equipment*** Sub-sectors: Cellular Phones and Accessories, Computers and | 4 | 3 | Male/Female |

| | | | |
|---|---|---|---|
| Computer Accessories, Office Equipment and Supplies, Radio Television & Electronics, Musical and Photographic Equipment | | | |
| ***Minerals, Fuels, Lubricants and Petroleum Products***<br>Sub-sectors: Cooking Gas for Domestic and Industrial Purposes,<br>Distributors of Petroleum/Gasoline, Lubricants and Oils | -12 | 16 | Male |
| ***Furniture, Furnishings, Office Equipment and Jewellery***<br>Sub-sectors: Furniture, Furnishings, and Household Equipment, Jewellery, Watches and Clocks | -7 | 2 | Female |
| ***Other Manufactured Goods***<br>Sub-sectors: Other Manufactured Wholesale Items, General Importers & Exporters, Gift Shops Craft and Arcade Vendors | 0.0 | 33 | Female |
| TOTAL | - | 100 | - |

*Source: Developed from ESSJ 2007 data with an estimation of the likely female intensity given the overall statistic that females account for over 62% of the persons employed.*

A review of data on salaries from the Jamaica Employers Federation (JEF) Wage Salary and Benefits Survey 2006 showed that the Mean Salary in the Distribution sector ranged from a minimum annual salary of J$652, 245 – 761,057. This ranked at the lower end of the salary scale across all sectors. Workers in the Utilities sector were the highest paid (J$1,877,602 – 1,907,027) and workers in the Education sector were paid the lowest (J$722,719- $842,040).[30] The general pattern confirms lower wages in a female dominated sector and higher wages in male dominated sectors.

In terms of the likely gender impact of the EPA, we note that workers in large companies (over 10 persons using STATIN's definition) who account for the greatest volume of sales, may benefit from increased EPA-related trade if EU investors use the network of larger distribution companies in Jamaica. Alternatively workers in local companies could be displaced if EU companies set up their own distribution network. In either scenario, females are likely to be positively or negatively affected given their dominance as workers in the sector. At another level, the EPA's impact on the sector will depend on the import component of the goods being distributed in relation to the distribution of locally produced goods. Further analysis is needed on the content of goods and their tariff liberalization or exclusions status. This underscores the need for more research to assess the net effect of the EPA on this sector. This requires data on the specific products and their components in each of the nine sub-sectors. Food accounts for one of the largest percentages of sales and food is on the excluded list. This could mean that local distributors handling food will be protected by existing tariffs which would make it less competitive for EU companies.

In any event, the EPA is likely to result in an increased volume of goods being traded. This could mean an increase in sales in the various areas of the distributive trade.

**Chapter Summary**

- The first half of this chapter highlighted gender inequalities in the labour market which result in females being disadvantaged and their concentration in some occupations that are low status and pay low wages.

The second half of the chapter provided:

[30] (Jamaica Employers Federation Wage Salary and Benefits Survey 2006: xi).

- an overview of the macro economy and then examined the contribution of various secrors to the economy in terms of the performance in relation to revenue and production;
- a basic profile of male and female employment in the various sectors to examine how they are likely to be affected by implementation of the EPA.

The analysis pointed to the need for research to fill various data gaps at the micro level including the collection of sex disaggregated micro data especially in the informal sector and the services sectors.

# 3. Gender Profile and Gender Analysis of the Budget

The information in this chapter complements the analysis in the previous chapter which outlines various forms of gender discrimination in the labour market which confirms that the labour market is not gender neutral. The EPA is therefore expected to have a differential impact on the two sexes as groups, as females have lower labour force participation rates, higher rates of unemployment, higher rates of self-employment and lower wages. The earlier data also confirmed a domination of males in the goods producing sector and females in the services sector, which also means that the EPA will have a differential gender impact on both sectors.

The first section of the chapter provides a gender profile of Jamaica from a social and welfare perspective. This includes some basic reflections on education and training as well as data on household size, composition and consumption; gender and household headship, and a gender distribution of unpaid work. The second section presents data on government expenditure and revenue to examine spending on social services. This is used to assess how a loss of tariff revenue is likely to impact on budget allocations for social services as this would negatively impact single female headed households and rural households that are among the poorest.

## 3.1. Human Development

### *3.1.1 Education and Training*

Capacity to utilize employment opportunities from the EPA will be influenced by education, training and certification. This has gender implications as females are more likely than males to participate in and complete education programmes. However higher female participation has not automatically translated into better job opportunities for females and there is still a "glass ceiling" in some areas of employment at the higher levels.

The main gender issues in education from recent studies (Leo-Rhynie and Bailey 2004) relate to the relevance of the curriculum to the job market, male under-participation beyond secondary school; the high cost of tertiary education which makes it unaffordable to many young people from working class backgrounds; overcoming and gender stereotypes in the curriculum that encourages males and females to pursue different careers. Absence of a gendered approach to education results in unequal outcomes for both sexes. The female-dominated teaching profession also helps to reinforce gender stereotypes and affects education outcomes for males.

An additional issue that affects both sexes is that facilities to educate and train women and men with special needs and disabilities are not adequately developed and access for persons with disabilities to education institutions is often limited (physical and technology). This increases the risk of poverty among this population group.

Other data on education are presented in the section assessing national capacity to take advantage of emerging opportunities for temporary employment in Europe in the 29 categories specified in the EPA.

Jamaica's education system poses several challenges to gender equality in the labour market. Jamaica's Development Plan *"Vision 2030 Jamaica*" notes that there is a "differentiated education system with varying quality, resources and status that disadvantages both working class girls & boys but which has a greater impact on boys than girls especially after Grade 9." Institutional barriers in the education system reproduce sex segregation of the curriculum, particularly in technical areas. This in turn contributes to sex segregation in the labour market based on a strict sexual division of labour. The education system is not very responsive to emerging labour market needs and as such the non-traditional employment opportunities (e.g. the performing arts) receive considerably less support than traditional academic careers for males and females. The academic and professional training programmes in tertiary and vocational educational institutions exist but need to be more diversified to effectively meet emerging opportunities offered by the EPA in both the services in EPA- priority areas as well as the goods producing sectors for niche market products in Europe.

## 3.2. Poverty Analysis

Human development is undermined by poverty which in turn limits capacity to participate in and benefit from emerging trade opportunities. The analysis shows wide disparities among households and across regions which indicate that the playing field is not level and as such the impact of trade will be uneven. Analysis of the relationship between gender, household headship and poverty indicates that poverty is feminised. Characteristics of this are examined below.

### *3.2.1 Gender and Household Headship*

The Jamaica Survey of Living Conditions (2006:7) notes that in 2006 some 47% of households surveyed reported females as head. Of 1,917 households surveyed, 1,037 (53%) were headed by males and 880 (47%) were headed by females. Households in the poorest quintile had 51% of households headed by females compared to 49% of male headed households. Households in the Kingston Metropolitan Area (KMA) recorded a higher percentage of female headed households (over 55%) compared to 45% of male headed households. In rural areas, 42% of households were female-headed compared to 58% of male headed households. In contrast, among households in the wealthiest quintile, 37% were female-headed and 63% were male–headed.

### 3.2.2 Gender and Household Composition

Consumption status is influenced by household size and composition as well as gender and household headship. Analysis of the data in Table 3.1 shows gender differences in the composition and size of households. Female headed households were larger than male households (3.6 persons compared to 3.0 persons). They had more children (1.3 compared to 0.8 for males); had more adult females (1.6 compared to 0.8 for males); and has fewer adult males (0.8 compared to 1.3 for males). This means that goods consumed in FHHs have to feed a larger number of adults and children.

**TABLE 3.1 HOUSEHOLD COMPOSITION BY SEX OF HOUSEHOLD HEAD AND REGION 2006**

| Region | SEX OF HEAD OF HOUSEHOLD | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Males | | | | | Female | | | | |
| | HH Members Analyzed (N) | Mean Total Size | Mean N of Adult Males | Mean N of Adult Females | Mean N of Children | HH Members Analyzed (N) | Mean Total Size | Mean N of Adult Males | Mean N of Adult Females | Mean N of Children |
| KMA | 715 | 2.7 | 1.3 | 0.9 | 0.6 | 1093 | 3.3 | 0.7 | 1.5 | 1.2 |
| Other Towns | 656 | 3.1 | 1.3 | 0.8 | 0.7 | 641 | 3.2 | 0.8 | 1.6 | 1.2 |
| Rural Areas | 1725 | 3.1 | 1.4 | 0.8 | 0.9 | 1470 | 4.1 | 0.9 | 1.6 | 1.4 |
| Jamaica | 3096 | 3 | 1.3 | 0.8 | 0.8 | 3204 | 3.6 | 0.8 | 1.6 | 1.3 |

*Source: JSLC 2006:80, STATIN.*

### 3.2.3 Gender and Household Consumption

Male headed households consume more than female headed households as indicated in Table 3.2. It shows the consistent disparity in the mean per capita household consumption of male and female headed households. Male households continued to outstrip female headed households in consumption expenditure. In 2006, mean per capita consumption was $155,169 for male-headed households compared to $125,027 for female-headed households.

**Table 3.2 HOUSEHOLD CONSUMPTION BY SEX OF HEAD OF HOUSEHOLD**

| Sex | Mean Per Capita Consumption by Sex of Household, Current Prices J$ (2001-2006) | | | | | |
|---|---|---|---|---|---|---|
| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 |
| Male | 86,146 | 93,644 | 97,813 | 109,917 | 140,019 | 155,169 |
| Female | 77,850 | 74,136 | 77,568 | 95,281 | 108,812 | 125,027 |

*Source: JSLC 2006:13 PIOJ, STATIN , PIOJ*

Consumption patterns by commodity groups indicate that Food and Beverages comprised 43% of consumption expenditure for All Jamaica. This represented a decline from 54% between 1996 and 2006. Housing and Household Expenses and Transportation accounted for the second and third highest percentages but these patterns vary across urban and rural areas.

Household non-consumption expenditure for 2006 was 11% for male headed households and 8% for female headed households. In the poorest quintile it was 2% compared to 14% in the wealthiest quintile. In terms of poverty 20% of persons in rural areas were poor compared to 9% in Kingston and 9% in Other Towns. Female headed households also have more children. In 2006, male headed households had 0.8 children while female headed households had 1.3 children.

### *3.2.4 Regional Distribution of Poverty*

Table 3.3 shows that rural households experienced a higher level of poverty (20%) than the national average (14%). Urban poverty was 9.4%.

**Table 3.3 INCIDENCE OF POVERTY BY REGION 1996-2006**

| Region | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| KMA | 17.2 | 9.3 | 8.6 | 10.6 | 9.9 | 7.6 | 10.4 | 9.5 | 14.3 | 9.6 | 9.4 |
| Other Towns | 22 | 14.8 | 13.4 | 12.1 | 16.6 | 13.3 | 18.7 | 15.8 | 7.8 | 7.2 | 9.2 |
| Rural Areas | 32.8 | 27.4 | 19.5 | 22 | 25.1 | 24.1 | 25.1 | 24.2 | 22.1 | 21.1 | 19.8 |
| Jamaica | 26.1 | 19.9 | 15.9 | 16.9 | 18.7 | 16.9 | 19.7 | 19.1 | 16.9 | 16.9 | 14.3 |

*Source: Jamaica Survey of Living Conditions 2006, STATIN*

### *3.2.5 Programme of Advancement Through Health and Education (PATH)*

This Social Safety Net Programme was introduced in 2002 and focuses on human capital development. PATH is a conditional cash transfer programme that requires compliance with established criteria for sustained receipt of benefits (JSLC 2006: 60). This includes 85% school attendance for children aged 6-17 years and a specified frequency of visits to the health centre for pregnant and lactating mothers and the elderly. Other beneficiaries include persons with disabilities and the adult poor. Distribution among beneficiaries was as follows: children 0-17 years (78%); Disabled (8%); Elderly (16%); and Adult Poor (2%). Pregnant and lactating mothers are also one of the target groups but very few took up the opportunity as their nursing period ended before their PATH benefit was processed. PATH distribution prioritizes rural areas (80%); Other Towns (13%) and Urban Areas (8%) (See Table 3.4). Sex disaggregated data shows that while there is gender equality in the beneficiaries, there are differences across categories of beneficiaries. The major gender disparities were among the elderly (39% males and 61% females); Adult Poor (16% males and 84% females). (JSLC 2006: 62).

**Table 3.4 DISTRIBUTION OF THE POOR AND PATH BENEFICIARIES SHOWING INCIDENCE OF POVERTY BY REGION 2006 (%)**

| Region | Incidence of Poverty | Distribution of the Poor | Distribution of PATH Beneficiaries |
|---|---|---|---|
| KMA | 9.4 | 21.3 | 8.4 |
| Other Towns | 9.2 | 13.1 | 13.1 |
| Rural Areas | 19.8 | 65.7 | 78.5 |
| Jamaica | 14.3 | 100.0 | 100.0 |

*Source: JSLC 2006: 64.*

### *3.2.6 Unpaid Work*

Women's higher vulnerability to poverty is related to their higher level of involvement than men in part-time and unpaid work related to their reproductive roles and household duties. The economic value of their contribution to national statistics is not reflected in contributions to GDP. The absence of this data is linked to the absence of national time-use studies which would indicate time spent in unpaid reproductive work.

To provide an indication of the sexual division of labour in relation to reproductive work in Jamaica, this study makes reference to the only known research on this issue conducted by Judith Wedderburn (1999) on Gender and Social Reproduction in Jamaica. The results showed that of 19 tasks carried out in the households studied, Household Helpers performed between eight and thirteen different types of activities over a seven day period. Middle class housewives in the same households performed between ten and thirteen of the same activities over the same period. The total hours worked by the women ranged from 35 hours to 117 hours during the seven day period and included both paid and unpaid work. Among the common unpaid activities were child care, cooking, cleaning, washing, ironing, and repairs. Very little time was spent on exercise, entertainment and leisure by either group of women. Working male adults in the same households studied were able to engage in paid work as a result of the unpaid work done by women in their homes.

Wedderburn argues that the value of the men's paid work should therefore be based on the males' earnings as well as the unwaged work of females in the same households. She also noted that women were more likely than men to be involved in voluntary sector unpaid activities with little decision-making power.[31] The findings of the study also confirmed the sharp division of gender roles which impact on the time available for paid work. Men's roles of the main family breadwinner resulted in them being concentrated in occupations that pay a family wage. Women's income is assumed to be supplementary to that of a main breadwinner, rather than a family wage. This occurs despite the fact that almost half of households are headed by single females.

Evidence of the gender inequalities in the labour market and the division of labour at the household level, indicate that trade effects cannot be gender neutral.

### *3.2.7 Remittances*

Remittances from Jamaicans living overseas are an important source of support to the economic survival of many Jamaican households. This money is generated by remittances from migrant labour abroad, mainly in North America and in Europe. This is a vital source of foreign exchange and is critical for the country's Balance of Payments (BOP). According to the Planning Institute of Jamaica (2007), remittance inflows surpassed all major exports including tourist expenditure and earnings from alumina exports. Annual remittance flows have grown steadily in recent years. In 2003, remittances amounted to US$1.4 billion or 17% of GNP (Dawson 2007 citing World Bank 2003). In 2007, private remittance inflows totaled over US$1.9 billion (ESSJ 2007) and this represented an increase of 11% relative to 2006 which recorded figures of over US$1.7 billion. Since the start of the 1990s, it is estimated that 80% of Jamaica's tertiary level graduates and 30% of the secondary level graduates have migrated (Dawson, 2007). Female migrants predominate in professions such as nursing and teaching. On the other hand, this outflow represents a considerable brain

[31] Wedderburn (2000) in Mohammed, P (2000). The Construction of Gender Indicators for Jamaica.

drain and loss of social capital. Remittance flows have become a crucial source of household income and investment and the Jamaican diaspora features significantly as the main market for cultural exports and as a particular segment of the tourism market (Nurse, 2004).

The JSLC (2006:66) notes that 45% of households surveyed reported receiving remittances in the previous twelve months. The levels were highest in the KMA (50%) Other Towns 45% and Rural Areas (42%). A higher percentage of female headed households relative to male headed households received remittances from all sources. Household heads received the majority of remittances as Money (62%), Goods (44%) and both Money and Goods (60%). The proportion of households receiving remittances increased progressively from 30% in the poorest quintile to 55% in the richest (JSLC 2006: 68). In terms of frequency, the majority (46% received yearly, 20% occasionally, and 19% half yearly. Some 3% received remittances monthly and 9% quarterly.

Table 3.5 shows the level of remittances to Jamaica from four main source countries. With the global recession, it is anticipated that there will be a reduction in remittances from the USA, Canada and the UK. This is expected to have a combined negative impact on households and indeed the wider Jamaican economy.

**Table 3.5 REMITTANCE BY SOURCE COUNTRIES (US$ MILLIONS), 2003-2008**

| **Source Country** | **2003** | **2004** | **2005** | **2006** | **2007** | **2008** | **% Change 2007/2008** |
|---|---|---|---|---|---|---|---|
| United States | 761.6 | 820.8 | 924.1 | 994.4 | 1,050.50 | 1,107.70 | 5.4 |
| United Kingdom | 317.4 | 404.6 | 356.7 | 417.6 | 500 | 509.2 | 1.8 |
| Canada | 63.5 | 86.5 | 105.4 | 111.5 | 136.2 | 157.2 | 15.4 |
| Cayman Islands | 63.5 | 102.6 | 154 | 155.7 | 152.2 | 140.2 | -7.9 |
| Other | 63.5 | 51.3 | 81.1 | 90.2 | 125.3 | 118.8 | -5.2 |
| **TOTAL** | **1,269.50** | **1,465.80** | **1,621.30** | **1,769.40** | **1,964.20** | **2,033.10** | **3.5** |

*Source: Bank of Jamaica & the Planning Institute of Jamaica.*

## 3.3. Inequality in Decision-Making

In addition to having higher levels of poverty than males as a group, and inequality in the labour market, females also experience gender inequality in access to leadership positions at national and institutional levels. Gender equality and the empowerment of women are challenged by structural inequality, the culture of political decision-making, as well as a system of patriarchy. This results in male leadership being accepted as the norm at national as well as institutional levels. The section below provides a profile of the current situation of gender and leadership.

### *3.3.1 Gender Distribution in National Leadership*

The data show that despite progress, males still dominate the country's governance structure (Table 3.6). Dunn and Hamilton et al (2008) indicate that in 2005, women were: 12% of Members of Parliament, 18% of Cabinet Members and 24% of Senators. At local government level women were 7% of Mayors; 7% of Deputy Mayors and 16% of Councilors, although the current Minister of Justice Attorney General and Director of Public Prosecution are all women. Lower female representation in governance structures at the highest levels of decision-making also mean that women have less ability to impact policy and legislative changes to promote gender equality.

**Table 3.6 MALE-FEMALE REPRESENTATION IN NATIONAL GOVERNMENT 2005**

| Categories | Total | Male | | Female | |
|---|---|---|---|---|---|
| | # | # | % | # | % |
| **MPs** | 60 | 53 | 88 | 7 | 12 |
| **Cabinet** | 17 | 14 | 83 | 3 | 17 |
| **Senators** | 21 | 16 | 76 | 5 | 24 |

*Source: Jamaica People Vol. 10 No 2 (2008) PIOJ.*

### *3.3.2 Sex Composition of Boards 2007*

Gender inequality is also reflected in the composition of Boards and Committees in public and private sectors. Results of a study of 40 organizations conducted by the Women's Resource and Outreach Centre (WROC) in 2008 indicate that women represented only 29% of members of Boards in the private and public sectors and in trades unions (Table 3.7). Their participation in the public sector was slightly higher than in trade unions and was lowest in the private sector.

**Table 3.7 SEX COMPOSITION OF BOARDS IN THE OVERALL SAMPLE 2007**

| Type of Organization | Male | Female | Total | % Female |
|---|---|---|---|---|
| Public Sector | 143 | 69 | 212 | 33 |
| Private Sector | 58 | 11 | 69 | 16 |
| Trade Union | 7 | 3 | 10 | 30 |
| Total | **208** | **83** | **291** | **29** |

*Source: Gender and Governance: WROC 2008:24*

These results represent a slight improvement when compared with 2000 data reported in the ***Jamaica Human Development Report 2000:*** men and women comprised 88 % and 12% respectively of Board members of selected interest groups such as the Jamaica Manufacturers' Association, Jamaica Employers Federation, Private Sector Organization of Jamaica, Jamaica Exporters' Association and Jamaica Agricultural Society. Among men and women in executive positions in selected Jamaican business firms, men and women accounted for 49% and 51% respectively. Women dominated personnel, insurance, bank managers and senior administrative personnel. In the leadership of professional organizations, men and women were 59% and 41% respectively. This included Junior Doctors, Chartered Accountants, the Bar Association, the Medical Association and Professional Secretaries. Trade Unions also reflected a similar pattern: In 14 unions, women had the following positions: president (1); and general secretaries (3). Board members were 61% male and 39% female.

Overall, the data showed more women in middle level leadership positions and men dominating in top leadership positions.

## 3.4. Government Expenditure: Profile of the 2007 Budget

This section of the report provides an overview of budget as an indication of the availability of resources for human security and development. Table 3.8 below shows that government expenditure for the Fiscal Year 2007/2008 totaled just over $380 million, with the majority of the expenditure (53.8%) directed towards public debt management.

**Table 3.8 RECURRENT AND CAPITAL GOVERNMENT EXPENDITURE FY 2007/2008 ($ Million)**

| | 2007/08 [e] Total Expenditure | 2007/08 [e] % Share* |
|---|---|---|
| **A. GENERAL SERVICES** | **263,357.7** | **69.2** |
| **1 General Administration** | **232,316.1** | **61.1** |
| State Ser vices | 1,247.3 | 0.3 |
| Public Debt Management | 204,675.3 | 53.8 |
| Foreign Services | 2,357.5 | 0.6 |
| Personnel Administration | 2,355.1 | 0.6 |
| Economic & Fiscal Management | 6,398.5 | 1.7 |
| Other Gen eral Services | 15,282.4 | 4.0 |
| **2 Security Services** | **31,041.6** | **8.2** |
| De fence | 5,369.5 | 1.4 |
| Justice | 2,958.4 | 0.8 |
| Police | 19,885.0 | 5.2 |
| Correctional Ser vices | 2,828.7 | 0.7 |
| Total Security Services | 31,041.6 | 8.2 |
| **B. SOCIAL AND COMMUNITY SERVICES** | **80,043.5** | **21.0** |
| 1 Education and Cultural Development | 47,684.5 | 12.5 |
| 2 Health | 19,889.0 | 5.2 |
| 3 Social Security and General Welfare | 3,714.7 | 1.0 |
| 4 Housing | 295.3 | 0.1 |
| 5 Water Supplies | 2,227.2 | 0.6 |
| 6 Information and Broadcasting | 473.0 | 0.1 |
| 7 Other Social and Community Services | 5,759.8 | 1.5 |
| **C. ECONOMIC SERVICES** | **40,290.7** | **10.6** |
| 1 Agriculture | 5,544.9 | 1.5 |
| 2 Industry and Commerce | 1,737.0 | 0.5 |
| 3 Trans port and Communication | 3,920.6 | 1.0 |
| 4 Roads | 15,134.8 | 4.0 |
| 5 Fuel and Power | 276.0 | 0.1 |
| 6 Environmental Protection | 561.9 | 0.1 |
| 7 Other Economic Ser vices | 13,115.5 | 3.4 |
| **D. MISCELLANEOUS SERVICES** | **0.0** | **0.0** |
| **GROSS TO TAL** | **383,691.9** | |
| Less Appropriation-in-Aid | 3,326.9 | |
| **NET TO TAL** | **380,365.0** | **100.0** |

* of Net Total e – estimated r - revised

Source: Ministry of Finance and the Public Service. Taken from Economic and Social Survey, Jamaica 2007.

The table shows that debt servicing accounted for the largest portion (54%) of the overall budget. Social and Community Services accounted for just over 21% (See

Table 3.8). More than half of this budget was allocated for 'Education and Cultural Development' (13%); 'Health' was allocated 5%. and 'Social Security and General Welfare' was 1.0% of the budget. **Any loss of revenue is likely to result in a reduction in the 21% currently spent on Social and Community Services.**

## 3.5. Government Revenue: Profile of the 2007 Budget

Jamaica's government revenue for 2007 totalled approximately $240 million (Table 3.9) with tax revenue (90%) accounting for the majority of overall government revenue. Tax revenue from 'International Trade' contributed a 25% share to government revenue, while 'Production and Consumption' represented 27%.

In a previous study (Stevens, Kennan and Meyn, 2009), the annual revenue loss to Jamaica as a result of the EPA over the entire implementation period (i.e. until 2033) was estimated to be €27 million[32] or J$2.97 billion,[33] with 1% (approx. €270,000.00 or J$29,700,000.00) of that loss occurring between 2011 to 2013.[34]

As such, reductions in tariffs are likely to result in increased taxation and as previously indicated a reduction in spending on social services. This will impact negatively on health, education, welfare services, and poverty reduction programmes which will affect the poorest and most vulnerable. In response, the government could reverse pro-poor policies such as the elimination of tuition fees in schools, and rescind the free health care policy introduced in 2008. The concern is particularly acute as climate change has resulted in rising sea levels in some coastal areas. This has resulted in damaged roads, more frequent flooding and more intense hurricanes and tropical storms. The damage has required considerable expenditure to repair roads and other infrastructure. For example, the preliminary cost of damage and losses caused by Hurricane Dean in 2007 was US$329.3 million. (J$23.0 billion), half of which was infrastructure. The government was forced to find this unbudgeted expenditure to effect repairs.

Another likely effect of reduced government revenue is the possibility of layoffs in the public service which is female dominated. With reduced revenue the government may increase tax on the private sector, however only 30% reportedly pays. The tax debt will have a greater negative impact on employment, resulting in layoffs and an increase in the price of products. Single female headed households are likely to be very adversely impacted. Tax reforms may be introduced to replace lost revenue by increasing tax on corporations.

**Table 3.9 GOVERNMENT REVENUE FOR THE FISCAL YEAR 2007/2008**

| | J$ Million | | Revenue as % of Total Government Revenue | |
|---|---|---|---|---|
| | 2007/2008P | FY2007/08 Bud get | 2007/2008P | FY2007/08 Bud get |
| **TO TAL REV E NUE** | **194,847.7** | **239,801.5** | **100.0** | **100.0** |
| **i) TAX REV E NUE** | **175,271.7** | **217,630.2** | **90.0** | **90.8** |

[32] Actual figure in study is €26,845,000.
[33] Using the current exchange rate of €1 = J$110.
[34] The annual revenue loss was estimated based on i) average import values 2004-2006 ii)2009 tariffs of items which will be duty free in 2013, iii) 2009 tariffs of all items being liberalized. This approach excludes specific duties, (Stevens, Kennan and Meyn, 2009).

| | | | | |
|---|---|---|---|---|
| **Income and Profits** | **70,842.8** | **88,941.8** | **36.4** | **37.1** |
| Bauxite/Alumina | 726.7 | 1,499.1 | 0.4 | 0.6 |
| Other Companies | 11,582.1 | 18,091.6 | 5.9 | 7.5 |
| PAYE | 38,936.6 | 45,661.0 | 20.0 | 19.0 |
| Tax on Dividend | 1,920.5 | 233.4 | 1.0 | 0.1 |
| Other Individuals | 1,583.6 | 2,416.8 | 0.8 | 1.0 |
| Tax on Interest | 16,093.3 | 21,039.8 | 8.3 | 8.8 |
| **Environmental Levy** | **1,295.3** | **1,200.0** | **0.7** | **0.5** |
| **Production and Consumption** | **53,031.4** | **65,570.9** | **27.2** | **27.3** |
| SCT | 3,147.3 | 4,818.7 | 1.6 | 2.0 |
| Motor Vehicle Li censes | 852.0 | 1,055.5 | 0.4 | 0.4 |
| Other Li censes | 265.6 | 302.6 | 0.1 | 0.1 |
| Betting, Gaming and Lottery | 1,002.0 | 1,214.2 | 0.5 | 0.5 |
| Ed u cat ion Tax | 8,290.9 | 9,977.0 | 4.3 | 4.2 |
| Contractors Levy | 710.1 | 898.4 | 0.4 | 0.4 |
| GCT(Local) | 30,718.7 | 37,866.4 | 15.8 | 15.8 |
| Stamp Duty(Local) | 8,044.7 | 9,438.0 | 4.1 | 3.9 |
| **International Trade** | **50,102.1** | **61,917.6** | **25.7** | **25.8** |
| Customs Duty | 15,717.6 | 19,166.3 | 8.1 | 8.0 |
| Stamp Duty | 952.6 | 1,281.2 | 0.5 | 0.5 |
| Travel Tax | 1,795.9 | 2,285.8 | 0.9 | 1.0 |
| GCT(Imports) | 24,518.0 | 28,225.7 | 12.6 | 11.8 |
| SCT (Imports) | 7,118.0 | 10,958.6 | 3.7 | 4.6 |
| | | | | |
| ii) NON-TAX REV E NUE | 11,594.7 | 14,340.6 | 6.0 | 6.0 |
| | | | | |
| iii) BAUX ITE LEVY | 4,300.5 | 4,268.2 | 2.2 | 1.8 |
| | | | | |
| iv) CAP I TAL REV E NUE | 3,680.8 | 3,562.4 | 1.9 | 1.5 |

p - data includes actual figures for April –January 2007/08
Source: Ministry of Finance and the Public Ser vice
*Taken from Economic and Social Survey Jamaica, 2007.*

The Jamaican government would need to restructure the country's trade tax regime as a result of reduced revenue from the EPA. They may opt for consumption taxes to meet any shortfall as the current tax structure does not facilitate the collection of taxes from all income earners and companies. This will have a differential gender impact as there is the likelihood that the cost of basic items such as food, medicines and transportation costs may be increased. This action would place a heavier burden on single female heads of households already a vulnerable group. Their children would also be at risk jeopardizing the future development of younger persons and limiting the country's capacity to achieve developed country status and sustainable. The rising cost of oil globally will impact the distributive sector and the cost of living as Jamaica is a non-producing oil country. At another level tax reforms will need to find ways of including a broader range of workers who may be employed in the EU for less than 12 months. A system will be needed to track these workers to maximize revenue from taxes.

**Summary**

The analysis exposed the vulnerability of the country and poor women in particular in coping with current and emerging challenges associated with globalisation and trade including the EPA. Among these were:

- Higher female participation in education is likely to give them advantages over men for some types of jobs available through the EPA.
- Gender biases in the education and training system are however likely to reinforce rather than transform gender stereotyping that could equip young women and men to take advantage of emerging employment opportunities linked to the EPA. In the absence of these changes, women are likely to continue receiving lower wages.
- Lower male participation in formal education and the absence of certification is likely to limit male eligibility for employment in some of the emerging job opportunities;
- The feminization of poverty characterized by high levels of female headed households in the poorest quintile with larger numbers of persons and lower levels of consumption; higher poverty in rural areas. The feminization of poverty was also linked to women's disproportionate involvement in the care economy and unpaid work, and part-time work.
- Some poverty alleviation support from the PATH programme and remittances from overseas to address women's practical needs but the economic crisis limiting the reliability of income and survival for single female headed households.
- Discrimination in the gender system which challenge women's ability to meet their strategic needs to access power at the highest levels of decision-making in politics and management.
- The limitations that Jamaica's high debt burden (over 50% of revenue) places on the country to address systemic gender inequalities and prepare for the challenges of the EPA.
- Reduced tariff revenue from trade liberalization (estimated at 1% of GDP) is likely to limit government's ability to provide basic social services (health education etc). Single female headed households, rural households and other vulnerable groups are most likely to feel the impact. Layoffs in the public sector will also impact females more as they are the majority of the public sector work force.

# 4. Gender impact of the EPA on Major Sectors

This section of the report presents the timelines for trade liberalization and the tariff rates on the various lines to be liberalized in each of the timeframes indicated.

## 4.1. EPA Analysis of Goods Producing Sector: Jamaica's Imports

To analyze the treatment of any gender-sensitive products in the EPA, a review was first done of Jamaica's market access commitments as highlighted in the Tariff Liberalization Schedule, and the main components of the EPA Schedule were then examined. The Tariff Liberalization Schedule shows four distinct timelines for trade liberalization:

- Immediate Tranche - Goods scheduled for immediate liberalization i.e. January 1, 2009
- Mid-Term Tranche - Goods scheduled for liberalization over the periods of 2011-18, 2011-23 & 2013-23
- Long-Term Tranche- Goods scheduled for liberalization over the periods of 2011-28, 2011-33 & 2013-33
- Excluded Tranche - Goods excluded from the EPA tariff liberalization schedule[35]

### *4.1.1 General Overview of EPA Tariff Liberalization Schedule*

*Immediate Tranche (2009)*

Table 4.1 provides an overview of Jamaica's EPA Market Access Schedule which shows that there are 5,577 lines and of these, 3,734 lines (67%) are scheduled for liberalization in 2009.

**Table 4.1 SUMMARY OF JAMAICA'S MARKET ACCESS SCHEDULE**

| | **# Lines** | **Import Value (Average, 2004–6)** [a] | | **Base Tariff** [b] **(%)** | | | |
|---|---|---|---|---|---|---|---|
| **Goods to be Liberalized** | | *€000* | *Share of total* | *Min.* | *Max.* | *Simple average* [c] | *Trade-weighted average* [c] |
| **Total trade in HS 1–97** | | **361,915** | **100%** | | | | |
| 2009 | 3,734 | 239,793 | 66.3% | 0 | 40.83 | 2.1 | 0.02 |
| 2011–13 | 5 | 1,677 | 0.5% | 0 | 15 | 15.0 | 15.0 |
| 2011–18 | 141 | 1,677 | 0.5% | 0 | 40 | 13.1 | 9.5 |
| 2011–23 | 991 | 61,342 | 16.9% | 0 | 40 | 19.1 | 20.2 |
| 2013–23 | 2 | - | 0.0% | 5 | 5 | 5.0 | 0 |
| 2011–28 | 154 | 7,478 | 2.1% | 0 | 40.83 | 27.3 | 18.5 |
| 2013–28 | 5 | 632 | 0.2% | 0 | 5 | 1.0 | 5.0 |
| 2011–33 | 88 | 9,836 | 2.7% | 0 | 40 | 31.2 | 8.0 |
| 2013–33 | 1 | 62 | 0.0% | 5 | 5 | 5.0 | 5.0 |
| **Excluded goods:** | 456 | 38,299 | 10.6% | 0 | 100 | 28.7 | 23.9 |
| **Totals** [d] | **5,577** | **360,797** | **99.7%** | | | | |

*Notes*:
(a) No import data provided with market access schedule. Data from Eurostat's COMEXT database on average EU27 exports 2004-6 have been used (http://epp.eurostat.ec.europa.eu/newxtweb/mainxtnet.do).
(b) 2006 MFN tariffs, obtained from UNCTAD's TRAINS database. The rate for eight items is missing.
(c) Calculated on the maximum applicable *ad valorem* tariffs.
(d) Difference from 'Total trade' figure is accounted for by goods in HS Chapter 93, which is not included in the EPA.
*Source: Overseas Development Institute.*

[35] NB: Excluded goods are those that will not be liberalized under the EPA *but will retain their tariff rates under other existing agreements or arrangements*. Under the EPA, any high 'non-tariff trade taxes' on excluded items will have to be removed within ten (10) years. This is likely to have implications for CARICOM's intra-regional trade. CARICOM-approved restrictions on intra-regional imports may have to be adjusted to be synchronized with EPA commitments. This is especially the case where a CARIFORUM state is a major competitor with local producers.

Table 4.2 presents a breakdown of tariffs for goods scheduled for liberalization. It shows that approximately 90% of the goods (3,319 lines) scheduled for immediate liberalization in 2009, currently attract zero duties. It also shows that the tariff rates on those goods that currently attract duties are low (averaging 2.1%), even though 5.7% of the items attract a maximum tariff rate of 20% and higher.

Duties in the immediate tranche are as follows : i) 1.1% attract a maximum tariff of 5% ii) 4.3% attract a maximum tariff greater than 5% & less than or equal to 15% and iii) 5.7% of the lines attract a maximum tariff of 20% and higher.[36] The immediate impact of the EPA may therefore be negligible as the majority of the goods scheduled to be liberalized in 2009 are already duty free and the tariffs on those attracting duties are mostly low.

**Table 4.2 BREAKDOWN OF TARIFF RATES FOR GOODS SCHEDULED FOR LIBERALIZATION IN 2009**

| Tariff Rate (%) | | Number of Lines | % of Lines |
|---|---|---|---|
| **Min** | **Max** | | |
| 0 | 0 | 3319 | 88.9 |
| 0 | 5 | 1 | 0.0 |
| 0 | 10 | 75 | 2.0 |
| 0 | 15 | 86 | 2.3 |
| 0 | 20 | 117 | 3.1 |
| 0 | 25 | 15 | 0.4 |
| 0 | 30 | 4 | 0.1 |
| 0 | 40 | 67 | 1.8 |
| 0 | 40.83 | 2 | 0.1 |
| 5 | 5 | 39 | 1.0 |
| 5 | 20 | 2 | 0.1 |
| 20 | 20 | 1 | 0.0 |
| Unavailable/Missing Rate | | 6 | 0.2 |
| **TOTAL** | | **3734** | **100.0** |

***Source: Overseas Development Institute.***

*Mid-Term Tranche (2011-18, 2011-23 & 2013-23)*
During the mid-term period, 1,139 goods (20.4% of the lines) are scheduled to be liberalized.

*Long-Term Tranche (2011-28, 2011-33 & 2013-33)*
During the long term tranche, the remaining 248 goods (4.4% of the lines) are to be liberalized.

*Excluded Tranche*
Table 4.3 shows that 456 goods (8.2% of the lines) are excluded from the EPA liberalization schedule: 65% of these are agricultural and manufactured food products. Mining sector products are not excluded from the EPA liberalization schedule.

**Table 4.3. BROAD COMPOSITION OF JAMAICA'S LIST OF EXCLUSIONS**

| HS Section | Description | Share of Total Excluded Lines |
|---|---|---|
| I | Live animals; animal products | 28.9% |
| II | Vegetable products | 13.2% |

[36] This includes 2.0% of the lines with a maximum tariff rate of 40% and higher.

| | | |
|---|---|---|
| III | Animal or vegetable fats/oils | 2.2% |
| IV | Prepared foodstuffs; beverages; tobacco | 22.1% |
| VI | Chemical products | 9.0% |
| VII | Plastics/rubber & articles | 0.7% |
| IX | Wood & articles | 1.3% |
| X | Woodpulp/paper & articles | 2.4% |
| XI | Textiles & clothing | 8.8% |
| XIII | Articles of stone, plaster, ceramics, glass, etc. | 0.2% |
| XIV | Precious/semi-precious stones/metals & articles | 0.2% |
| XV | Base metals & articles | 2.9% |
| XVI | Machinery & mechanical appliances | 3.1% |
| XX | Misc. manufactured articles | 5.0% |

*Note*:
There are no exclusions in HS Sections V (mineral products), VIII (hides/ leather & articles), XII (footwear, headwear, umbrellas, etc.), XVII (vehicles/ aircraft/vessels & associated transport equipment), or XVIII (photographic/ precision/medical/surgical etc. instruments). Section XIX (arms& ammunition) is not included in the EPA.

***Source: Overseas Development Institute.***

### *4.1.2 Overview of Gender-Sensitive Products Identified in the EPA Liberalization Schedule*

Criteria were developed to identify gender–sensitive products. The criteria included an assessment of how males and females would be affected as consumers and as producers of goods under the EPA. Questions used to develop the criteria are outlined below.

**The Consumer Perspective**
The relevant questions therefore were:

- What are the products most commonly consumed in the Jamaican household and diet and how are they used especially by the poorest groups in the population?
- What are the gender characteristics of consumption across various income groups?
- What is the sex of the household member most likely to purchase and use these products?
- What might the gendered characteristics of consumption therefore be?

The criteria were guided by the fact that most products consumed in the household are purchased and used by women because of their gender roles in the household, which include cooking and caring for the family.

***Products Consumed:*** The products most commonly consumed in the average Jamaican household were identified using the Consumer Price Index (CPI).[37] The CPI is a reliable source to estimate how cheaper imported goods from Europe is likely to impact consumption in poor households, as it uses data from the Household Expenditure Survey (HES) which measures the cost and content of a basket of goods used by the typical consumer. This is a

[37] The CPI is designed to measure price changes for a fixed basket of goods and services and is compiled from a specified basket of goods and services purchased by the population. Data is collected using The Household Expenditure Survey (HES) which identifies those items that are important in the consumption pattern of Jamaican households. The data on consumption patterns presented here are from the HES fielded between June 2004 and March 2005. The weights were also derived from the HES 2004/5 and form the basis of the fixed weights used throughout the life of the index. New weights were updated to December 2006 and are presented in the accompanying table. Two distinct expenditure groups were identified by the HES 2004/5, the upper income group which consists of 15% of the population and **the low/middle income group which represents the remaining 85%. The CPI reflects the expenditure of the low/middle income consumers.** Patterns of expenditure are shown for all of Jamaica as well as categorized by regions (See Table). *Source: Consumer Price Index Revised Series January to July 2007 (Statistical Institute of Jamaica).*

basic indication of consumption patterns in poor households. The basket includes food and non-food products. The importance of these products is guided by the level of expenditure on specific groups of products in the CPI basket of goods. The analysis showed that the largest area of expenditure was on **food** (35% as indicated in Appendix K.1). The most heavily weighted food groups were: '*Meat'* (7%), *'Vegetables and Starchy Foods'* (7%), as well as *'Bread and Cereals'* (6%). Further analysis of these three food categories showed that in *'Meat'*, poultry represented about 62% of the various meat kinds and pork (various cuts) accounted for almost 8%. The main 'Vegetables *and Starchy Foods'* were: carrots (11%) and cabbage (11%). The main starches were: yam (32%); potato (Irish & Sweet variety) (30%); banana (16%) and plantain (green & ripe variety), (17%). The main 'Breads and Cereals' were: bread (various kinds) (25%); rice (white variety) (20%); and flour (15%). As previously noted, the basket includes imported as well as locally produced goods. Commonly used rice, flour and chicken neck and back are imported and are therefore sensitive to price fluctuations associated with currency devaluation.

Other common food groups in the Jamaican diet were: 'Fruits' with citrus and oranges, grapefruits and limes accounting for 25% and ripe bananas accounting for 25% (See Appendix K.6). Other important food items included were: *'Milk, Cheese and Eggs' (*animal dairy products such as milk and cheese which accounted for 80%) (Appendix K.5); and '*Oils and Fats' (*butter and margarine accounted for 32%) (Appendix K.7).

The products most commonly used are consumed for breakfast, lunch or dinner. Lower income households including those headed by single females) consume mainly chicken neck and back as the main source of protein (lower cost) as well as ground provisions. Pork is commonly consumed in popular food favourites such as 'jerk pork' and 'pigs tail' (See Appendix K.2). Data in Appendix K.4 also shows that bread, rice and flour are core elements of the Jamaican diet. Bread, a staple, is consumed daily. Hardough Bread comprises 18% of the *'Bread and Cereals'* category for the Rural Areas as compared to 14% in the Greater Kingston Metropolitan Area.[38] Rice is also consumed daily in the traditional meal of stew peas (with red beans) and rice, or simply as rice and peas (beans). Flour is used to make dumplings, which can be consumed at either breakfast, lunch or dinner-especially among poor families. Other items relevant to the Jamaican diet include: vegetables, fruits, and animal products such as milk, cheese, and butter and these are imported. Together these products provide the ingredients for many local dishes. The level of consumption of these food items varies across class and rural urban population groups. Access to and consumption of many basic products is influenced by levels of income and many poor households may therefore be unable to afford these products regularly. Some goods in the CPI are produced locally while others are imported (e.g. staples like rice and flour heavily consumed by poor Jamaicans). Some locally produced goods have foreign inputs (e.g. fertilizers for agricultural products), but that level of analysis was constrained by the unavailability of microdata. *Research is therefore needed to collect microdata on the content of goods imported for the productive sector as well as food consumed by ordinary Jamaicans as some processed foods use imported ingredients.*

***Gender Characteristics of Consumption:*** Food staples in the CPI were then selected as gender-sensitive products for further analysis, given their importance to the household diet and because women have major responsibility for their purchase, preparation, and consumption. Changes in the price of basic food and non-food items in the CPI that are

[38] In examining the distribution of poverty across regions in Jamaica, it is important to note that *'Rural Areas'* accounted for **65.7% of poverty in Jamaica as compared to 21.2%** in the *Kingston Metropolitan Area* and 13.1% in *Other Towns* (Jamaica Survey of Living Conditions 2006).

likely to be impacted by trade liberalization, will have a negative impact on the poorest households which are headed by women. Earlier analysis showed that almost half of all Jamaican households (47%)**,** are headed by single females and these households are clustered in the poorest quintiles (See Appendix K.8). The distribution effects will therefore vary across income groups.

The EPA schedule was reviewed and items on the CPI were identified using the descriptions of each item in the schedule to ensure that the specific type of product was correctly selected as a gender-sensitive product (e.g. *processed cheese* vs. *fresh cheese).* Detailed descriptions for each of these products are provided in Section 4.1.3.

**The Producer Perspective**

Questions to identify gender-sensitive products from the producer perspective were guided by the fact that some goods produced locally are destined for either the domestic or export markets. Many producers are likely to be impacted directly or indirectly by competition from EU imports. The relevant questions were:

- What is the gender composition of the labour force in the goods producing sectors?
- Which product sectors and sub-sectors to be impacted by the EPA have a large composition of female employment (i.e. higher than 50%)?

***Gender Composition of the Labour Force in the Goods Producing Sector:*** Efforts were made to determine the gender composition[39] of the labour force related to the production of goods produced across various sectors and this was done using data from the relevant statistical bodies.[40] The aim was to identify those sectors likely to be adversely affected by the removal of tariffs on certain products. Cheaper imports will mean that workers employed in local industries producing the same item may be displaced resulting in lower levels of production and reduced employment. This will affect households. Section 4.1.4 provides an analysis of the likely impact of competition on specific products.

Lower levels of employment, will adversely affect purchasing power and household consumption. Changes in tariff structures will determine costs and benefits to groups of men and women. Male and female-headed households are likely to be impacted differently, with single female headed households being the most vulnerable to increased poverty.

***Gender Composition of the Employed Labour Force in the Goods Producing Sector*:** Analysis of data on the employed labour force shows that there is a sexual division of labour across sectors and industries. Males dominate the good producing sector and females dominate the services sector. Analysis of the *Goods Producing sector, shows that* in *Agriculture, 80% of the workers* are males; [41] in *Mining* 87% are males and in *Manufacturing* 72.3% are males *(See* Appendix B.2).

The conclusion from this analysis indicates that overall, males stand to be greatly impacted by any changes in agriculture, mining and/or manufacturing production. However, further examination of the gender distribution of workers in these sectors must be undertaken.

[39] There is a sexual division of labour in the production of agricultural crops. Some crops are produced solely for local consumption and others are produced exclusively for export.
[40] Statistical data on labour were collected from various institutions: the Planning Institute of Jamaica, the Statistical Institute of Jamaica. Unpublished data on labour for specific crops were also collected from agencies of the Ministry of Agriculture, and Industry Associations etc.
[41] In the employed labour force, agriculture accounted for 51.2% of male workers and 13.8%, of female workers (Table 2.9).

***Agriculture:*** This sector is male-dominated. Data from the World Bank report 9% of women employed in agriculture compared to 25% of men. Data from RADA provide an indication of the sex distribution of **registered farmers** producing selected agricultural crops. In terms of their importance to employment, the main agricultural crops are cabbage, carrot, pumpkin, cocoa, potato, tomato, banana, plantain and yam (Appendix J.1).[42] Each of these crops has between 10,000 and 30,000 persons involved in active production. Males account for no less than 60% of the registered farmers producing each crop (See Table 4.4). This confirms that agriculture is still male-dominated.

*Employment of Rural Women in Agriculture*

Rural women involved in agriculture, produce several agricultural crops and raise small livestock, but are vulnerable at several levels. The 2007 agricultural census does not in the main provide sex disaggregated data on their activities. It does however, confirm that of the 210,853 individual land holders, 139,965 (66%) are males and 63,690 are females (30%). The sex of the remaining persons was not specified.

The data in Table 4.4 confirm that women are involved in subsistence farming in Jamaica. To determine the gendered importance of particular agricultural crops, nine (9) major crops[43] produced by both males and females were examined. Specifically, the number of female farmers involved in farming these crops was analyzed as a share of total female farmers and were similarly compared with their male counterparts (See Appendix J.1). The analysis showed that the share of female farmers in five (5) of the nine (9) crops was higher in comparison to the share of male farmers producing those same crops. The crops identified were: *cabbage, carrot, potato (all types), tomato and yam* (See Appendix J.1). For agricultural products, there is likely to be a differential impact on male and female farmers to the extent that the EPA tariff liberalization affects the relative changes in prices, production costs and income. Males are expected to be harder hit than females as they account for the majority of workers farming these crops. However, female farmers engaged in producing the five identified crops are also likely to be negatively impacted.

**Table 4.4 PERCENTAGE (%) OF REGISTERED FARMERS* BY CROP AND GENDER 2008**[44]

| Crop | Male | Female |
|---|---|---|
| Cabbage | 70.6 | 29.4 |
| Carrot | 68.4 | 31.6 |
| Cassava | 79.4 | 20.6 |
| Coffee | 75.9 | 24.1 |
| Beans (Broad, String, Sugar) | 61.6 | 38.4 |
| Melons | 80.6 | 19.4 |
| Onion | 74.6 | 25.4 |
| Pumpkin | 76.4 | 23.6 |
| Cocoa | 79.4 | 20.6 |
| Potato (all types) | 74.9 | 25.1 |
| Rice | 75.0 | 25.0 |

[42] Table 4.4 presents data from the ABIS Farmer Registration Database provided by the Rural Agricultural Development Authority (RADA, 2008).
[43] The main crops with large numbers of workers are cabbage, carrot, pumpkin, cocoa, potato, tomato, banana, plantain and yam.
[44] Data from the latest Agricultural census was not yet available when the study was being conducted. In the absence of sex-disaggregated data on employment in specific agricultural crops the data from RADA's ABIS Farmer Registration Database was used as a proxy but this does not capture all farmers, as registration is voluntary.

| | | |
|---|---|---|
| Tomatoes | 73.9 | 26.1 |
| Banana | 76.9 | 23.1 |
| Pimento | 79.8 | 20.2 |
| Dasheen | 77.1 | 22.9 |
| Other Legumes | 60.0 | 40.0 |
| Other Tubers | 75.9 | 24.1 |
| Plantain | 80.7 | 19.3 |
| Papaya | 81.3 | 18.7 |
| Yam | 74.9 | 25.1 |
| Sugarcane | 82.3 | 17.7 |
| Oranges | 78.0 | 22.0 |
| Ortanique | 72.6 | 27.4 |
| Grapefruit | 71.9 | 28.1 |
| Lime | 70.3 | 29.7 |
| **TOTAL** | **75.7** | **24.3** |

*Source: Rural Agricultural Development Authority, ABIS Farmer Registration Database.2008*

* Farmers registered with the Rural Agricultural Development Authority (RADA) in the Agricultural Business Information System (ABIS). Note: ABIS is a web based information system developed by RADA to provide information on crops, livestock and agricultural production, markets and stakeholders to support the business of agriculture.

Women are also involved in *animal rearing* on a small scale and focus primarily on poultry and pigs to a lesser extent. Some of this is consumed at the household level. Wyss and White (2004) note that "women accounted for more than half of all poultry workers in 1993 and 2001 (while they accounted for only between 20 and 24 percent of all agricultural workers)". Poultry production they note, grew from being the fifth largest to the third largest category of agricultural work for women between 1993 and 2001 (Wyss and White, 2004). The reasons given were related to low start-up costs which women find attractive given their difficulty in accessing loans for farming operations. There is also the convenience of farming in one's backyard which enables women to easily combine this work with their household responsibilities (Wyss and White, 2004).

The Rural Agricultural Development Agency (RADA) of the Ministry of Agriculture provides *technical assistance* to rural women to address several gender inequalities faced by this group, who are particularly vulnerable to poverty.[45] The 2006 Jamaica Survey of Living Conditions (2007) notes that: rural poverty accounted for *66% of total poverty* island wide; the national incidence of poverty was 14%; poverty in Rural Areas was 20%, compared to 9% in the Kingston Metropolitan Area (KMA) and 9% in Other Towns. Some 77% of the Total Consumption of Rural Households consisted of Food (49%) and Transportation (28%). Overall there is a gender gap in household consumption expenditure such that female headed households consume 81% of the amount consumed in male-headed households.

Several gender issues impact on rural women which will affect their development. Innerarity (2000) points to the Women Food Producers Study (1993) which highlights several inequalities: women's smaller land holdings (1.10 hectares compared to 1.98 hectares for males), which limited their access to capital and credit, technology and training. They, like male farmers were also adversely affected by poor rural infrastructure (roads, irrigation, marketing distribution networks). Rural women also had lower levels of technical knowledge

[45] Jamaica's fifth report to CEDAW (2004) indicates that the Social Services/Home Economics programme promotes agriculture, home economics and micro enterprise development.(p74).

and there was minimal technology transfer to enhance productivity. Most women farmers relied on hand tools versus motorized mechanical equipment. Several tools were hazardous to women's health e.g. hand forks and pick axes which required heavy physical force for pushing, lifting, and dragging which was especially difficult for pregnant women. Post-harvest handling was inefficient with heavy dependence on traditional and indigenous technologies. Transportation to market their goods was also a major challenge with heavy dependence on trucks, pick-ups vans and passenger buses to transport themselves and their perishable goods to the market. As an example of this precarious situation, it should be noted that in December 2008, 14 persons were killed (8 women, 5 men and one child), en route from the rural parish of Portland to the main market in Kingston. The truck transporting them and their market produce, overturned in a ravine (*'Portland Tragedy: 14 Killed in Market Truck Plunge'*- Jamaica Observer, December 21, 2008).

Innerarity also notes the unequal participation of women in farmers' organizations (2%) and community groups (8%) which would enable them to access more benefits. Most were involved in church groups (62%) and PTAs (32%). Jamaica's report to CEDAW (2004) however notes the development of organisations of rural women such as the Jamaica Network of Rural Women Producers (JNRWP) launched in 1999 with support from the Inter-American Institute for Cooperation in Agriculture (IICA); JNRWP is a member of the Caribbean Network of Rural Women Producers. Respondents in the Women Food Producers Survey identified their main problems as: inadequate labour (61%); lack of financing (57%); and gender discrimination (7%).

Given the high vulnerability of rural women to poverty, their unequal position in agricultural labour market, and the barriers they face to productivity, programmes supporting their development will need to be expanded. A higher proportion of rural households are male-headed. This means that a reduction in income resulting from imports will also impact negatively on rural women who have limited opportunities to move into other sectors and they are therefore at increased risk of poverty or they may emigrate to urban centres.

The effect of tariff liberalization on crops produced for the domestic market, will depend on whether Jamaica can increase reliable production of its domestic supply at competitive prices to gain control of the domestic market. If Jamaica fails to do this, then it may result in further flooding of the local market by a greater volume of cheaper imported crops, making those local producers uncompetitive and forcing them out of the market.

*Coffee*: Employment in the coffee industry is based on data from the Coffee Industry Board (CIB) which reports that there are over 9,500 registered coffee farmers in Jamaica. They estimate a ten-fold employment effect in field and processing operations indicating that coffee employs approximately 90,000 people. The sexual division of labour in the coffee industry shows that approximately 80% of persons employed are women, most of whom harvest coffee beans at the peak of the crop.

***Manufacturing:*** ESSJ 2007 indicates that employment in the manufacturing sector, which accounted for 6% of the total employed labour force was 69,350 persons. The average number of females employed was 19,150 representing 4% of the total number of females in the labour force and 28% of the total employed labour force in the manufacturing sector. The average number of males involved in the sector was 50,200 persons, 7.7% of males employed in the labour force and 72.4% of the total labour force in the sector. (ESSJ 2007: 12.5). The Textiles and Apparel industry in Jamaica is dominated by females, who work in the free trade zones. In 1992, female employment as a percentage of total employment in export processing manufacturing was 82%.[46] Employment in EPZs peaked at 36,000 women in 1995 but NAFTA resulted in the loss of 12.400 jobs to women between 1993 and 2001. The US State Department notes that “Free trade zones have stimulated investment in garment assembly, light manufacturing, and data entry by foreign firms. However, over the last 5 years, the garment industry has suffered from reduced export earnings, continued factory closures, and rising unemployment. This can be attributed to intense international and regional competition, exacerbated by the high costs of operations in Jamaica, including security costs to deter drug activity, as well as the relatively high cost of labor. “ [47]

The production of rum, beer and cement (See Table 2.18) are also important components of the local manufacturing industry.

***Mining:*** Production in the mining sector includes: alumina/bauxite, limestone, sand & gravel, marl and fill and gypsum (See Table 2.15 & 2.17). The industry is male-dominated (90%) (See Appendix B.2). A review of the membership of the Mining and Quarrying Association, confirms this trend as there were 135 male and 15 female members.

**Products and Sectors to be Impacted by the EPA**

Using the gender-sensitive criteria mentioned above and the corresponding data, the following products and product groups were identified for each major economic sector:

**Table 4.5 GENDER SENSITIVE PRODUCTS/PRODUCT GROUPS IDENTIFIED FOR JAMAICA**

| Agriculture | Manufacturing | Mining |
|---|---|---|
| Coffee | Textiles & Apparel | Alumina/Bauxite |
| Banana, Plantain | *Animal Dairy Products:* Milk, Cheese, Butter , etc. | Limestone |
| Papaya | Beer, Rum | Sand & Gravel |
| Spices, Pimento | Flour | Marl & Fill |
| *Ground Provisions :* Yams, Sweet Potatoes , Dasheen | Cornmeal | Gypsum |
| *Vegetables* : Carrot, Cabbage, Pumpkin | Rice | |
| *Citrus:* Oranges, Tangerines, Grapefruits | Poultry & Pork meat | |
| Poultry | Bread | |
| Cattle | Cement | |

### *4.1.3 Specific Treatment of Identified Gender Sensitive Products in EPA Liberalization Schedule*

To assess the specific treatment of the gender-sensitive products identified in the EPA liberalization schedule an examination was done of: i) tariff rates of the products, ii) timelines for liberalization across the four tranches, and where applicable iii) exclusions. This review will form the basis for the subsequent analysis of the gender impact on production and consumption for the Jamaican economy.

*Immediate Tranche*

[46]Women’s EDGE, Global Trade Program (April 2002). *rade Impact Review***.** Report prepared by Sarah Gammage, Helene Jorgensen, Eugenia McGill with Marceline White.

[47] http://www.ifpri.org/themes/gender/Presentation/Trade.ppt #288,4,Trade and poverty alleviation

Fourteen (14) gender-sensitive goods were identified for liberalization in 2009 (See Table 4.6a). However, a review of the existing tariff rates for these products showed that nine (9) of the products presently attract a zero tariff rate. Four (4) of the remaining products attract a tariff rate of 5% and one (1) product has a maximum tariff rate of 10%. This highlights the point previously made that it is difficult to make conclusions about the impact solely by examining the number of goods to be liberalized. A review of the existing tariff rates for the goods being liberalized is also necessary.

The products to be liberalized are identified below by the various sectors:

<u>Agriculture</u>

- **Cocoa:** scheduled for liberalization in 2009 and currently attracts a zero tariff rate. Specific products identified were:
  - Cocoa beans, whole or broken, raw or roasted

<u>Manufacturing</u>:

**Butter:** scheduled for liberalization in 2009 and currently attracts a tariff of 10%. Specific products identified were:

- Butter fat and butter oil

**Cheese:** scheduled for liberalization in 2009 and currently attracts a tariff of 5%. Specific products identified are:

- Fresh cheese "unripened or uncured cheese", incl. whey cheese, and curd
- Grated or Powdered Cheese
- Processed cheese, not grated or powdered
- Blue-Veined Cheese

**Cornmeal:** scheduled for liberalization in 2009 and currently attracts a zero tariff rate. Specific products identified:

- Groats and meal of maize “corn”

**Tobacco:** scheduled for liberalization in 2009 and currently attracts a zero tariff rate. Specific products identified were:

- Tobacco, unstemmed or unstrapped
- Tobacco, partly or wholly stemmed or stripped, otherwise un-manufactured

**Apparel:** scheduled for liberalization in 2009 and currently attracts a zero tariff rate. Specific products identified are:

- Parts of garments or clothing accessories, knitted or crocheted, n.e.s.
- Parts of garments or clothing accessories, of all types of textile materials, n.e.s. (excl. knitted or crocheted)

**Cement:** scheduled for liberalization in 2009 and currently attracts a zero tariff rate. Specific product identified:

- White portland cement, whether or not artificially coloured

<u>Mining</u>

**Sand & Gravel**: scheduled for liberalization in 2009 and currently attracts a zero tariff rate. Specific products identified:

- Silica sands and quartz sands, whether or not coloured
- Pebbles, gravel, broken or crushed stone, for concrete aggregates, for road metalling or for railway or other ballast, shingle and flint, whether or not heat-treated.

**Table 4.6a GENDER-SENSITIVE PRODUCTS SCHEDULED FOR LIBERALIZATION IN IMMEDIATE TRANCHE (2009)**

| Gender-Sensitive Product Group | Code in Schedule | Description | 'Max. MFN (2006) (TRAINS schedule inH2) | | US$ Value of Total Imports[1] | US$ Value of EU Imports[1] |
|---|---|---|---|---|---|---|
| | | | Min. AV | Max. AV | | |
| Animal products – dairy | 04059010 | Butter fat and butter oil | 0 | 10 | 3,058,410.70 | 2,398,114.58 |
| Animal products – dairy | 040610 | fresh cheese "unripened or uncured cheese", incl. whey cheese, and curd | 5 | 5 | 449,743.11 | - |
| Animal products – dairy | 040620 | grated or powdered cheese | 5 | 5 | 788,988.39 | 113,256.00 |
| Animal products – dairy | 040630 | processed cheese, not grated or powdered | 5 | 5 | 2,270,445.27 | 218,620.22 |
| Animal products – dairy | 040640 | blue-veined cheese | 5 | 5 | 16,764.84 | - |
| Cocoa | 180100 | cocoa beans, whole or broken, raw or roasted | 0 | 0 | - | - |
| Tobacco | 240110 | tobacco, unstemmed or unstripped | 0 | 0 | - | - |
| Tobacco | 240120 | tobacco, partly or wholly stemmed or stripped, otherwise unmanufactured | 0 | 0 | 12,195.85 | 4,412.93 |
| Sand & gravel | 250510 | silica sands and quartz sands, whether or not coloured | 0 | 0 | 123,700.08 | - |
| Sand & gravel | 251710 | pebbles, gravel, broken or crushed stone, for concrete aggregates, for road metalling or for railway or other ballast, shingle and flint, whether or not heat-treated | 0 | 0 | 40,933.09 | - |
| Cement | 252321 | white portland cement, whether or not artificially coloured | 0 | 0 | 185,699.69 | 11,186.00 |
| Apparel | 611790 | parts of garments or clothing accessories, knitted or crocheted, n.e.s. | 0 | 0 | 222,571.69 | - |
| Apparel | 621790 | parts of garments or clothing accessories, of all types of textile materials, n.e.s. (excl. knitted or crocheted) | 0 | 0 | 4,289,966.43 | 99,590.28 |
| Cornmeal | 110313 | Groats and meal of maize "corn" | 0 | 0 | 1,172,398.90 | - |

***Source: Overseas Development Institute and STATIN.***
[1]*2004 data on US$ Value of Imports sourced from STATIN.*

*Mid-Term Tranche (2011-18, 2011-23 & 2013-23)*

Over this period, four (4) mining products are scheduled to be liberalized: Limestone, Bauxite, Gypsum and Alumina with tariff rates of 20%, 15%, 25% and 20% respectively (See Table 4.6b). The manufacturing sector is heavily represented in this tranche with thirty-seven (37) products being identified for liberalization with tariff rates of 25 or 35% as at January 1, 2009. There are no gender-sensitive products within the agriculture sector scheduled for liberalization in this tranche.

The products to be liberalized are identified below by the various sectors:

<u>Agriculture</u>
No gender-sensitive products are scheduled for liberalization in this time period.

<u>Manufacturing</u>
**Textiles:** scheduled for liberalization in 2011-23 and as at January 1, 2009 attracts a tariff rate of 25 or 35%. Specific products identified are detailed in Appendix I.1.

**Apparel:** scheduled for liberalization in 2011-23 and as at January 1, 2009 attracts a tariff rate of 25 or 35%. Specific products identified are detailed in Appendix I.1.

<u>Mining</u>
**Limestone:** scheduled for liberalization in 2011-18 and as at January 1, 2009 attracts a tariff rate of 20%. Specific products identified:

- Limestone Flux; ; Limestone And Other Calcareous Stone, Of A Kind Used For The Manufacture Of Lime Or Cement

**Bauxite:** scheduled for liberalization in 2011-18 and as at January 1, 2009 attracts a tariff rate of 15%. Specific products identified:

- Aluminium Ores And Concentrates

**Gypsum:** scheduled for liberalization in 2011-23 and as at January 1, 2009 attracts a tariff rate of 25%. Specific products identified:

- Gypsum; Anhydrite

**Alumina:** scheduled for liberalization in 2011-23 and as at January 1, 2009 attracts a tariff rate of 20. Specific products identified:

- Aluminium Oxide (Excl. Artificial Corundum)

**Table 4.6b GENDER-SENSITIVE PRODUCTS SCHEDULED FOR LIBERALIZATION IN MID-TERM TRANCHE (2011-2023)**

| Gender-Sensitive Product Group | Code in Schedule | Description | TimeLine | Tariff Rate(%) as at 1st Jan. 2009 | US$ Value of Total Imports[1] | US$ Value of EU Imports[1] |
|---|---|---|---|---|---|---|
| Limestone | 252100 | Limestone Flux; Limestone And Other Calcareous Stone, Of A Kind Used For The Manufacture Of Lime Or Cement | 2011-18 | 20 | - | - |
| Bauxite | 260600 | Aluminium Ores And Concentrates | 2011-18 | 15 | - | - |
| Gypsum | 252010 | Gypsum; Anhydrite | 2011-23 | 25 | - | - |
| Alumina | 281820 | Aluminium Oxide (excl.. Artificial Corundum) | 2011-23 | 20 | - | - |
| Textiles** | *See Appendix...* | *See Appendix...* | 2011-23 | 25 & 35 | 9,553.36 | 939.54 |
| Apparel** | *See Appendix...* | *See Appendix...* | 2011-23 | 25 & 35 | 276,931.38 | 12,037.83 |

*See Appendix I.1 for breakdown of gender-sensitive textile and apparel products scheduled for liberalization in mid-term tranche.
***Source: Overseas Development Institute and STATIN.***
[1]***2004 data on US$ Value of Imports sourced from STATIN.***

*Long-Term Tranche (2011-28, 2011-33 & 2013-33)*

Ten (10) gender-sensitive products were identified in this tranche spanning the sectors of Agriculture and Mining (See Table 4.6c). Tariff rates (as at January 1, 2009) for these products ranged from 40% to 50%.

<u>Agriculture</u>

**Spices:** scheduled for liberalization in 2011-33 and as at January 1, 2009 attracts a tariff rate of 40%. Specific products identified:

- Fruits Of The Genus Capsicum Or Of The Genus Pimenta, Dried Or Crushed Or Ground
- Cinnamon And Cinnamon-Tree Flowers (Excl. Crushed And Ground)
- Crushed Or Ground Cinnamon And Cinnamon-Tree Flowers
- Cloves, Whole Fruit, Cloves And Stems
- Nutmeg
- Mace
- Saffron
- Turmeric 'Curcuma'
- Thyme And Bay Leaves

<u>Manufacturing</u>

**Cement:** scheduled for liberalization in 2011-28 and as at January 1, 2009 attracts a tariff rate of 50%. Specific product identified:

- Portland Cement (excl. White, whether or not artificially coloured)

Mining

Gender-sensitive products were not identified in this tranche.

**Table 4.6c GENDER-SENSITIVE PRODUCTS SCHEDULED FOR LIBERALIZATION IN LONG-TERM TRANCHE (2011-2033)**

| Gender-Sensitive Product Group | Code in Schedule | Description | TimeLine | Tariff Rate(%) as at 1st Jan. 2009 | US$ Value of Total Imports[1] | US$ Value of EU Imports[1] |
|---|---|---|---|---|---|---|
| Cement | 252329 | Portland cement (excl. white, whether or not artificially coloured) | 2011-28 | 50 | 1,170,846.66 | 0 |
| Pimento | 090420 | Fruits Of The Genus Capsicum Or Of The Genus Pimenta, Dried Or Crushed Or Ground | 2011-33 | 40 | 84,220.10 | 131.11 |
| Spices | 090610 | Cinnamon And Cinnamon-Tree Flowers (Excl. Crushed And Ground) | 2011-33 | 40 | 24,544.88 | 0 |
| Spices | 090620 | Crushed Or Ground Cinnamon And Cinnamon-Tree Flowers | 2011-33 | 40 | 43,352.73 | 0 |
| Spices | 090700 | Cloves, Whole Fruit, Cloves And Stems | 2011-33 | 40 | 19,173.85 | 0 |
| Spices | 090810 | Nutmeg | 2011-33 | 40 | 1166,937.35 | 0 |
| Spices | 090820 | Mace | 2011-33 | 40 | 1,620.64 | 0 |
| Spices | 091020 | Saffron | 2011-33 | 40 | 13,330.77 | 0 |
| Spices | 091030 | Turmeric 'Curcuma' | 2011-33 | 40 | 99,807.44 | 237.06 |
| Spices | 091040 | Thyme And Bay Leaves | 2011-33 | 40 | 21,787.30 | 0 |

***Source: Overseas Development Institute and STATIN.***

[1]***2004 data on US$ Value of Imports sourced from STATIN.***

*Excluded Tranche*

In the previous section (General Overview of EPA Schedule) it was highlighted that over 65% of the excluded products represented agriculture and manufactured food products. Given that most of the gender-sensitive products identified are food products from the agriculture and manufacturing sector it is not surprising that the majority of these goods are also excluded from the Economic Partnership Agreement. In effect, these goods will not be liberalized under the Economic Partnership Agreement, but retain their tariff rates as per other existing agreements or arrangements.

Generally, the gender-sensitive goods which are excluded from EPA Liberalization are as follows:

**Agriculture:** Vegetables (Cabbage, Carrot, Pumpkin, Tomatoes, Onions), Spices (Fresh Pimento, Curry, Ginger) Ground Provisions (Yams, Cassava, Sweet Potatoes, Dasheen, Banana/Plantain), Citrus (Orange, Grapefruit, Tangerine, Limes, Lemons), Other Fruits (Papaya) and Coffee.

**Manufacturing:** Poultry meat, Pork meat, Milk & Cream, Butter, Flour, Rice, Beer, Rum, Bread, Textiles & Apparel.[48]

[48] Specific items are excluded, while other categories are scheduled for liberalization. Refer to Tables 4.6a, 4.6b, Appendix I.1 and I.2 for specific descriptions of items.

**Mining:** No products are excluded.

Please refer to Appendix I.2 for the specific descriptions of these products.

### *4.1.4 Analysis of Gender Impact of EPA on Production and Consumption*

In analyzing the gender impact of EPA on production and consumption, it was noted that the majority of the gender-sensitive products identified are excluded from the EPA tariff liberalization commitments. This means that these products will retain their existing tariff rates and as a result will not be impacted by any adjustments that might take place as a result of tariffs being removed on these products (e.g. increased EU imports of these products leading to changes in employment, wages and consumption patterns). However, for the other products scheduled for liberalization, the impact on local production and consumption will be determined to a great extent by the tariff level, time period for liberalization, price effects, import competition and employment effects. They will also be impacted by intraregional (CARIFORUM) trade.

*Immediate Tranche*

Based on the review of the gender-sensitive products scheduled for immediate liberalization it is clear that the products which are to be liberalized in 2009 are those which mostly attract zero tariff or very low tariff rates.

**Agriculture Sector**

In reviewing the potential impact on production and consumption by sector, we see that significant economy wide changes are not expected in the Agriculture Sector as the only gender-sensitive good scheduled for liberalization in this tranche (cocoa beans) is already zero-rated. Furthermore, in 2004, Jamaica did not import cocoa beans from the EU (See Table 4.6b) or from any other country.

**Manufacturing Sector**

Of the gender-sensitive goods identified, only 'cheese'[49] and 'butter fat and butter oil' currently attract a tariff. In 2004, Jamaica's total imports for 'cheese' were valued at US$3,525,941.61, with EU accounting for less than 10% of these imports. With the removal of the tariff on 'cheese', increased imports from the EU may occur, however, given the current low tariff rate of 5%, large increases in imports of this product are not expected.

The EU also supplies Jamaica with 'butter fat and butter oil'. In 2004, Jamaica imported US$2,398,114.58 worth of this product from the EU which represented almost 80% of total imports of 'butter fat and butter oil' (See Table 4.6a). Given the current tariff rate of 10% which is to be removed in 2009, an increase in imports is expected as EU businesses capitalize on the reduced costs associated with their exports. However, the level of the tariff being removed is moderate and as such it is not expected that there will be a huge increase in these imports.

[49] Specifically 'Fresh cheese "unripened or uncured cheese", incl. whey cheese, and curd', 'Grated or Powdered Cheese', 'Processed cheese, not grated or powdered' and 'Blue-Veined Cheese'.

Other manufactured products identified such as cornmeal, tobacco, cement and apparel, currently attract zero tariff rates and as such, it is expected that the introduction of the EPA will not affect these imports.

**Mining Sector**
Significant changes are not immediately expected for production in the mining sector as *Sand & Gravel*, which is the only gender-sensitive mining product scheduled for liberalization in 2009 currently attracts a zero tariff rate. Furthermore, based on 2004 data, Jamaica's imports of this product from the EU were zero (See Table 4.6a). Therefore, the tariff liberalization scheduled to take place in 2009 will not have an effect on production or consumption within this sector.

*Mid-Term Tranche*

Over this period, the economy is expected to experience an increase in imports, specifically, in the manufacturing sector with the reduction of tariff rates as high as 35% for some products.

**Agriculture Sector**
Gender-sensitive products are not scheduled for liberalization in this time period.

**Manufacturing Sector**
Textile and apparel industry is dominated by females as a result of occupational stereotyping. As previously noted, the level of production within the textiles and apparel industry has been on the decline since the early 1990s. The overall downturn in the textile industry, following the implementation of NAFTA, resulted in the closure of free zone companies in Jamaica and the relocation of these industries to Latin American countries, such as Mexico, where cheaper labour could be sourced. The employment figures for the textile and apparel industry have shown a steady decline. Between 1995 and 1997, Jamaica lost 16,000 jobs in the Free Trade Zones (Wyss and White, 2004). More recent data were not available but companies have continued to close in recent years resulting in job losses of the predominantly female workforce.

Currently, Jamaica's apparel and textile imports greatly outweigh its exports (See Tables 4.8 and 4.10). Jamaica imports a significant volume of ready made garments such as trousers, skirts, shirts, t-shirts, shorts, blouses (crocheted, knitted) (over 7.8 million kg) etc. However, specific quantities and types of garments imported from EPA countries were not available. (see Table 4.8). On the other hand, Table 4.10 shows that Jamaica exported 88kg of textiles to the UK between 2006 and 2007. This small volume represented only 0.13% of the total 62,956kg exported for that year and this was valued at US$4,477. The low level of exports was due to the slow performing local textile production sector which has been decimated by competition from imports and high production costs. Within this context, it is expected that the scheduled liberalization of textiles and apparel products (with pre-EPA tariff rates of 25% and 35%), could possibly have a further negative impact on the few remaining local textile producers. Increased volumes of these imports could enter the market and compete with the remaining local manufacturers. However the impact is uncertain and this are of imports needs to be monitored. The impact of the EPA could be minor as the sector is already significantly weakened by previous trade agreements such as NAFTA. Labour in related sub-sectors is heavily dominated by females,[50] but most produce for local consumption (e.g Crimson Dawn and Sun Island). These companies are more likely to be affected by the high cost of production related to the cost of credit than EU imports.

**Mining Sector**

Four products (limestone, bauxite, gypsum and alumina – See Table 4.6b) from the mining sector have been identified for tariff elimination with tariff rates ranging from 15% to 25%. An examination of Jamaica's imports for these products, show that in 2004 Jamaica did not import limestone or gypsum from the EU or any other country. However, in reviewing EU's exports to the world, we see that EU exported limestone to Canada, Trinidad & Tobago and United States (Table 4.7a). Additionally, countries in Latin America and the Caribbean imported gypsum from the EU (Table 4.7b). This indicates that the EU has the supply capacity for these products and it is competitive for them to ship this product to the region. As such, with the elimination of tariffs on this product and the resulting change in costs, *Jamaica's local production may be negatively affected by the inflow of EU imports.*

**Table 4.7a TRADE STATISTICS (EXPORTS) OF EUR 27 TO SELECT PARTNERS IN THE CARIBBEAN AND LATIN AMERICA FOR LIMESTONE* IN 2007**

| Partners | Export Value (1000 EURO) | Export Qty (1000 kg) |
|---|---|---|
| Canada | 106.64 | 209 |
| Trinidad and Tobago | 6.33 | 2.6 |
| United States | 153.21 | 217.3 |

*Source: External Trade Statistics – EU Export Help Desk for Developing Countries. http://exporthelp.europa.eu/*

*Commodity 252100 - Limestone flux; limestone and other calcareous stone, of a kind used for the manufacture of lime or cement.

**Table 4.7b TRADE STATISTICS (EXPORTS) OF EUR 27 TO SELECT PARTNERS IN THE CARIBBEAN AND LATIN AMERICA FOR GYPSUM* IN 2007**

| Partners | Export Value (1000 EURO) | Export Qty (1000 kg) |
|---|---|---|
| Barbados | 5.61 | 4.2 |
| Canada | 12.89 | 126.3 |
| Colombia | 298.77 | 45,394 |
| Dominican Republic | 212.6 | 32,051 |
| Mexico | 27.06 | 83.5 |
| Trinidad and Tobago | 20.25 | 2,540 |
| United States | 4,622.93 | 648,222 |
| Venezuela | 2,652.92 | 379,164 |

*Source: External Trade Statistics - EU Export Help Desk for Developing Countries. http://exporthelp.europa.eu/*

* Commodity 252010 - Gypsum; Anhydrite.

### *Long-Term Tranche*

All the ten (10) goods scheduled to be liberalized in this time-period have tariffs no lower than 40%. *As such, the loss of import revenue during this time period is expected to be significant.* The effects of import competition in the various sectors will therefore be examined.

[50] Females represented 90% of the Free Trade Zone labour force in 1995 (Wyss and White, 2004).

**Agriculture Sector**

The tariff of 40% on spices (pimento, cinnamon, cloves, nutmeg, mace, saffron, turmeric, thyme and bay leaves – Table 4.6c) is to be removed in this tranche. It is important to note that Jamaica imports very small quantities of spices from the EU (See Table 4.6c), however, total spice imports in 2004 was valued at US$1,474,775.06. For those spices (i.e. cinnamon, cloves, nutmeg, mace, saffron and thyme) which Jamaica does not import from the EU, it is interesting to highlight that the EU exports these goods to USA, Canada as well as countries in Latin America (Argentina, Brazil, Costa Rica, etc.) and the Caribbean (e.g. Haiti, Trinidad).[51] Thus, indicating that the EU does produce these spices and can competitively export to the western hemisphere. As such, a large increase in imports of these spices from the EU may occur as a result of the reduction in tariffs.

**Manufacturing Sector**

The liberalization of *Portland Cement* may adversely affect the economy as the removal of the 50% tariff rate signals that unless local production is competitive, cheaper imports will affect consumption for local cement. In 2004, Jamaica's total imports of cement were valued at US$1,170,846.66. Although cement was not imported from the EU in 2004, Jamaica's cement *production may be negatively impacted to the extent that the EU can supply cement at competitive prices (as a result of the reduction in tariffs).*

In examining EU exports to the world, the data shows that in 2007, EU exported cement to countries within the Caribbean as well as in Latin American (See Table 4.7c). As Jamaica did not source cement from the EU during this time period, it suggests that cement imports from EU may have been uncompetitive as cheaper supplies of the product were available elsewhere. However, with the removal of the 50% tariff rate, there exists the strong possibility that large quantities of EU imports could flood the market as the removal of tariffs translates into cheaper costs and more competitive prices. Given Jamaica's numerous experiences with cement shortages in local production, *this industry could be seriously affected especially if consistency in output and competitive prices cannot be achieved by the local market*. Additionally, this industry mainly employs male workers and as such, it is expected that the impact on this sector will be mainly felt by these male workers.

Some of the potential effects include reduced employment and lower wages for these male workers, to the extent that increased productivity within the cement industry (translating into competitive prices) cannot be attained.

**Table 4.7c TRADE STATISTICS (EXPORTS) OF EUR 27 TO SELECT PARTNERS IN THE CARIBBEAN AND LATIN AMERICA FOR CEMENT* IN 2007**

| Partners | Export Value (1000 EURO) | Export Qty (1000 kg) |
|---|---|---|
| Argentina | 9.27 | 110.50 |
| Barbados | 126.54 | 15.30 |
| Belize | 0.20 | 0.20 |
| Brazil | 31.34 | 14.10 |
| Canada | 183.19 | 76.00 |
| Cuba | 30.61 | 186.00 |
| Dominican Republic | 78.48 | 779.00 |

[51] *Source: External Trade Statistics - EU Export Help Desk for Developing Countries.* http://exporthelp.europa.eu/

| | | |
|---|---|---|
| El Salvador | 1.75 | 1.40 |
| Guatemala | 1.08 | 1.10 |
| Guyana | 3.12 | 5.00 |
| Mexico | 13.62 | 40.00 |
| Panama | 0.22 | 2.10 |
| St Vincent and the Grenadines | 0.04 | 0.20 |
| Trinidad and Tobago | 82.82 | 855.60 |
| United States | 40,170.26 | 1,162,848.60 |
| Venezuela | 0.90 | 18.00 |

*Source: External Trade Statistics - EU Export Help Desk for Developing Countries.* http://exporthelp.europa.eu/
* Commodity 252329 - Portland cement (excl. white, whether or not artificially coloured).

**Mining Sector**
Gender-sensitive products are not scheduled for liberalization in this time period.

*Excluded Tranche*

With the exclusion of many agricultural products from the Economic Partnership Agreement, local producers are protected from import competition. It is important to note that Jamaica already imports a considerable amount of vegetables and starchy foods (See Table 4.8), mainly from North America and the Caribbean. Jamaica can be described as a net importer of agricultural produce as imports are twice that of exports (Jackson and Wedderburn, 2009). As such, increased competition in this area from EU imports as a result of the removal of tariffs, may have severely affected local farmers (mostly male) while at the same time negatively impacting backyard and subsistence farmers, many of which are women. The exclusion of these crops, however, facilitates their continued production for income as well as for household consumption. For Jamaica, this is extremely important especially within the context of food security and the dependence on farming in rural communities and its role in development.

**Summary of Goods Producing Sector - Imports**

***Manufacturing:*** The Manufacturing Sector is expected to be the hardest hit with the liberalization of tariffs on textiles and apparel in the medium-term, as well as the subsequent removal of tariffs on cement in the long-term. Given the volume of current imports of textile and apparel from the EU, it is highly anticipated that the removal of tariffs will result in the market being heavily flooded with cheap EU imports. With the heavy concentration of female labour in the textiles and apparel industry, there will be a differential impact in this sector, with women being most adversely affected. To the extent that local companies are not able to compete with cheap EU imports, the livelihood of women employed in the sector and their earning ability will be challenged. Job cuts, loss of income, decreased household expenditure are some of the realities that these women who make up the majority of the workforce in the textiles and apparel industry are likely to face.

Furthermore, the working conditions described within the Free Trade Zones – i.e. few opportunities to gain skills[52] (after years of working) and the increased likelihood to develop health problems (e.g. breathing problems and poor eyesight)[53] – could also severely limit the

[52] Many of these female workers do not have the qualifications for other jobs in the formal sector or may not posses the required level of education for retraining courses (Wyss and White, 2004).
[53] Wyss and White (2004).

opportunities for females to be successfully retrained to enter other fields. This potentially implies large numbers of unemployed women, without the skills and/or required level of education to re-enter the workforce. By extension, this has consequences for the household as it affects the ability of these women to provide financially for their families.

**Mining:** Cement production is also expected to be negatively affected in the long-term with the removal of the 50% tariff rate. As this industry is male-dominated, it is anticipated that males will bear the brunt of the EPA impact due to reductions in local production and employment as a result of the likely increase in imports of cement from the EU. The impact of job cuts of males working in the sector will be felt at the level of their households, as a result of lower levels of disposable income for consumption-related purchases as well as other family-related expenses.

For both of these goods (i.e. textiles/apparel and cement), it is important to highlight the timeframe for liberalization which indicates that the complete removal of tariffs for any of these goods will not occur before 2018.[54]

[54] The Mid-Term Tranche includes the following time periods: 2011-18, 2011-23 & 2013-23.

Consistent with the Terms of Reference, Tables 4.8 illustrates Jamaica's main imports from the world (highlighted in bold) as well as main imports from the EU (highlighted in purple). Based on the data provided below, Jamaica's main imports from the world include *milk & cream products butter & cheese, rice* and *beverages*. Specifically, imports from EU are heavily represented by *milk & cream products, butter& cheese, onions* and *beverages*.

**Table 4.8 EPA IMPORTS FOR JAMAICA 2006-2007**

| PRODUCT | CODE | TOTAL IMPORT/kg | EPA IMPORT/kg | USS VALUE OF TOTAL IMPORT | USS VALUE OF EPA IMPORT | TARIFF REVENUE from EU/$US (Collected) | TARIFF RATE/($US per kg | TOTAL IMPORT/ % of GDP | EPA IMPORT/ % of GDP |
|---|---|---|---|---|---|---|---|---|---|
| **ANIMAL & ANIMAL PRODUCTS 01-05** | | | | | | | | | |
| Hams | 0210110000 | 63 926 | | 125 300 | | | | 0. 0035% | |
| Pigtail, salted/brine | 0210191010 | 1 068 878 | | 2 158 805 | | | | 0. 06% | |
| **All Milk & cream conc., condensed, evaporated in powder, granules & other solid forms, (un)sweetened** | **0401100000 0401200000 0401300000 0402100000 0402210000 0402290000 0402910010 0402991010 0402991020 0402999000** | **7 935 907** | **3 905 292** | **18 693 590** | **4 306 902** | **70 988.37** | **0.018/kg** | **0. 52%** | **0. 002%** |
| Milk Products – yogurt, buttermilk, curdles milk, whey | 0403100000 0403900000 0404100000 | 1 318 386 | 118 724 | 4 132 486 | 296 781 | 20 174.64 | 0.17/kg | 0.11% | 0.008% |
| **Butter ,Cheese butter fats & oils, daily spreads, fats & oils derived from milk, processed, grated** | **0405101000 0405102000 0405200000 0405901000 0405902000 0405909000 0406100000 0406200000 0406300010 0406300090 0406400000 0406900000** | **6 418 380** | **448 396** | **26 614 163** | **1 322 001** | **123 112.83** | **0.27/kg** | **0.736%** | **0.037%** |
| **VEGETABLE PRODUCTS 06-15** | | | | | | | | | |
| Cabbage, fresh or chilled | 0704901000 | 96 409 | | 39 025 | | 827.36 | | 0.001% | |

**Table 4.8(cont'd) EPA IMPORTS FOR JAMAICA 2006-2007**

| PRODUCT | CODE | TOTAL IMPORT/kg | EPA IMPORT/kg | US VALUE OF TOTAL IMPORT | US VALUE OF EPA IMPORT | TARIFF REVENUE from EU/$US (Collected) | TARIFF RATE/($US per kg | TOTAL IMPORT/ % of GDP | EPA IMPORT/ % of GDP |
|---|---|---|---|---|---|---|---|---|---|
| Carrots, fresh or chilled | 0706101000 | 318 115 | 6 | 102 733 | 23 | 1 882.26 | | 0.0028 % | |
| Cassava, fresh, dried | 0714100010 | 647 | | 352 | | | | 0.00001% | |
| Coffee beans for blending, not roasted or decaff. | 0901111000 | 130 827 | | 412 786 | | **3 094.30** | | 0.011 % | |
| Cornmeal | 1103130010 | 2 669 950 | | 1 456 173 | | | | 0. 013% | |
| Counter Flour | 1101009010 | 4 030 423 | 57 | 2 135 205 | 23 | | | 0.059 % | |
| Melons, fresh | 0807199000 | 170 706 | | 92 613 | | | | 0.0026 % | |
| **Onions, fresh or chilled** | **0703101000** | **8 406 806** | **6 918 374** | **2 827 741** | **2 269 191** | **1 075 069.77** | **0.16/kg** | **0.078%** | **0.063%** |
| Paprika, dried, crush, ground | 0904201000 | 58 435 | 32 003 | 170 757 | 77 040 | 0.00 | | 0.0047 % | 0.0021% |
| Potatoes, fresh or chilled | 0701900000 | 9 220 689 | 1 549 110 | 3 000 881 | 525 456 | 368 964.06 | 0.24/kg | 0.083% | 0.015 % |
| Pumpkin | 0709903000 | 200 | | 62 | | | | 0.000002% | |
| **Rice – husked rice, white, parboiled, semimilled, wholly milled, broken, for retail** | **1006109090 1006201000 1006202000 1006203000 1006204000 1006301000 1006302000 1006303000 1006305000 1006306000 1006307000 1006308000 1006401000 1006409000** | **99 615 930** | **1 843** | **39 714 430** | **3 646** | **747.81** | **0.41/kg** | **1.097%** | **0.0001%** |
| Tomatoes, fresh or chilled | 0702000000 | 359 400 | | 160 759 | | | | 0. 0044% | |
| **FOODSTUFFS 16-24** | | | | | | | | | |
| **Beverages** | **2202909090** | **18 749 872** | **4 042 852** | **27 273 341** | **11 997 098** | **425 825.84** | **0.11/kg** | **0.75%** | **0.33%** |

**Table 4.8(cont'd) EPA IMPORTS FOR JAMAICA 2006-2007**

| PRODUCT | CODE | TOTAL IMPORT/kg | EPA IMPORT/kg | US VALUE OF TOTAL IMPORT | US VALUE OF EPA IMPORT | TARIFF REVENUE from EU/$US (Collected) | TARIFF RATE/($US per kg | TOTAL IMPORT/ % of GDP | EPA IMPORT/ % of GDP |
|---|---|---|---|---|---|---|---|---|---|
| Beer made from malt | 2203001010 | 382 342 | 13 714 | 369 476 | 31 580 | 13 077.67 | 0.95/kg | 0.01 % | 0.0009% |
| Cigarette | 2402200000 | 1 157 299 | 5 029 | 8 252 782 | 131 554 | 15 360.79 | 3/05/kg | 0.228 % | 0. 0036% |
| **MINERAL PRODUCTS 25-27** | | | | | | | | | |
| Xylenes | 2707300000 | 5 760 | | 11 197 | | | | 0.0003 % | |
| **Kerosene type jetfuel** | **2710191010** | **81 967 775** | | **58 224 719** | | | | **01.61 %** | |
| Bitumous oil & shale, & tar sands | 2714100000 | 113 553 | 10 525 | 227 280 | 25 923 | 0.00 | | 0.006% | 0.0007% |
| **Gasoline, 87 octane** | **2710113020** | **381 843 476** | | **284 700 286** | | **511 257.15** | | **7.87%** | |
| Gravel, crushed stones | 2517100010 | 27 746 | 1 059 | 22 341 | 1 714 | | | 0.0006% | 0.00005 % |
| Gypsum | 2520101000 | 17 938 | | 14 735 | | | | 0.0004 % | |
| **Lubricating oils & greases** | **2710198300 2710198400** | **23 926 211** | **65 585** | **43 122 191** | **443 012** | 36 990.09 | **0.56/kg** | **1.19 %** | **0. 012%** |
| Silica sands, quartz | 2505100000 | 2 222 809 | 3 423 | 522 543 | 6 169 | 0.00 | | 0.014 % | 0.0002% |
| **Petroleum and bitumous oil** | **2709001000** | **1 154 139 588** | | **515 413 225** | | | | **14.25%** | |
| **CHEMICALS & ALLIED INDUSTRIES 28-38** | | | | | | | | | |
| Automotive Paints | 3208901000 | 6 948 | 31 | 64 766 | 741 | | | 0.0018% | 0.00002% |
| Paints & Varnishes including enamels (synthetic polymers) | 3208909000 | 208 820 | 11 055 | 556 376 | 27 877 | **4 041.35** | 0.27/kg | 0.015 % | 0. 0008% |
| **TEXTILES 50-63** | | | | | | | | | |
| **Trousers, skirts, shirts, t-shirt, overalls, shorts, blouses (crocheted, knitted)(man-made fibers, cotton) etc** | **6103109000 to 6104530000** | **7 846 364.76** | **N/A** | **68 254 385.64** | **N/A** | 3 187.50 | | **1.89 %** | |

Modified from 2005-2007 Preliminary Trade Report (STATIN, 2008) & Tariff Revenue (Ministry of Finance, Budget Dept., 2007)

Main Imports from the World: **XXXX** Main Imports from EPA Countries (and the World): **XXXX**

Notes: Jamaica's GDP for 2007 was US$3618.0 million- Economic and Social Survey of Jamaica, PIOJ, 2007 and STATIN, 2008 Tariff Revenue provided in $J (Ministry of Finance, Budget Dept., 2007) converted to $US using the annual average exchange rate for 2007 of J$69.06 = US$1.00 (Bank of Jamaica, 2008)

## 4.2. EPA Analysis of Goods Producing Sector: Jamaica's Exports

In addition to examining the impact of the EPA on imports from the EU, it is also important to review the effects of the Agreement on Jamaican exports to the EU. Under the EPA, Jamaica (as part of CARIFORUM) has Duty-Free Quota-Free (DFQF) access to the EU for most of its exports which qualify, as stated under the Rules of Origin. In order to fully analyze the impact of the EPA, the trade conditions which existed pre-EPA must also be examined in order to determine the export opportunities created by the EPA. In Table 4.9, the treatment of the identified gender sensitive products in the Cotonou Agreement[55] and the EPA are compared. This approach seeks to clearly identify the possible benefits and export opportunities for specific goods under the EPA.

**Table 4.9 COMPARISON OF TREATMENT OF JAMAICA'S EXPORTS OF IDENTIFIED GENDER SENSITIVE PRODUCTS UNDER THE COTONOU AGREEMENT VS. ECONOMIC PARTNERSHIP AGREEMENT**

| Exports | Cotonou Agreement | Economic Partnership Agreement |
|---|---|---|
| ***I. Traditional Exports*** | | |
| **Agriculture** | | |
| Banana | Duty Free and Trade quota | DFQF access |
| Citrus fruits | Duty payable on:<br>1. '*Fresh sweet oranges'* (HS Code: 08051020)<br>2. *'Fresh or dried tangerines'* (HS Code: 08052070)<br>3. *'Fresh or dried tangelos, ortaniques, malaquinas and similar citrus hybrids'* (HS Code: 08052090)<br>4. *'Fresh or dried oranges (excl. fresh sweet oranges)* (HS Code: 08051080) | DFQF access |
| Coffee | DFQF access | DFQF access |
| Cocoa (beans, shells) | DFQF access | DFQF access |
| Pimento | DFQF access | DFQF access |
| **Manufacturing** | | |
| Sugar | Trade quota and Price guarantee | DFQF access[1] |
| Rum | DFQF access | DFQF access |
| Coffee Products | DFQF access | DFQF access |
| Cocoa Products | Duty payable on:<br>1. '*Chocolate and other food preparations containing cocoa'* (HS Codes: 18061020, 18061030, 18061090, 18069060, 18069070 & 18069090)<br><br>DFQF access for:<br>1. '*Cocoa paste, whether or not defatted'* (HS Code: 1803)<br>2. *'Cocoa butter, fat and oil'* (HS Code: 1804) | DFQF access |

[55] As indicated in the Background Chapter of this paper (Section 1.2), Trade relations between Jamaica and the EU were previously governed by the Cotonou Agreement.

**Table 4.9** *(cont'd)* **COMPARISON OF TREATMENT OF JAMAICA'S EXPORTS OF IDENTIFIED GENDER SENSITIVE PRODUCTS UNDER THE COTONOU AGREEMENT VS. ECONOMIC PARTNERSHIP AGREEMENT**

| **Exports** | **Cotonou Agreement** | **Economic Partnership Agreement** |
|---|---|---|
| Cocoa Products *(cont'd)* | 3. *'Cocoa powder, not containing added sugar or other sweetening matter'* (HS Code: 1805) | DFQF access |
| Citrus Products | DFQF access | DFQF access |
| **Mining** | | |
| Bauxite | DFQF access | DFQF access |
| Alumina | DFQF access | DFQF access |
| Gypsum | DFQF access | DFQF access |
| ***II. Non-Traditional Exports*** | | |
| **Agriculture** | | |
| Sweet Potato | DFQF access | DFQF access |
| Root crops *(excl. manioc 'cassava' and sweet potatoes)* - yams | Duty payable on:<br>1. *'Roots and tubers of arrowroot, salep, Jerusalem artichokes and similar roots and tubers with high starch or insulin content, fresh, chilled, frozen or dried (excl. manioc 'cassava' and sweet potatoes)'* - i.e. Yams (HS Code: 07149019) | DFQF access |
| Cabbage | Duty payable | DFQF access |
| Carrot | Duty payable | DFQF access |
| Pumpkin | DFQF access | DFQF access |
| Papayas | DFQF access | DFQF access |
| Other spices (e.g. pepper, ginger, etc.) | DFQF access | DFQF access |

Source: Data compiled from The Cotonou Agreement and "The *CARIFORUM and Pacific ACP Economic Partnership Agreements"* by Christopher Stevens, Jane Kennan and Mareike Meyn (2009).
[1] Quota free access is to be phased in over a period of years. Additionally, the price guarantee for sugar under the Sugar Protocol (i.e. the linking of the price received by ACP exporters to the price received by EU producers) is removed with the start of the DFQF access.

***Agriculture:*** Jamaica's main exports are its traditional agricultural products, such as banana, sugarcane, citrus, pimento, cocoa, coffee, and coconut (Table 4.10). Other important non-traditional agricultural exports include papaya, avocados, hot pepper, thyme, root crops (such as yams and sweet potatoes), and vegetables like pumpkin and cucumbers (Table 4.10). Based on the treatment of these products in the Cotonou Agreement as compared to The Economic Partnership Agreement (Table 4.9) we see that opportunities are created by the EPA to export greater volumes of citrus fruits (specifically: oranges, tangerines, ortaniques), cabbage, carrot and yams. Previously, these crops attracted tariffs under Cotonou, but are completely duty free under the EPA. In 2006, the EU accounted for 36% of Jamaica's citrus exports, 32% of cabbage exports, and 9% of yam exports (Table 4.10). As such, the EPA provides an opportunity to increase exports to the EU to take advantage of the removal of tariffs. In order to ensure that high quality crops continue to be produced at competitive prices and in larger quantities, emphasis will need to be placed on building the capacity of men and women in rural areas to meet production and export standards. This will enable these export opportunities to lead to increased prospects for employment in geographical areas cultivating these crops.

However, it must be noted that given the previous analysis of the gender disaggregation of labour in the Agriculture Sector and the inherent inequalities identified, it is expected that males will benefit to a greater extent than females. Based on the earlier analysis, three of the four agricultural crops (cabbage, carrot and yams) highlighted for potential export opportunities, account for higher shares of female workers as compared to their male counterparts (See Appendix J.1). This highlights the importance of these agricultural crops in female-led farming operations. As such, female farmers can also benefit from these export opportunities created by the EPA, however the challenge will be to support these farmers with the necessary resources (e.g. land, finances, extension support, etc.) in order to be prepared for additional crop production. Given the evidence of women's restricted access to some of these resources, targeted initiatives will have to be developed to actively ensure the participation of females in these new export opportunities.

In the case of bananas, with the removal of the EU import quota, this could possibly present an additional export opportunity for Jamaica. However, within the context of competition from cheaper Latin American producers[56] and the country's loss of European tariff preferences,[57] this seems highly unlikely. Furthermore, as stated earlier, Jamaica's recent hurricane experiences, especially over the last three years (culminating with Tropical Storm Gustave in August 2008) has resulted in significant damage to the industry. As a result one of the major producers responsible for 90% of exports to EU has cut its production and laid off many workers (five hundred jobs) in North Eastern Jamaica. Given banana's susceptibility to the weather and the almost perennial weather-related agricultural destruction (e.g. hurricanes, tropical storms, floods, etc.) that the island contends with, coupled with changes in the international trade environment, banana exports to the EU market do not appear as attractive.

Instead, other opportunities for the development of value-added banana products must be considered. Local authorities have started to examine these prospects as well as promote the benefits of production for local use. Domestic consumption of bananas has been categorized as "largely unsatisfied [especially for banana chip production] and commanding a higher price" (*End of Banana Exports in Sight - Tufton Looks to Alternatives*, Jamaica Gleaner, Wednesday, September 24, 2008). It is expected that there will be continue to be a differential gender impact, as layoffs in the export sector affect largely males who reap the crop, but also females who are employed in the washing and packing of the export crop. However, opportunities in the manufacturing sector for new value-added banana products may create employment for both males and females. The Scientific Research Council has been examining other value added banana products (apart from the locally popular banana chips), in this regard. Some of the various alternatives highlighted include banana-based nutraceuticals, animal feed as well as banana flour.

***Manufacturing:*** Traditional export products are sugar, rum, coffee products, cocoa products and citrus products. In 2007, some 71,400 persons were employed in Jamaica's manufacturing sector, of which 19,500 (27%) were women. The major exports from this sector were food and beverages such as cocoa, rum, stout. In examining, the export

[56] It is estimated estimated that Latin American producers control more than 80 per cent of the EU market ('Banana Issue Threatening to Split WTO', Jamaica Gleaner, July 25, 2008).

[57] The lowering of tariffs on non-African, Caribbean and Pacific imports into Europe is to decline from the current €176 per tonne to €114 per tonne by 2016.

opportunities for this sector, we see that the removal of tariffs on certain cocoa products may provide the manufacturing sector with some additional opportunities for exports. However, it is generally observed that there will not be numerous export opportunities for manufactured products, as Jamaica already greatly benefitted from Duty Free Quota Free access to EU, under Cotonou, for most of these products and this continues under the EPA (Stevens, Kennan and Meyn, 2009).

The most notable exception here is sugar. Based on the EPA commitments, the Sugar Protocol will end in September 2009, after which Jamaica will embark on a qualified and phased-in regime of duty free, quota free access to the EU market. More immediately, since January 2008, CARICOM Producers, including Jamaica have benefitted from increased market access to the EU specifically through the increase in the trade quota to the tune of 30,000 tons for the region. As such, at first glance it appears that additional export opportunities are being created for sugar with the EPA. However, this must be examined with the current international environment as well as the existing conditions in the local industry.

Declining sugar and cane prices over the years have negatively affected local producers, with many industry experts of the opinion that "without the European Union price support, Jamaica's loss-making sugar sector is deeply uncompetitive and could face collapse" (*Jamaica to Probe Feasibility of Sugar Refinery - Government Invites Bids for Study,*[58] Jamaica Gleaner, March 4, 2009). The local sugar industry is characterized by high costs of production, inefficient factory operations, poor cane quality, low cane production and cane yields, among other factors (Sugar Industry Authority). As such, with the removal of the Sugar Protocol (including the price guarantee), the local sugar industry, with its mainly rural employment of male labour, will be negatively affected. Additionally, with the large losses[59] over the past years by the Government's Sugar Company of Jamaica (J$6 billion over the fiscal years 2004-2006), the industry could not afford for any further delays in its privatization efforts to revitalize the industry. However, recent negotiations by the Government with interested companies have not borne fruit, further casting the future of this industry in doubt.

However, Jamaica may be able to benefit from sugar, through exploring the potential market for manufactured products which contain sugar. Based on the EPA commitments, it is important to bear in mind that the DFQF access (as of October 2009) for sugar will be subject to special safeguard clauses, which will monitor the export levels of sugar to the EU and invoke special measures where CARIFORUM sugar exports negatively affect local EU production. As such, this potentially could place restrictions on the extent of export opportunities under the EPA.

Additionally, there may be export opportunities for specific dairy products which previously attracted tariffs under the Cotonou.

***Mining:*** Bauxite, alumina and gypsum represent the traditional export products for this sector. The bauxite-alumina mining sector is important to the Jamaican economy in terms of its contribution to GDP, its value in export trade and in employment. Jamaica's main mineral export is aluminium ore and the value of export trade to EPA countries in 2007 for concentrates and calcined bauxite was US$23,005,039. Jamaica also exports, limestone,

[58] Production of refined sugar for the domestic market is among one of the solutions being suggested for Jamaica's sugar industry.
[59] The Government has also embarked on an initiative to produce ethanol for export as well as to use ethanol as an additive in gasoline. These were all initiatives aimed at diversifying from sugar into other cane-based products.

gypsum and gravel, crushed sand and stones. In 2007, some 8,900 persons were employed in the sector: 8,100 males (91%) and 800 females (8%). This indicates that the sector is male-dominated in terms of employment.

In 2007 the total value of bauxite exports was US$95,503 million, while total bauxite production in the same year was 14,567.7 tonnes. Given that bauxite exports to EU were already duty free under Cotonou (and also Lomé), the implementation of the EPA, does not present new tariff-free export opportunities for the EU. However, as it relates to the CARIFORUM States, to the extent that trade was previously hindered by intra-regional trade restrictions, Jamaica may benefit from exports to other CARIFORUM States as a result of the EPA. Generally, projections of benefits from the sector must be analyzed against the background of the current global economic recession which has resulted in a reduced demand for aluminum ore. As a consequence, local bauxite companies have cut production and staff. Examining the gender division of labour in this sector also indicates that any indirect opportunities to increase production and export of products from the mining sector will have a differential gender impact on employment. Given that males represent the overwhelming majority of employed labour in this sector, any opportunities which arise for this sector will largely benefit male workers.

**Summary of Goods Producing Sector - Exports**

The findings from the analysis indicate that the majority of gender sensitive goods (as defined in this paper) are mostly excluded from tariff liberalization. Products with either zero-rated tariffs or low tariffs also represent the majority of the goods which are scheduled for immediate liberalization. Where these gender sensitive goods are scheduled for liberalization, the timelines for implementation are longer, thus allowing a few years for adjustment and preparation.

Based on the analysis of the previous trade agreement, Cotonou and the expectations of increased opportunities from the EPA, there do not appear to be many opportunities to export goods to the EU. For agriculture, products like citrus, yam, cabbage and carrot represent potential areas for increased export. Similarly in manufacturing, processed cocoa products, value-added banana products and processed sugar products may all be prospects for new or increased Jamaican exports to the EU.

The following table indicates Jamaica's main exports to the world (in bold), as well as main exports to the EU (highlighted in purple).

**Table 4.10 EPA EXPORTS FOR JAMAICA 2006-2007**

| PRODUCT | CODE | Output in metric units | TOTAL EXPORT/ kg | EPA EXPORT/ Kg | US VALUE OF TOTAL EXPORT | US VALUE OF EPA EXPORT | TOTAL EXPORT AS A PROPORTION OF OUTPUT/% | US VALUE OF TOTAL EXPORT AS A PROPORTION OF GDP/% | US VALUE OF EPA EXPORT AS A PROPORTION OF GDP/% |
|---|---|---|---|---|---|---|---|---|---|
| **ANIMAL & ANIMAL PRODUCTS 01-05** | | | | | | | | | |
| Poultry | 0105110000 | 63 155 000 | | | | | | | |
| ***All Milk & cream conc., condensed in powder, granules & other solid forms & All butter, cheese, fats & oils derived from milk, processed, grated** | **0402100000 0402210000 0402290000 0402910000 0402910020 0402991020 0402999000 0405101000 0405102000 0405902000 0405909000 0406100000 0406200000 0406300010 0406300090 0406900000** | **16 313 000** | **1 085 432** | **723** | **6 964 242** | **7 394** | **6.654%** | **0.0019%** | **0.000002%** |
| **VEGETABLE PRODUCTS 06-15** | | | | | | | | | |
| **Banana, fresh** | **0803001000** | **17 473 000** | **17 390 828** | **17 390 515** | **9 222 318** | **9 220 918** | **9.95%** | **0.25%** | **0.25%** |
| Cabbage, fresh/chilled | 0704901000 | 2 211 000 | 1 885 | 807 | 2 859 | 923 | 0.0853% | 0.00008 | 0.000025 % |
| Pimento & Capsicum | 0709609000 | 15 152 000 | 128,754 | 966 | 385,561 | 4,022 | 0.849% | 0.011 | 0.0001% |
| **Citrus (oranges, ugli,ortaniques, grapefruits, etc.)** | **0805100010 0805201010 0805201020 0805202010 0805209010 0805400010** | **124 553 000** | **3 801 201** | **1 427 788** | **1 821 093** | **659 990** | **3.05%** | **0.05%** | **0.018%** |

**Table 4.10(cont'd) EPA EXPORTS FOR JAMAICA 2006-2007**

| PRODUCT | CODE | Output in metric units | TOTAL EXPORT/ kg | EPA EXPORT/ Kg | US VALUE OF TOTAL EXPORT | US VALUE OF EPA EXPORT | TOTAL EXPORT AS A PROPORTION OF OUTPUT/% | US VALUE OF TOTAL EXPORT AS A PROPORTION OF GDP/% | US VALUE OF EPA EXPORT AS A PROPORTION OF GDP/% |
|---|---|---|---|---|---|---|---|---|---|
| Coffee beans for blending, not roasted/decaff. | 0901111000 | 15 117 000 | 503 | 7 | 21 593 | 532 | 0.0033% | 0.0006% | 0.00001% |
| All Dasheens , fresh, natural/artificially dried | 0714902010 0714902020 | 10 831 000 | 1 079 326 | 69 406 | 1 455 510 | 103 363 | 9.97% | 0.402% | 0.0029 % |
| Eddoes, fresh/dried | 0714903010 | N/A | 211 319 | 133 823 | 383 950 | 234 595 | | 0.011 % | 0.0065% |
| Legumes | 0708900090 | 5 644 000 | 120 | | 168 | | 0.002% | 0.000005 % | |
| Plantain, fresh | 0803002000 | 19 087 000 | 261 | 218 | 504 | 421 | 0.0137% | 0.00001 % | 0.00001 % |
| Pumpkins, fresh/chilled | 0709903000 | 33 749 000 | 538 362 | 77 896 | 409 050 | 58 990 | 1.817% | 0.011% | 0.0016% |
| Sweet Potatoes | 0714200010 | 26 055 000 | 1 166 298 | 817 942 | 1 929 544 | 1 311 609 | 4.476% | 0.05% | 0.0086% |
| **Sugarcane Bulk for commercial export | 1212993002 | 158 000 000 | 15 053 000 | 147 035 000 | 101 246 000 | 98 582 000 | 96.87% | 2.80% | 2.72% |
| Papaya | 0807200000 | 9 201 000 | 1 339 622 | 79 397 | 2 747 675 | 106 353 | 14.56% | 0.076% | 0.003% |
| Yams | 0714905010 | 113 124 000 | 9 647 314 | 897 497 | 15 437 365 | 1 407 923 | 8.528% | 0.427% | 0.039% |
| FOODSTUFFS 16-24 | | | | | | | | | |
| *Beer made from malt | 2203001010 | 66 898 000 litres | 27 035 587 | 592 873 | 31 940 404 | 728 931 | | 0.85% | 0.019% |
| Cocoa beans, raw | 1801001000 | 1 915 000 | 470 863 | 456 500 | 1 985 484 | 1 682 699 | 24.58% | 0.055% | 0.047% |
| Rum | 2208401010 | 23 902 000 | | 5 781 500 | | | | | |
| MINERAL PRODUCTS 25-27 | | | | | | | | | |
| Aluminium Ore, concentrates & calcined bauxite | 2606009000 | 14 567 700 000 | 4 748 841 000 | 75 175 | 203 887 725 | 23 005 039 | 3.26% | 5.6% | 0.636% |
| Gravel, crushed stone used for concrete | 2517100010 | 3 611 000 000 | 67 178 | | 8 904 | | 0.0019% | 0.00025% | |

**Table 4.10 (cont'd) EPA EXPORTS FOR JAMAICA 2006-2007**

| PRODUCT | CODE | Output in metric units | TOTAL EXPORT/ kg | EPA EXPORT/ Kg | US VALUE OF TOTAL EXPORT | US VALUE OF EPA EXPORT | TOTAL EXPORT AS A PROPORTION OF OUTPUT/% | US VALUE OF TOTAL EXPORT AS A PROPORTION OF GDP/% | US VALUE OF EPA EXPORT AS A PROPORTION OF GDP/% |
|---|---|---|---|---|---|---|---|---|---|
| Gypsum | 2520101000 | 227 700 000 | 50 080 921 | | 413 439 | | 21.99% | 0. 011% | |
| Limestone flux, etc | 2521000000 | 2 950 000 000 | 60 972 440 | | 1 003 805 | | 2.067% | 0.0278 % | |
| Oils (Fuel, turbojet, diesel | 2710191020 2710194010 2710196000 | N/A | 703 093 579 | | 325 974 194 | | N/A | 9.01% | |
| **CHEMICALS & ALLIED INDUSTRIES 28-38** | | | | | | | | | |
| **Aluminium oxide** | **2818200000** | 3 940 600 000 | **3 586 909 000** | **1 337 091 000** | **1 102 176 554** | **411253064** | **91.02%** | **30.46%** | **11.37%** |
| **TEXTILES 50-63** | | | | | | | | | |
| Trousers, skirts, shirts, t-shirt, overalls, shorts, blouses (crocheted, knitted)(man-made fibers, cotton) etc | 6104590000 to 6104530000 | **N/A** | 62 956 | 88 | 1 874 279.82 | 4477 | N/A | 0.052% | |

Modified from 2005-2007 Preliminary Trade Report (STATIN, 2008)
Main Exports: **XXXX** Main Exports to EPA Countries: **XXXX**

Notes
Jamaica's GDP for 2006 was US$3747.7 million- Economic and Social Survey of Jamaica, PIOJ, 2007
Jamaica's GDP for 2007 was US$3618.0 million- Economic and Social Survey of Jamaica, PIOJ, 2007 and STATIN, 2008
Output data modified from Economic & Social Survey of Jamaica, PIOJ, 2007
*2007 data not available for Output; all figures used in these cases are that of 2006
** All figures obtained from Economic & Social Survey of Jamaica, PIOJ, 2007**.**

*Taken from Economic and Social Survey Jamaica, 2007.*

## 4.3. EPA Analysis of Services Sector

In analyzing the Services Sector, given the absence of sex disaggregated micro-data, proxies were used to assess the likely impact. One of the strategies employed was to examine sex disaggregated data on graduations from tertiary institutions in the ESSJ 2007 (See Table 4.11). The assumption was that the data reflect the likely gender distribution of labour in specific sub-sectors of the services sector. It has implications for local persons, employed in Services that will be liberalized. It also has implications for the 'export' of services under the categories of temporary workers identified in the **EPA, Title II, Chapter Four, Article 83).**

Analysis of these proxy estimates shows that females appear to dominate in all categories except engineering and entertainment. These categories of service workers are therefore likely to be negatively impacted by the liberalization of services which will result in nationals competing with EU personnel for various professional and other services.

**Table 4.11 ESTIMATES OF GENDER DISTRIBUTION IN SELECTED CATEGORIES OF TEMPORARY WORKERS UNDER THE EPA *(Title II, Chapter Four, Article 83)***

| **Categories of Temporary Workers under the EPA** ***(Title II, Chapter Four, Article 83)*** | **Male** | **Female** | **Female (%)** | **Total** |
|---|---|---|---|---|
| Accounting services | 570 | 1298 | 69 | 1,868 |
| Architectural services | 16 | 15 | 48 | 31 |
| Engineering services | 90 | 24 | 21 | 114 |
| Legal services (attorneys) | 13 | 47 | 78 | 60 |
| Medical services | 25 | 51 | 67 | 76 |
| Nursing services | 11 | 297 | 96 | 308 |
| Dental services(Dental Nurses) | 1 | 4 | 80 | 5 |
| Research and development services | 82 | 404 | 83 | 486 |
| Advertising and marketing services | | | | |
| Management consulting services | | | | |
| Fashion model services**** | 10 | 90 | 90 | 100 |
| Chef de cuisine services*** | 2,899 | 8,282 | 74 | 11,181 |
| Translation and interpretation services | | | | |
| Entertainment services* *(Theatre productions and ancillary theatre services, singer groups, individual musicians, bands and orchestras, dance instructors, discotheque and ball room productions, authors, composers, sculptors and other artists as well as other entertainers)* | 269 | 210 | 43 | 479 |
| Travel agency and tour guide services** | 8 | 51 | 86 | 59 |

*Sources: ESSJ, 2007 Section 22.23. Output of Professional Senior Officials and Technicians: 2005-2007, compiled from data supplied by the University of the West Indies University of Technology and other Tertiary Institutions.*

* ESSJ 2007: Section 22.24. Edna Manley College of the Visual and Performing Arts enrolment 2006/07.

**ESSJ 2007 Enrolment data and graduation at the UTECH School of Hospitality and Tourism Management.

*** ESSJ 2007: Section 22.19. Output of skilled and semi-skilled manpower by occupation. However this category includes cooks, waiters and other hotel personnel which are much broader than the skilled chef de cuisine services.

**** Telephone interview with Pulse Fashion Model agency March 18, 2009. This was an estimate on models.

The Services sector is important as it provides major inputs for the productive sectors (e.g. agriculture and manufacturing) and is also linked to all economic sectors. Services cover a range of activities: advertising, audio-visual services, banking and finance, communications, construction, data processing, education, environmental services, healthcare services, insurance, professional services, retail and wholesale trade, transportation and tourism. Services are also part of the general infrastructure e.g. transportation, telecommunications, utilities, and essential services such as water, energy and the internet (Randriamaro 2005: 24).[60]

A preliminary gender assessment of the winners and losers under the 29 designated sectors for temporary workers is guided by a review of gender differentials in education and certification.

Mode 4 workers in professional job categories that require tertiary education are most likely to be females (70%). They are the majority of graduates from public and private tertiary institutions compared to 30% of males. In 2007, tertiary enrolment in Jamaica was estimated at 65,872 (66% females). The output of Professionals, Senior Officials and Technicians for 2005-2007 from the University of the West Indies (UWI), the University of Technology (UTECH) and other Tertiary Institutions was 15,368 (4,669 males (30%) and 10,699 females (70%). (ESSJ 2007: 22:23).

Prevailing occupational stereotypes are still reflected in the sex distribution of graduates from UWI and UTECH, Jamaica's two longest standing tertiary education institutions. The average 70:30 ratio in favour of females at the UWI has existed for more than two decades.[61] However the gender imbalance is less pronounced at the University of Technology, which has Schools of Architecture, Building and Land Management, Business Administration, Hospitality and Tourism Management, Technical and Vocational Education, Computing and Information Technology, Engineering Pharmacy and Health Services and Science and Mathematics. At UTECH, in 2006/07, of a total of 1,591 graduates, 728 were males (46%) and 863 were females (54%). (ESSJ 2007:22.27).

Males dominate at the lower levels of education, and in Sports education. Some 51% were enrolled in programmes of the Jamaica Foundation for Lifelong Learning (JFLL) in 2007.[62] Males also dominated in registration at the GC Foster College of Physical Education and Sport: they represented 55% of the 533 students enrolled.

Females dominated in vocational training: 1,386 (60%) of graduates at the Vocational Training and Development Institute (VTDI), a tertiary level institution of the HEART Trust/NTA that is responsible for the professional development of technical and vocational educational and training instructors, managers and technicians.

Lessons for the EPA can also be drawn from current analysis of the Caribbean Single Market and Economy (CSME) by Leo-Rhynie (2008)[63]. She notes that men constitute less than one-third of the UWI graduate class and so the free movement of labour in the CSME will present a barrier to those men who would seek entry based on educational qualifications. She however notes that "men may be able to access the single market in greater numbers than women because of their skills in other approved categories and the possibilities of work in those categories". Bailey (2003) also

[60] Randriamaro, Z (2005) Gender and Trade: Overview Report. Brighton: IDS p. 24. http://www.bridge.ids.ac.uk/reports/CEP-Trade-OR.pdf
[61] Leo-Rhynie (2008) p. 313.
[62] Formerly JAMAL (the Jamaica Movement of the Advancement of Literacy)
[63] Leo-Rhynie (2008). In Hall and Chuck-A-Sang (2008) CARICOM Single Market and Economy Genesis and Prognosis Kingston: Ian Randle Publications. (Page 312).

reminds us that higher education of women has not translated into gender equality in the labour market.

The potential numerical impact of the temporary jobs available is expected to be limited, given the restrictions associated with eligibility and also because only 5% of the Jamaican population has a university degree or any professional certification. Benchmarking common education and professional certification may be time consuming and given the limited awareness of the EPA may take some time to be fully established in all the 29 categories. Building human capacity at lower levels of education and vocational training is necessary. This will develop a larger pool of nationals with the skills and aptitudes required for a more globally competitive workforce. This will also require higher levels of current investment in literacy and vocational programmes which may not be available in the current economic climate.

Girvan (2008)[64] cautions that under the 29 categories of services the opportunities for accessing temporary employment are subject to several conditions under Article 83:

- Individuals must be working with a firm with a service contract in an EU member state not exceeding one year's duration;
- Individuals must have at least 1 year's working experience with the supplying firm as well as 3 years' professional experience;
- With certain exceptions*, they must possess a university degree or equivalent qualification and professional qualification required in the receiving state. Mutual recognition agreements may be necessary;
- Their stay is limited to a cumulative period of six months in any 12-month period or duration of contract, whichever is less;
- Their access is limited to performance of their contract;
- The number is limited to what is necessary to fulfill contract as determined by local laws;
- Other 'discriminatory limitations' are allowed, including limitations on the number of employees permitted entry as a result of 'economics needs tests' in the receiving countries;
- Other conditions are specified in Annex 4.

In summary therefore, although there is a higher percentage of females than males graduating with degrees from tertiary education institutions and females are more likely than males to be eligible for most of the 29 categories of temporary workers in the EPA, there are several factors that may intervene.

The World Bank (2003) and other mainstream proponents of trade liberalization argue that increased competition will bring lower prices, increased choices, better quality service and the availability of specialty services to consumers (World Bank 2003 cited in UNCTAD 2004, cited in Randriamaro 2005: 24). Gender and trade specialists (e.g. Williams 2003a) and a wide range of development advocacy groups argue that the benefits are not equitable. The gender wage gap persists although women's wages may increase (Riddle and Springer 1988 cited in UNCTAD 2004). Jamaica's own

[64] Norman Girvan CARICOM's Single Development Vision and the EPA. "The Fork in the Road" ILO/CCL Round Table June 2008. See http://normangirvan.info.

experience with garment manufacturing in the Free Trade Zones in the 1980s pointed to investments that offered low wages, poor working conditions and job instability.

Randriamaro (2005) provides a clear analysis of the scenario related to “Trade in Services”, noting that there are four “Modes of Supply”. These provide an avenue for increased participation of women in the international trade in services. Mode 1 covers those services supplied from one country to another (e.g. telephone calls), while Mode 4 includes services provided by nationals outside of their own country. (e.g. teachers, nurses). Under Mode 4, women tend to be more involved in labour intensive services that require close proximity between providers and consumers. (e.g. health care domestic and social services), rather than in professional services (e.g. accountancy, engineering and management). (See Randriamaro (2005:26). Williams (2003a) outlines the scenario and concerns related to the privatization of services. Whereas proponents of liberalization argue that this will reduce the cost of services opponents raise the important issue of universal access to essential services that governments need to provide to citizens to meet their basic needs and rights such as water.

Oxfam (2008) notes that the EPA’s trade in services provisions is also a ‘death blow to development in the Doha Round, as least developed and developing countries are required to make commitments that go beyond existing GATS commitments in terms of opening and regulations. (Oxfam Briefing Paper “Partnership or Power Play?” 2008:10).

One World Action, the Commonwealth Secretariat, War on Want and the Caribbean Policy Development Centre are among the many institutions that have voiced concerns about the development impact of the EPA.

## 4.4. Summary of Expected Changes

Table 14.2 gives an overview of the expected changes across sectors with impact on gender, as a result of the EPA.

**Table 4.12 EXPECTED CHANGES FROM THE EPA BY SECTOR AND GENDER**

| Areas of Research | Likely Sectors to be Affected | Likely Gender Impact |
|---|---|---|
| ***Trade in Goods:*** | | |
| Likely changes in imports | *Manufacturing Sector:*<br>Cement, Textiles & Apparel | Large inflows of EU imports resulting in differential gender impact on the manufacturing sector are expected, with females being hardest hit in the textiles & apparel industry and males in the cement industry. |
| | *Mining Sector:*<br>Limestone, Gypsum | With the removal of tariffs (ranging from 20-25%) it is highly likely that the sector will experience an inflow of cheaper EU mining products resulting in a negative impact on the sector, especially for males who make up over 90% of the labour employed. |
| Likely changes in exports | *Agriculture*<br>Citrus, Yam, Cabbage, Carrot | Given the male-dominated nature of the agriculture sector, male farmers are expected to benefit the greatest from new export opportunities. However, crops like yam, cabbage and carrot, are important staples in female-led farming operations. To the extent that female farmers can access the necessary resources to increase production, they may also benefit from these export opportunities, albeit to a lesser extent. |
| | *Agriculture*<br>Sugar, Banana | Given the current international trade environment and inefficiencies in local production, it is not expected that the removal of trade quota for banana and the phasing in of DFQF access for sugar will positively impact these two industries. Job cuts associated with the further reduction of exports of these crops are foreseen. Both males and females will be affected as males primarily reap both crops (as well as toil in the processing of sugar) while females mainly work in the packaging, washing, etc. of banana. |
| | *Manufacturing*<br>Value-added sugar products & banana products | Possible opportunities to diversify out of these export crops into value-added products for sugar and banana so as to take advantage of previous trade restrictions, thereby creating employment opportunities. |
| ***Trade in Services:*** | | |
| Likely changes in imports | *Professional Services* (Females) | This is likely to be the greatest gender impact. Professionals and service providers from Europe can use the reciprocity clause to establish businesses, professional services in the areas identified in the Agreement (e.g. health, education, etc). This could undermine access to basic services which the government is obliged to supply to citizens as their right under CEDAW, CRC & MDG commitments etc. EU companies can invest/establish businesses to provide these services, which may not be accessible to the poorest (could include women in single female headed households and their families (47% of HHs); HIV positive persons; some disabled). Local professionals in other categories would have to compete with Europeans for jobs, contracts. While both M & F could be displaced, females dominate in the category of Professionals etc. and are most likely to be negatively impacted. |

**Table 4.12(cont'd) EXPECTED CHANGES FROM THE EPA BY SECTOR AND GENDER**

| Areas of Research | Likely Sectors to be Affected | Likely Gender Impact |
|---|---|---|
| ***Trade in Goods:*** | | |
| Likely changes in exports | *Professional Services* - Females<br>*Entertainers* – Males | For those categories of professional workers that require degrees, females are more likely than males to be able to take advantage of the temporary work opportunities. Sub-sectors dominated by males or by females may be able to use the opportunities but this is dependent on other restrictions outlined in the EPA.<br><br>Migration of skilled professionals if even for short periods is likely to further undermine national capacity to meet development goals in areas such as education and health, as already there is the out-migration of skilled professionals to the EU, and North America. |

## 5. Conclusions and Recommendations

### *1. Limited Initial Direct Immediate Impact*

The findings show that the majority of gender sensitive goods (as defined in this paper) are mostly excluded from tariff liberalization. Products with either zero-rated tariffs or low tariffs also represent the majority of the goods which are scheduled for immediate liberalization. Where these gender sensitive goods are scheduled for liberalization, the timelines for implementation are longer, thus allowing a few years for adjustment and preparation.

**Recommendation:** That the 'window' period of adjustment be used to mainstream gender in the implementation of the EPA in order to maximize its developmental impact.

### *2. Net Gender Impact of EPA Unknown*

The net gender impact of the EPA is unknown because of the absence of sex disaggregated data for some sectors. Assessments should therefore be conducted of current production processes in industries likely to be impacted (e.g. textiles, mining sector (cement) etc.) to identify policies, strategies and resources needed to make them more competitive. The history of poor working conditions in the EPZs in Jamaica in the textiles and apparel industries indicates that labour monitoring mechanisms will need to be strengthened to ensure that the ILO's Decent Work Agenda and other international labour standards and conventions to protect the rights of women workers (e.g. CEDAW) are respected.

**Recommendation:** That a national multi-sectoral, inter-institutional research project be organized to collect and analyse sex-disaggregated micro data on all economic sectors (productive, service, informal). The resulting electronic database would be accessible to support a more complete gender impact assessment to guide planning for various sectors.[65]

### *3. Limited Public and Sectoral Awareness of The EPA*

The study showed limited levels of awareness of the linkages between gender, trade and development in the main institutions responsible for negotiating and implementing the EPA as well as institutions and the public who will be impacted by the Agreement.

**Recommendation**: That a Gender & EPA sensitization and training module/programme be developed and delivered to the general public as well as key sectors to increase awareness. Gender should be mainstreamed in these sectors and groups and technical assistance should be expanded to address their needs. This

[65] The upcoming trade negotiations between Canada and CARICOM, can only serve to underscore the importance of addressing this issue.

support could be provided through collaboration with a team of gender and trade specialists drawn from the Institute for Gender and Development Studies at the UWI, the Bureau of Women's Affairs and the University of Technology. This would enable various sectors to better understand the inevitable changes and equip them to maximize opportunities under the EPA.

### *4. Weak Institutional Linkages between Institutions for Gender and for Trade*

The findings indicate that the links between the national institutions responsible for gender and for trade are weak. The EPA includes provisions for a Joint Consultative Committee on Trade and Development. The Committee has deliberative but not decision-making status. However, civil society representatives must be a part of this process to review social and economic and environmental agreements of the EPA to ensure their interests are addressed. Participants should also include women's NGOs, Consumer associations, women's NGOs, academics as well as specialists in the fields of gender, trade and economic development especially.

**Recommendation:** That inter-institutional linkages be strengthened by including a gender and trade policy specialist from the Bureau of Women's Affairs, in the Ministry's trade monitoring team to support gender mainstreaming in all future trade negotiations, as well as MFAFT policies and programmes.

### *5. Limited Capacity to Prepare for Adjustment*

The study showed that during the transition period, major adjustments will be required to take advantage of opportunities in the EPA. Among the many tasks are: updating and the harmonization of legislation and policies; and organizing training programmes to increase global competitiveness of various sectors. Funding the costs of this adjustment in the current global recession, fiscal challenges, high debt servicing and funding disaster recovery each year, will be a major challenge for the government and private sector.

Professional associations and business sectors that will be impacted will also need technical assistance to become compliant, certified and capable of meeting requisite standards required by the EPA. Women dominate in Micro, Small and Medium Enterprises and will therefore need special support, training, and finance to take advantage of emerging opportunities identified, to sell products and services in the EU.

Specific training opportunities need to be provided to prepare the workforce and also to reduce dislocation and unemployment risks. In terms of certification, women are already more likely to take advantage of education than are men. Areas for training and certification (which parallel the emerging opportunities) should be identified and existing programmes strengthened to be more sensitive to the certification needs of both men and women workers in the areas of opportunity.

**Recommendation:** That financial resources be identified to support adjustments and preparations for EPA implementation over the next decade. Introduction of gender-sensitive training and certification programmes for EPA-readiness. These special programmes should also facilitate market research and export assistance in order to facilitate penetration of the EU markets. Language skill training in English as a Foreign Language, and at least one or two other European languages is recommended to do business in the EU. Language classes will need to accommodate the schedule of working mothers.

### *6. Additional Research needed on the Fiscal Impact of the EPA*

Preliminary estimates of the fiscal impact of the EPA have been explored in this study. However, the available data for the analysis of the gender impact of the EPA has not facilitated an in-depth assessment of the fiscal impact of the EPA. Further research and analysis will be needed to determine more clearly how the Jamaican government plans to alter the pattern of consumption taxes in order to meet the inevitable shortfall in revenue to maintain social services expenditure at levels required to meet MDG targets and the Jamaica 2030 Development Plan. Consumer products may be available at lower prices, but the government may have to increase income and other taxes to compensate for the loss of trade tax revenue. Increasing taxes will have an impact on taxes for poor female headed households if the tax increase exceeds the fall in the price of the goods consumed, or if the goods that face an increase in consumer taxes are consumed disproportionately by women, whilst those that see a tariff removal are consumed disproportionately by men. The extent of the impact will also depend on the consumption patterns of these households as well as the types of replacement taxes implemented by the government.

The government's ability to make resources available to enable the private sector to become more globally competitive may be severely constrained by the loss of trade revenue. Additionally, this could therefore mean less money available for poverty reduction programmes, health and education despite the government's commitments to the poorest and most vulnerable including single female headed households in the poorest quintile.

**Recommendation:** That further research be carried out on the fiscal impact of the EPA, specifically focusing on measures that the government can implement in order to meet shortfalls in revenue, which do not disproportionately affect women. Another recommendation is for the continued restructuring of the country's tax regime and for impact assessments to be undertaken which examine how the social spending of the state will be affected (e.g. welfare programmes).

### *7. Potential Impact on the Public Sector*

To the extent that government is not able to find alternative sources of revenue, the loss of trade revenue is also likely to have a negative impact on public sector employment which is a female-dominated sector. Restructuring of the public sector to make it compatible and capable of meeting the demands of the EPA implies that some jobs will be lost while others will be gained but the net effect is difficult to determine. The dislocation for the public sector employees many of whom are single mothers will be significant. Those least educated are most likely to be lose their jobs. Those with requisite computer and other technical and professional skills are less vulnerable.

This suggests the need for career planning and development in the public sector, related to the EPA. One opportunity that women could consider is training for jobs that will be required in Customs and Excise as skills will be needed in understanding and applying EPA tariff rules. Technology skills are also likely to be needed to enhance trade competitiveness and efficiency. Overall there will be an increased demand for personnel with knowledge of EPA trade rules.

**Recommendation:** That appropriate monitoring mechanisms be put in place to assess the impact on employment in the public sector as a result of reduced trade revenue. This should also include the offering of training courses to retool dislocated public sector workers.

***8. Poverty Likely to be increased among Most Vulnerable Including Poor Single Female Headed Households in Poorest Quintile***

Some sectors are likely to prove globally uncompetitive and women workers are particularly vulnerable as they will more acutely feel the impact of job losses. Workers in the sector that are negatively impacted will need retooling, retraining and job placement to reduce the risk of poverty. Women in the informal sector need to be supported to cope with the adjustment.

**Recommendation:** That national poverty reduction programmes identify and support the most vulnerable groups in the population at risk of poverty. These include single female headed households, persons with disabilities and persons living with HIV and AIDS who are likely to face multiple forms of discrimination as jobs become more scarce.

***9. Monitoring Mechanisms need to be Strengthened and Engendered***

Mechanisms to monitor implementation of the EPA and assess the sectoral impact are currently inadequate and will need to be strengthened to determine the extent of the effects on women and men. This action would be consistent with Trade Defence Instruments[66] which can be used to limit the extent to which increased quantities of imports cause or threaten to cause:

i. serious injury to the domestic industry producing like or directly competitive products in the territory of the importing Party; or

ii. disturbances in a sector of the economy, particularly where these disturbances produce major social problems, or difficulties which could bring about serious deterioration in the economic situation of the importing Party, or

iii. disturbances in the markets of like or directly competitive agricultural products (1) or in the mechanisms regulating those markets.

(Chapter 2, Article 25: Safeguard Clause).

[66] See Chapter 2 of the EPA Text entitled “Trade Defence Measures” which speaks to Anti-Dumping and Countervailing Measures, Multilateral Safeguards and Safeguard Clause.

**Recommendations:** That monitoring groups be expanded to increase local expertise on gender and trade and that training in gender, trade and the EPA be provided to ensure that all members have a high level of detailed knowledge about the EPA. This will help to identify the conditions required to invoke the trade defence measures.

It is further recommended that a **gender-sensitive trade monitoring tool** should be developed to support the monitoring process and to assess the sectoral impact of the EPA. This tool would include questions that would be asked to guide proposed policies and programmes. It could help to minimize the potential negative impact of the EPA. Also it would help to strengthen information gathering systems by supporting the collection of gender disaggregated data on the sectors. In addition it would provide guidelines to assess the differential impact of a trade policy on men viz a viz women.

### *10. Tapping into the Diaspora through Market Research and Financial Resources*

In addition to the analysis of exports as covered in this report, it is important for market research to be carried out to determine the potential for specific products in the EU market as broadly identified in this report. Linking with the diaspora community in the target markets of the EU may provide well needed information on consumer demand and additional data for assessing the profitability of new ventures.

In terms of financial resources, research and data provided by the Planning Institute of Jamaica indicates that women remit more than men to household incomes. The cost of sending money from overseas to Jamaica is prohibitive. This is done through special remittance companies and more recently through banks and building societies. As such, measures to reduce the costs associated with remittances for Jamaicans living overseas, as well as from temporary workers who seek to take advantage of new service opportunities, may need to be examined.

**Recommendation:** That market research be undertaken in the EU to further assess the export opportunities of Jamaican products and services, and that this research engage the diaspora community. Another recommendation is for the government to consider strategies to reduce the cost of sending money home in anticipation of an increased range of skilled persons working in the EU and remitting their earnings to Jamaica.

### *11. Ongoing Research – EPA Gender Research Monitoring Policy Project*

The experience of conducting this research study, has highlighted the need to continue the analysis of the EPA as an on-going policy research project that would help to fill data gaps. Also, to undertake additional gender analysis of data to guide national and regional policies, programmes and plans to enhance the success of the EPA.

**Recommendations:** That an EPA Gender Research Monitoring Policy Project be implemented which has as its core functions: monitoring preparations for and implementation of the EPA; and publishing and disseminating findings in policy round tables, as well as on the worldwide web. This project could also be linked to graduate research programmes, development of new courses and the training of tertiary level students to become globally competitive. The research would fill much-needed data gaps on the impact of the EPA at household level, and on businesses of varying sizes owned and operated by men and women, as well as help to guide policies.

This could be a joint regional project with other CARIFORUM states conducted with a multidisciplinary team of researchers across research agencies in Jamaica and other Caribbean countries and Europe and indeed other developing countries impacted by the EPA. Tanzania and Mozambique would be obvious priorities having been part of this larger project. The team may include the University of the West Indies (Institute for Gender and Development Studies Mona Unit, Departments of Economics, Government and the Sir Arthur Lewis Institute for Social and Economic Research, the Planning Institute of Jamaica; the ODI, IDS, One World Action and the Commonwealth Secretariat.

Additional gender-sensitive impact assessment studies (as identified in the earlier recommendations), are some of the immediate tasks that could be undertaken by such an initiative.

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