

EXECUTIVE SUMMARY

ANALYSIS AND RECOMMENDATIONS FOR ENHANCING THE POLICY ENVIRONMENT

FOR BUSINESS AND EMPOWERING PRIVATE SECTOR ORGANIZATIONS

Prepared for:

**GUYANA BUILDING EQUITY AND ECONOMIC PARTICIPATION (BEEP) PROJECT
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I. INTRODUCTION

This executive summary presents the main findings from the general overview and analysis of issues in the two volumed report on the business policy environment and the institutional capabilities of the private sector organizations (PSOs) volume 1 and 2 respectively. The scope of work mandated the Consultants to produce outputs which revolve around: an indepth analysis of the business policy environment and the capabilities of the PSOs to play effective roles in serving their constituents and partnering with Government in promoting economic growth and development.

THE ANALYSIS AND RECOMMENDATIONS ARE OUTCOMES OF A BROAD BASED AND INDEPTH INTERACTIVE WORK APPROACH INVOLVING THE STAKEHOLDERS, THE CONSULTANTS' EXPERIENCE AND SOUND WORKING KNOWLEDGE OF THE COMPLEXITIES OF THE SOCIO-ECONOMIC LAND SCAPE OF GUYANA AND ITS MACRO-ECONOMIC PROGRAMS. For example:

- # The review process entailed structured data gathering interviews with private sector organization leaders and one commodity association. The Private Sector Commission (PSC), Georgetown Chamber of Commerce and Industry (GCCCI), Guyana Manufacturers Association (GMA), the Consultative Association of Guyanese Industries (CAGI), the Berbice Chamber of Commerce and Development (BCCD) and the Linden Chamber of Commerce and Development (LCCD), the Tourism Association of Guyana (TAG), and the Forestry Products Association (FPA) and with key policy development and management and business facilitation organizations such as: the Ministries of Finance, Education, Trade Tourism and Industry and the Public Service and Go Invest, Guyana Export Promotion Council (GEPC), the New Guyana Marketing Corporation (NGMC) and the New Guyana National Bureau of Standards (GNBS). We also gathered secondary data from World Bank, IMF, Bank of Guyana, Ministry of Finance and other reports.
- # The consultants facilitated two major workshops designed to achieve consensus on the issues strategies for improvements and priority options. The first workshop was for the PSOs. They brain-stormed the policy and institutional issues and determined the priority actions. The second workshop was an interactive session between the PSOs and the economic development support ministries and their organizations. This workshop succeeded in arriving at a consensus on the priority issues, strategies to address them, a list of actions that should be implemented, and an institutional framework for maintaining a PSOs-GOG Partnership to manage the implementation process.
- # The analysis and recommendations, apart from being driven by the consultants' analysis and PSOs-GOG consensus, have been also driven by a set of guiding principles: compatibility with the Guyana-IMF program, containment of fiscal expenditure, promotion of partnership between government and the private sector, maximizing opportunities for broad based participation in the economy, maximizing the use of private sector resources in economic modernization and empowering the private sector to become an effective *"engine of growth"*.

II. MAJOR FINDINGS

The findings will revolve around the economic structure and performance, policy initiatives and results, policy issues, the entrepreneurial landscape and institutional capabilities of the PSOs.

II.1 **GUYANA'S ECONOMY HAS PERFORMED IMPRESSIVELY AT AN AVERAGE OF APPROXIMATELY SIX PERCENT (6%) GROWTH RATE FOR THE PAST FOUR (4) YEARS PRIMARILY DUE TO TIGHT FISCAL MANAGEMENT A MAJOR PUBLIC SECTOR INVESTMENT PROGRAM, AND A STABILIZED FOREIGN EXCHANGE RATE. HOWEVER, IT WILL BE A REAL CHALLENGE TO SUSTAIN THIS RATE IN THE FUTURE - WHICH IS ESSENTIAL FOR REDUCING LARGE SCALE POVERTY AND IMPROVING THE GENERAL QUALITY OF LIFE - DUE TO THE FOLLOWING:**

- # Most of the present raw material driven exports do not have competitive advantage. They secure foreign markets mainly through preferential trade treatments which will be neutralized shortly.
- # There is no overwhelming response from foreign investors - actually per capita foreign investment is less than US\$60 in Guyana as against an average of approximately US\$350 in the Caribbean community around Guyana.
- # The infrastructural capacities - electricity, roads, water, airport, sea ports which are equal to, or less than the 1980 levels cannot sustain a six percent (6%) growth rate.
- # Government's economic support ministries and organisations such as: the Ministry of Finance, Ministry of Trade, Tourism and Industry, Go-Invest, GEPC, and GNBS do not have the requisite modernized systems and resources to facilitate the business community to be more responsive to the globally competitive environment.
- # The local business community is too leveraged (the debt:equity ratio clusters around 80:20) to become proactive.
- # The productivity of labour which is the lowest in CARICOM will continue to be a major threat until about seventy percent (70%) of the workforce get adequate training.
- # Strategically important service industries such as: engineering, business services, financial services, international transportation and telecommunications are underdeveloped.

II.2 **GOVERNMENT HAS INITIATED A WIDE RANGE OF POLICY INITIATIVES WHICH GO FAR BEYOND THE HARMONIZED INCENTIVES SCHEME IN CARICOM, TO PROMOTE INVESTMENT. HOWEVER, THEY HAVE NOT**

GENERATED ANY MAJOR DIVIDENDS AS CAN BE ASCERTAINED FROM FOREIGN AND DOMESTIC INVESTMENT PERFORMANCE.

- # Many of the policy contents are not compatible with the perceived needs of the business community and in many cases investors cannot benefit from them due to inadequate legal and institutional support. For example, removal of tax on dividends will not be effective until there is a developed capital market.
- # There is very little systems approach to managing the policies to ensure that they are effective and that policy resource allocations are rationalized. For example, there is no sectoral plan to focus resources on competitive subsectors, there is no major provision for partnership with the private sector in areas such as housing, technical education and health care; an excess of entities are mandated to facilitate business while none of them have the requisite level of resource support and expenditure on education is expanding in secondary where the investment has the lowest returns and contracting in primary education where the socio-economic returns are the highest.
- # The local private sector is at an extremely low state of readiness to respond to improved investment policies: they are highly leveraged, their strong preference for control through family ownership restricts them to conventional financing and deny them new opportunities such as: equity financing, ESOPs, venture capital, or joint venture, and most are inward looking instead of having global orientation in marketing.
- # Many of the emerging entrepreneurs are in disadvantageous positions, example former civil servants and bauxite employees, small scale rice farmers and interland residents.

II.3 **THE PSOs ARE TOO WEAK TO BE EFFECTIVE PARTNERS WITH GOVERNMENT FOR ECONOMIC GROWTH AND DEVELOPMENT AND GENERAL MOBILIZATION OF ENTREPRENEURSHIP**

- # The level of legal formal status is the only overall positive character about the PSO as 80% of them are legally established and have a constituted Board of Directors and a fixed business location.
- # Approximately forty percent (40%) have not satisfactorily fulfilled their fiduciary compliances, such as annual financial audits.
- # Management systems and procedures are generally weak, especially in terms of: financial administration, service delivery and data management.
- # The level of financial self-sufficiency is generally below 50% because they mostly rely on membership fee as their main source of income.
- # Some of them are not effective representative organizations: paid up membership is generally low, membership participation is minimal and there is very little organizational networking.

- # Client satisfaction is generally low because clients' service systems are inadequate.
- # The organizations do not have the requisite infrastructure such as: computing, communications and staffing to enable them to provide the required services to their members.

III. RECOMMENDATIONS

The recommendations set out below are based on the outcomes of the two workshops: the PSO and the PSOs-GOG workshops. They are designed to be compatible with the guiding principles set out in section 1 of this summary. In addition, they should address the key issues identified in the two volumes of the report: improving policy design and management, expanding business capacity cultivating a national entrepreneurial culture, improving the level of social awareness and partnership and enablement of the PSOs. The recommendations are along these lines are as follow:

III.1 GOG SHOULD IMMEDIATELY TAKE THE FOLLOWING STEPS TO IMPROVE THE COMPATIBILITY OF ITS POLICY DESIGN AND MANAGEMENT THROUGH THE FOLLOWING ACTIONS.

- # Modify new policy initiatives to match those identified. For example: make provisions for the option of freehold land tenure in the allocation of government land.
- # Consolidate NGMC, Go-Invest, GEPC and the Tourism Unit into a single entity to promote investment and trade and enable them with systems, personnel and training programs to ensure that they can meet the needs of the business community in a short turn around period.
- # Modernize government services to business and separate policy formulation from policy management to allow the political directorate to concentrate on formulation while the personnel concentrate on management.
- # Rationalize resource support in education to give greater emphasis on primary and technological education.
- # Develop and promote sectoral plan to give Guyana sound competitive positioning and to optimize the use of policy support resources.
- # Broaden the privatization program and investment incentives to include some critical economic support services so that they can access private funding to modernize them. Some opportunities include engineering service, technological education, ferry and port services, airport services, professional services and health care.
- # Create special incentives such as technical assistance training, access to market for government's goods and service for disadvantaged entrepreneurs such as: former civil servants, former bauxite employees, women, marginal rice farmers, and interland residents (especially Amerindians).

III.2 GOVERNMENT SHOULD EXECUTE THE FOLLOWING TO EXPAND

CAPACITY AMONG LOCAL BUSINESSES

- # Convert GNCB-GAIBank poor performing loan portfolio into equity on a venture capital bases.
- # Facilitate the opportunities for the private sector to access technical assistance grants for training and productivity improvement.
- # Mandate Go-Invest or the proposed consolidated investment and trade promotion agency to identify opportunities for franchising agreements with Guyanese entities and carry out a promotional program for it.
- # Provide policy support resources to strategic service industries which can play a tangible role in enhancing Guyana's competitiveness. Such services should include: telecommunications, engineering, professional services and transportation.
- # Accelerate development of the necessary framework for modernizing the capital market so that instruments such as investment bonds, mortgage bonds and products such as lease financing could be introduced.
- # Reduce the issuing of financial paper instruments at the central bank to allow for more creative financing in the capital market.

III.3 GOG AND PSO_s SHOULD JOINTLY PROMOTE A SOUND NATIONAL AND ENTREPRENEURIAL CULTURE THROUGH:

- # Co-hosting annual conferences on business outlook and opportunities.
- # Co-hosting annual conferences on global development and the strategic positioning that Guyana should secure.
- # Co-financing of entrepreneurship development programs at U.G, Guyana Management Institute and CAGI.
- # Offering special advisory services at the consolidated trade and investment promotion agency for disadvantaged businesses.
- # Chamber of Commerce and individual business sponsorship of entrepreneurial projects in primary and secondary schools.

III.4 GOG AND THE PSOs SHOULD ESTABLISH AND OPERATE A FORMALIZED PARTNERSHIP PROGRAM

Establish and operate a business enhancement council comprising government and private sector representatives from strategic organizations, locations and sector to review issues , developments and arrive at a consensus on solutions. The council's life should extend until the PSC becomes a truly representative body.

- # Launch and maintain a jointly sponsored social marketing program designed to promote opportunities, policy provisions and sources of help.

III.5 THE PSOs SHOULD INITIATE THE FOLLOWING ACTIONS TO PUT THEMSELVES IN A STATE OF READINESS TO BE TRULY REPRESENTATIVE, ELIGIBLE FOR TECHNICAL ASSISTANCE SUPPORT AND ACCREDITATION AS A MEMBER OF THE PSO NETWORK.

- # Formalize their institutions by having duly constituted Board of Directors, constitutions, a registered entities and persons identified as the legal caretakers.
- # Prepare full profiles of their constituencies i.e. geographical span, economic activities, social characteristics and hierarchy of the needs of the constituents.
- # Prepare lists of target members and a program for attracting them.
- # Prepare profiles of their memberships: names, addresses, economic activities number of persons employed.
- # Ensure that at least 85% of their members are in good standing with their membership dues.
- # Secure the services of professional Accountants to bring their books up-to-date.
- # Hold executive meetings and secure consensus on their general direction and produce the minutes.
- # The PSC should immediately assist in the formalization of PSOs. It will be beneficial to the former.

III.6 PSOs SHOULD PROCURE TECHNICAL ASSISTANCE SUPPORT FROM GOG, BEEP, OTHER DONORS AND THEIR COUNTERPARTS IN OTHER COUNTRIES IN THE FOLLOWING AREAS.

- # Development of team building within each PSO among the PSO and PSC.
- # Development of strategic business plan for the PSOs.
- # Institutional strengthening to enable the PSOs to manage all aspects of their operations.
- # Social marketing of programs designed to promote membership, entrepreneurship networking relations and service offerings.

IV. PROJECTIZED ACTION PLAN

Eighteen (18) projects have been identified for implementation over the immediate and medium term horizons to improve the investment policy environment, enable PSOs and formalize partnership between GOG and the private sector. The projects are:

1. Customer service culture and systems at IRD
2. Establishment and operationalization of consolidated agency
3. Investment code
4. GNBS institutional support
5. Development of subsector plans and strategic plan for country competitiveness
6. Establishment of National Housing Fund
7. Privatization of selected government business support service
8. GNCB-GAIBANK debt for equity (venture capital program)
9. GOG-PSO annual conference on global development and Guyana's positioning
10. GOG-Private sector technical training program
11. Facilitation of disadvantaged entrepreneurs
12. Service/knowledge capital industry development
13. Establishment of a business enhancement council (GOG-Private sector)
14. Social marketing program for consolidated promotional agency
15. Consolidated promotional agency-PSO overseas study tour

16. Team building process
17. Development of Business Plans
18. Institutional strengthening

Table-1 which follows summarises the projects in terms of name, range of outputs, justification and key inputs required.

TABLE I BRIEF ON OPPORTUNITIES FOR BEEP AND OTHER DONORS' INTERVENTION TO SUPPORT THE GUYANESE PRIVATE SECTOR

PROJECT TITLE	KEY OUTPUTS	JUSTIFICATION	KEY INPUTS REQUIRED
1. Customer service culture and systems at IRD	# Customer service manuals # Training # Systems # Systems integrated in information technology	Tax compliance will be higher. Tax payers will improved experience with IRD	# 4 person month of technical assistance with over 10 years customer service systems and staff development experience and a suitable Masters Degree
2. Establishment and operationalization of consolidated promotional agency.	# Institutional and legal framework # Service plan # Organizational structure # Staffing and job requirements # Job classification # Technical assistance program # Plant technology # Program development # Financing plan	More cost effective services will be provided. It will reduce fiscal burden on GOG. Entrepreneurs will find the arrangement more convenient and effective.	# 8 person months of expertise in: organization and development, strategic planning, investment and trade promotion and management systems. Each expert should have at least a relevant Masters Degree in Business.
3. Investment code	# Legal framework # Institutional framework # Incentives regime # Environmental standards # Operational framework	There will be more transparency. Investment promotion will be more autonomous.	# 2 person months of corporate legal expertise # 12 person months of investment policy expertise. Each expert should have at least 10 years experience

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PROJECT TITLE	KEY OUTPUTS	JUSTIFICATION	KEY INPUTS REQUIRED
4. GNBS Institutional support	# Organizational plan # Development plan # Service plan # Technical assistance # Cost recovery plan # Plant upgrading	Improved cost effectiveness Institutional sustainability Financial sustainability	# 4 person months of expertise in development of standards institutions. The candidate should have a Masters Degree in a Science and Technology discipline.
5. Development of subsector plans and strategic plan for country competitiveness	# List of strategic growth oriented subsectors # Strategic plan of action for competitiveness # Technical assistance program	This is necessary to rationalize the allocation of developmental and policy support resources in order to realize maximum socio-economic returns.	# 6 person months of industrial engineering # 4 person months of sectoral economists # 2 person months of a technologist Each expert should have 10 years experience and a Masters Degree.
6. Establishment of National Housing Fund	# Legal framework # Institutional framework # Financing plan # Service delivery mechanism # Social marketing plan # Feasibility analysis	A vehicle such as this is needed to mobilize financing for affordable housing for non-management and administrative, technical and operational personnel.	# 3 person months expertise in housing financing # 3 person months expertise in Economic and Finance # 3 person months expertise in institutional development
7. Privatization of selected government business support service	# Candidate list # Profiles # Privatization modalities # Cost benefit analysis	Government does not have the bureaucratic capacity or funding to modernize the delivery of its services.	# 4 person months of expertise in privatisation and commercialization. The expert should have at least 10 years experience and a Masters Degree.

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PROJECT TITLE	KEY OUTPUTS	JUSTIFICATION	KEY INPUTS REQUIRED
8. GNCB-GAIBANK debt for equity (venture capital program)	# Analysis of default profile # Analysis of selected clientele # Legal framework # Debt for equity transactions	Many large business cannot recover due to the debt burden and the banks are not collecting on the loans.	# A risk management expert for 3 person months. He/she should have professional training in banking with 10 years related experience.
9. COG-PSO annual conference on global development and Guyana's positioning	# Review of developments, issues, opportunities and challenges # Consensus on options for Guyana # Consensus on strategic positioning for Guyana.	Government and the private sector to have solid insights of global development and opportunities to shape national strategies.	# One facilitator/expert on global development and strategies # Promotional material # 6 resource persons # A marketing program
10. COG-Private sector technical training program	# Training needs assessment # Training delivery mechanism # GOG-Private sector institutional framework # Financing # Start-up plans # Financing models # Feasibility analysis # Business plan	At least 70% of the operating and technical workforce are not adequately trained in the jobs they are assigned.	# 4 person months of institutional development expertise # 6 person months of technical and vocational training and education expertise # 2 person months of economics and financial expertise Each expert should have at least 10 years experience and a Masters Degree.

TABLE I BRIEF ON OPPORTUNITIES FOR BEEP AND OTHER DONORS' INTERVENTION TO SUPPORT THE GUYANESE PRIVATE SECTOR

PROJECT TITLE	KEY OUTPUTS	JUSTIFICATION	KEY INPUTS REQUIRED
11. Facilitation for disadvantaged entrepreneurs	# Legal and institutional mechanism # Entrepreneurial development programs # Mechanism for participating in supply government with goods and services.	Thousands of individuals laid off from the civil service and the bauxite industry became entrepreneurs without any prior mainly because they had no alternative.	# 2 person months of investment policy expertise with experience in entrepreneurial development # Promotional material # The person should possess a Masters Degree
12. Service/Knowledge capital industry development	# List of strategic services # Strategic policies to promote investment # Promotional and support programs	Knowledge capital industry for and a range of strategic business support services are still at the infancy stage in Guyana.	# 4 person months of service industry development expertise # The person should possess 10 years related experience and a Masters Degree.
13. Establishment of a business enhancement council (GOG-Private Sector)	# Council mandate # Institutional structure # Membership # Social marketing of the council	This will alleviate the present fragmented working relationship between PSC, PSOs and the GOG and act as a stop gap until the PSOs are strengthened.	GOG and private sector initiative spearheaded by the Ministry of Finance and promotional program.
14. Social marketing program for consolidated promotional agency	# Program design # Delivery mechanism # Financing mechanism # Implementation plan # Promotional material	There is a major information gap between PSOs, Psc, and government ministries regarding policies, program strategies, opportunities and available service.	# 4 person months of social marketing expertise # A public education program jointly sponsored by GOG-PSC

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PROJECT TITLE	KEY OUTPUTS	JUSTIFICATION	KEY INPUTS REQUIRED
15. Consolidated promotional agency-PSO overseas study tour	<ul style="list-style-type: none"> # First hand insights on PSOs in operation # Exposure to various institutional and financing models # Exposure to private sector - government relation models 	Both the private sector and government administration have limited exposure to PSO development and business government partnership.	<ul style="list-style-type: none"> # A 10 day tour to selected agencies across USA for 14 persons. # An end of tour seminar for PSOs.
16. Team building process	<ul style="list-style-type: none"> # Consensus on role for PSO, PSOs and community boards # Procedure for managing relations with Government # Arrangements for representation # Process for managing collaboration # Managing disputes # Membership relations # Consensus building 	The PSOs and PSC are not working as a team and on a disjointed basis they have not been able to participate as an effective private sector partner with Government.	<ul style="list-style-type: none"> # Two workshops facilitated by a team building consultant. # A Team building consultant to manage the process over a four week period. # Overseas observation study tour.
17. Development of Business Plans	<ul style="list-style-type: none"> # Target clientele # Service focus # Marketing and public relations strategies # Organisation and staffing # Investment and financing # Financial sustainability strategy 	Most PSOs do not have plans hence they are not able to mobilize or optimize resources.	<ul style="list-style-type: none"> # 1.5 person months of organizational development expertise # 1.5 person months of private sector development expertise # 0.5 person months of financial expertise.

TABLE I BRIEF ON OPPORTUNITIES FOR BEEP AND OTHER DONORS' INTERVENTION TO SUPPORT THE GUYANESE PRIVATE SECTOR

PROJECT TITLE	KEY OUTPUTS	JUSTIFICATION	KEY INPUTS REQUIRED
18. Institutional strengthening	# Operations manual for: Financial administration Service delivery Customer service Communication General management Board of directors # Trained executive directors # Trained secretaries # Trained pso board members	# Most PSOs do not have these operating guides. # The PSOs are fairly new and therefore have very little experience. # PSOs will need to have good systems to be eligible for external support.	# 3 person months of organizational development specialist # 2 person months of private sector institutional development specialist

V. PSOS-GOG CONSENSUS ON PRIORITY ACTIVITIES

V.1 PSOs AND GOG AT THEIR JOINT WORKSHOP REACHED A CONSENSUS ON THE PRIORITY POLICY ACTIONS WHICH SHOULD BE INITIATED IMMEDIATELY TO IMPROVE THE INVESTMENT CLIMATE.

They are:

- # Facilitate freehold land tenure in the present land policy.
- # Carry out the necessary legal and institutional reforms to facilitate modernization of the capital market in the areas of merchant banking, debt of equity swaps, lease financing, equities and venture capital.
- # Establish a single organization for investment and trade promotion and secure technical assistance to enable it to carry out its mandate.
- # Prepare and introduce an acceptable investment code.
- # Promote private investment in economic infrastructure and some government services which can be commercialized.
- # Concentrate policy development and management in the hands of the political directorate and civil service personnel respectively.
- # Introduce policies to support the advancement of disadvantaged groups in business especially small scale rice farmers, interland residents (mostly Amerindians), former civil servant, former bauxite employees in Linden, women and youths.

V.2 PSOs AND GOG HAVE AGREED TO IMMEDIATELY IMPLEMENT SIX (6) PROJECTS FROM THE RECOMMENDED LIST: Namely:

- # Preparation of an Investment Code
- # Development of subsector plans and strategic plans for the competitiveness of Guyana.
- # Establishment of a Private-Public Sector Housing Fund to finance affordable housing.
- # Execution of a Public-Private Sector technical and vocational training program.
- # Establishing a framework for facilitating disadvantaged entrepreneurs.
- # Development and implementation of a social marketing program to promote awareness of opportunities, policy framework and entrepreneurial initiatives and government and PSO support programs.

V3. THE PSOs-GOG WORKSHOP AGREED TO ESTABLISH A NATIONAL COUNCIL FOR ENHANCEMENT OF BUSINESS TO SPEARHEAD THIS PARTNERSHIP INITIATION.

The main functions of the Council will be:

- # Further the work of this initiative
- # Ensure that the priority action plans are implemented without delay
- # Promotion and enhancement of the GOG-PSOs partnership
- # Promotion of PSOs-PSC relationship
- # Promotion of the PSOs-GOG partnership to the public

The representatives on the Council should be drawn from all PSOs, the Rice Producers Association, the Forestry Products Association, the Ministry of Finance, the Ministry of Trade, Tourism and Industry and the Ministry of Education and the Ministry of the Public Service and/or their agencies.