



Government of Sri Lanka

NATIONAL EXPORT STRATEGY OF SRI LANKA

2018-2022



The National Export Strategy (NES) of Sri Lanka is an official document of the Government of Sri Lanka

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The National Export Strategy (NES) of Sri Lanka was developed on the basis of the process, methodology and technical assistance of the International Trade Centre (ITC) within the framework of its Trade Development Strategy programme.

ITC is the joint agency of the World Trade Organization and the United Nations. As part of the ITC mandate of fostering sustainable development through increased trade opportunities, the Chief Economist and Export Strategy section offers a suite of trade-related strategy solutions to maximize the development payoffs from trade. ITC-facilitated trade development strategies and road maps are oriented to the trade objectives of a country or region and can be tailored to high-level economic goals, specific development targets, or particular sectors.

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The views expressed herein do not reflect the official opinion of ITC. Mention of firms, products, and product brands does not imply the endorsement of ITC. This document has not been formally edited by ITC.

The **International Trade Centre (ITC)** is the joint agency of the World Trade Organization and the United Nations

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Government of Sri Lanka

NATIONAL EXPORT STRATEGY OF **SRI LANKA** 2018-2022



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MESSAGE BY HIS EXCELLENCY THE PRESIDENT OF SRI LANKA

The world economy has profoundly changed in recent years, presenting new opportunities as well as challenges for Sri Lanka. The Government of Sri Lanka is geared towards creating an enabling environment to strengthen the competitiveness which is a key driver to achieve inclusive and sustainable growth of Sri Lankan exporters.

Exports contribute substantially to the Gross Domestic Product (GDP) of Sri Lanka which signifies that developing exports is an effective method to develop the economy. Despite many constraints and challenges confronted by Sri Lankan exporters, the resilience shown by them to sustain growth in exports is indeed commendable.

Sri Lanka is a leading producer of many traditional and non-traditional products in the world. However, recognizing the changing paradigm in the international trade and Asia becoming the growth centre in the world economy, it is important for the country to diversify its product basket with new and innovative products to suit the fast changing pattern.

In line with the Government's vision of "building of a sustainable Sri Lanka, where everybody will share its dividends", I strongly believe the National Export Strategy (NES) will support the strengthening of the livelihood of all stakeholders in the export supply chain while creating increased wealth for the nation.

I sincerely appreciate the work of all the stakeholders who were involved in the process of formulating the National Export Strategy (NES).



Maithripala Sirisena
President of Sri Lanka

MESSAGE BY THE HONOURABLE PRIME MINISTER OF SRI LANKA

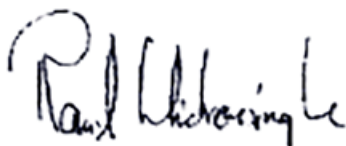
A comprehensive National Export Strategy (2018–2022) will be launched to address Sri Lanka's growth constraints. This strategy will witness a transformation in the economy, with a per capita of USD 5,000 per year, a million new job opportunities, Foreign Direct Investments of USD 5 billion and with USD 28 billion export earnings by the year 2022. These intermediate targets of the Government's economic vision – Vision 2025 – will ultimately make Sri Lanka an upper - middle income country.

Sri Lanka has a strong potential to enhance its external trade performance since our brands are increasingly associated with high quality and ethical manufacturing practices. In addition to the mature export sectors of apparel, tea, rubber and coconut, exports of services such as ICT, tourism and logistics have grown significantly in the last decade. These sectors have proven their ability to diversify and access new market destinations.

The National Export Strategy (NES) focuses on re-engineering the processes of reducing the cost of doing business and increasing enterprise competitiveness for improved institutional coordination, streamlined administrative procedures and digitisation of trade related processes. The strategy also considers the private sector will lead the development of exports, critical for the development of Sri Lanka.

The success of the NES relies on the ability of all public and private stakeholders to coordinate activities, monitor progress and mobilise resources. It is crucial for the public and private sectors to define the NES implementation modalities and "Quick Win" activities to build momentum for implementation.

I am confident that the National Export Strategy will provide Sri Lanka with the impetus and guidance to realise the country's potential and drive the nation towards achieving the target of USD 28 billion in export earnings by the year 2022.



Ranil Wickremesinghe
Prime Minister of Sri Lanka

MESSAGE BY HONOURABLE MINISTER OF DEVELOPMENT STRATEGIES AND INTERNATIONAL TRADE

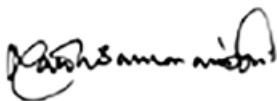
Economic development is an urgent priority of the Government of Sri Lanka. The economic strategy presented in the “Vision 2025”, policy framework includes a new approach to growth, based on the principles of a social market economy, which will seek to foster innovation and entrepreneurship to facilitate skill-based technological change as a driver of productivity and economic growth in the new global economic landscape.

The Ministry of Development Strategies & International Trade is focused on identifying and implementing policies that will create an enabling environment for trade to realise US\$ 27 bn. in export revenue by the year 2022. The National Export Strategy (NES) intends to provide the necessary direction to facilitate achieving key economic targets. The NES is a comprehensive document formulated through extensive public, private stakeholder consultations and addresses national issues of the policy and regulatory framework, export diversification, innovation, market entry, compliance, and trade and logistics hub.

The NES consolidates national level findings and priorities into a coherent roadmap to achieve Sri Lanka’s export vision: “Sri Lanka an export hub, driven by Innovation and Investment”. This vision is guided by four strategic objectives, they are; creating a predictable and transparent policy and regulatory framework, drive export diversification through innovation, strengthening emerging export sectors by improving market entry and compliance capacities, and to be an efficient trade and logistics hub.

The strategy consists of a Plan of Action for each sector and a framework to monitor the implementation to reach the expected outcomes. My Ministry will give the highest priority for the implementation of NES, based on the actions proposed of which a few have already been included in the National Budget 2018.

I appreciate the commitment of all stakeholders in preparing the National Export Strategy and take great pleasure in presenting this important document. I sincerely believe that the NES will be a key guide in the future course of action by all stakeholders when developing exports. Let us work together to realise a better future for Sri Lanka with economic development at the forefront, through increased export earnings by building capacity, facilitating advancement and creating opportunities in the years to come.



Malik Samarawickrema
Minister of Development Strategies & International Trade

MESSAGE BY HONOURABLE STATE MINISTER FOR INTERNATIONAL TRADE

I have great pleasure in sending this message for the occasion where the EDB, together with the Ministry of Development Strategies & International Trade and the private and public sector stakeholders with the technical assistance from the International Trade Centre (ITC), Geneva, has formulated the National Export Strategy (NES) for Sri Lanka. We all witness today, a long felt need of the country becoming a reality.

As the National Export Strategy has been formulated with close consultation of all the stakeholders, every aspect for developing exports including minute details and concerns to be addressed to reach the country's export goals have been very carefully looked into in this process. I am very much happy to be associated with the development process of NES as the Navigator and as a stakeholder.

Exports are the mainstay of the national economic prosperity, contributing substantially to the GDP while generating foreign exchange earnings, resulting greater asset utilization and job creation. When Sri Lanka's exports are compared with those from the rest of the world and particularly, from the countries in our neighbourhood, it is observed that, in spite of many comparative advantages present, there had not been, in the past, adequate progress in the field of exports reflecting a decline in export contribution to the country's GDP. The National Export Strategy has been formulated to fast track the country's export growth harnessing all capabilities and resources of the country.

Having a strategy along would not produce tangible results. The implementation on the lines recommended in the NES is of paramount importance to achieve the set export objectives and it could only be achieved through concentrated, focused and committed efforts of all the stakeholders. As the Navigator of the NES, a responsibility is incumbent upon me to make sure effective implementation. I am happy to mention that the NES implementation is already in progress with the establishment of sector specific Advisory Committees and the Government has recognized the importance of NES and budget allocations have been made for the identified activities of the priority sectors in the National Budget 2018.

I convey my gratitude to all stakeholders for their participation and providing enormous contribution in the NES formulation process with their expertise and particularly, the ITC team, for the guidance and the technical support extended in developing the NES.



Sujeewa Senasinghe
State Minister of International Trade

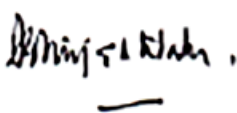
JOINT MESSAGE BY THE PRIVATE SECTOR CHAMBERS AND ASSOCIATIONS

A significant challenge faced by the export sector of Sri Lanka is to adopt initiatives that are compatible with global developments so as to improve performance. Therefore a more conducive environment and strategy for exports to thrive, was sorely needed. A strategic orientation coupled with a participatory approach towards export development has been a high priority that the private sector desires. It is in this context that we welcome the National Export Strategy (NES).

The strategy formulation process saw the adoption of a participatory approach and transparency and this ensured that the views of the private sector were incorporated at each stage of the process. These positive features lend to the acceptance by the Private Sector of ownership for the strategy along with the Public sector finally creates the National Strategy.

The NES provides a strategic orientation for Sri Lanka to achieve the dual objective of an export led economic growth trajectory and in making Sri Lanka a regional hub of value-added exports. This aligns well with the strategic objectives highlighted by the New National Trade Policy of Sri Lanka and the Vision 2025 articulated in the Policy Statement of the Government.

There will be significant challenges in the implementation phase. The private sector is happy to confirm its pledge to stay vigilant and provide the necessary support to the relevant implementation agencies to ensure that the objectives set out in the NES are achieved and that Sri Lanka realizes the vision of becoming an “Export Hub Driven by Innovation and Investment.”



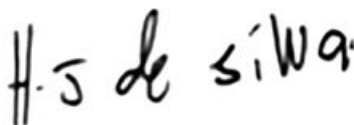
Ms. Dhara Wijayatilake
CEO,
Ceylon Chamber of Commerce



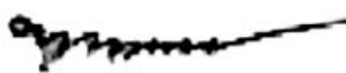
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Federation of Chambers of
Commerce and Industry
of Sri Lanka



Mr. Harin Da Silva
President,
Exporters Association of Sri Lanka



Mr. Sujeeve Samaraweera
President,
National Chamber of Commerce

MESSAGE BY AMBASSADOR – EUROPEAN UNION DELEGATION TO SRI LANKA AND THE MALDIVES

The story of Sri Lanka's economic development over the last few years has been very positive. The European Union has partnered with Sri Lanka for decades through humanitarian assistance and post-tsunami support, and later through development cooperation. The National Export Strategy is a part of the comprehensive 'EU-Sri Lanka Trade Related Assistance Project'—a EUR 8 million project initiated on a request made by the Sri Lankan Government. Opportunities provided by the new and dynamic global trading environment have fuelled the need for Sri Lanka to formulate policies that centre on assisting trade and improving competitiveness. Trade is one of the most sustainable methods to reduce poverty and drive development.

In Sri Lanka, as in many other countries, micro, small, and medium-sized enterprises are vital to the overall growth of the country, contributing to over 70% of GDP. Medium and small enterprises, which account for a vast majority of jobs and businesses, are an important test for checking the country's economic growth and resilience. The aim of this strategy is to pool together lessons learnt to shape a future where small and medium-sized enterprises can benefit from trade export. The National Export Strategy combines learning from the past, while exploring the future and its inherent unpredictability. I hope this Strategy will help Sri Lanka to move forward with a clear purpose, promoting linkages between various sectors and diversifying its export basket and target markets.

I also take this opportunity to acknowledge the leadership and ownership shown by the Government of Sri Lanka in the production of this strategy. The implementing partners of the EU-funded project, ITC and UNIDO, have also been instrumental in bringing together expertise and knowledge as well as identifying the steps to promote Sri Lankan trade.



H.E. Tung-Lai Margue
Ambassador
Delegation of the European Union to Sri Lanka and the Maldives

MESSAGE BY EXECUTIVE DIRECTOR OF INTERNATIONAL TRADE CENTRE

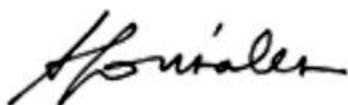
Sri Lanka is on the cusp of transforming its export industry through the implementation of a National Export Strategy (NES). The visionary, pragmatic and realistic recommendations of the NES will improve the operating environment for all SMEs, develop incubating conditions for innovation, enhance capacities for investment promotion, as well as expand Sri Lanka's established excellence of products and services to greater heights.

This NES is not merely a document that outlines recommendations, it is a holistic and deep rooted process driven by the knowledge and experience of more than six hundred entrepreneurs, industry leaders and heads of prominent public & private sector institutions. It is a truly national endeavour to harness the trading capacities of Sri Lanka and make it a bright beacon of competitiveness and openness in the Indian Ocean.

The commitment of the Government of Sri Lanka and the private sector to implement this key reform agenda has been visibly established since the inception of the NES design process. Financial allocation in the national budget of 2018 for the NES, highlights the earnestness of the Government for fast tracked implementation. The official appointment of Advisory Committees to coordinate the implementation process reaffirms the dedication of public and private partners to work hand in hand in building Sri Lanka, as the next regional trade hub.

In addition to this, the operationalisation of a dedicated management unit to coordinate and set out annual work planning confirms the importance of the NES in Sri Lanka's development agenda. Most importantly, the involvement of regional representatives in the design and implementation processes ensures that the benefits of the NES will respond to localised requirements and impact the lives of men and women from all corners of Sri Lanka.

The NES is a living document that will stay relevant and vibrant to guide national economic development. ITC will continue to work with Sri Lanka to ensure that the NES objectives are attained rapidly to create a fresh era of prosperity and growth for its people.



Arancha Gonzales
Executive Director
International Trade Centre

NOTE TO THE READER

Sri Lanka's NES was developed based on a participatory approach during which over 500 Sri Lankan industry leaders, small business owners, public sector representatives and academics held consultations to reach consensus on key sector competitiveness issues and priority activities. These inclusive platforms were held throughout the country, including in Jaffna, Galle and Kandy.

Besides in-depth research and value chain analysis, these consultations were complemented by:

- **Factory visits** through which supply chain assessments were carried out to gain further knowledge on key issues such as quality procedures, technical skills, lean management, quality of raw materials, access to market, etc.
- **Interviews with domestic, regional and international buyers** to guide the NES with strategic insights and market intelligence as well as buyers' requirements in terms of quality standards, food safety, packaging, buying cycles, distribution channels, prices, etc.
- **Donor sensitization** to identify synergies with ongoing/planned initiatives of development partners to eventually result in collaboration during the implementation phase.

The NES is aligned to Sri Lanka's development policy framework and will contribute to achieve the ambitions of Vision 2025 and the New Trade Policy (NTP). Vision 2025 of the Government of Sri Lanka, crystallizes the objective of Sri Lanka to finally transition to an export-led era. Vision 2025 references the NTP as well as the NES as the main tools towards the transformation of Sri Lanka into a regional hub of high-value exports.

The principal outputs of the NES Sri Lanka design initiative are endorsed, coherent and comprehensive export strategy documents with five-year detailed Plans of Action (PoAs) and implementation management frameworks. These documents include:

1. A main NES document (the present document) which contains the overarching national analysis. The NES design process provided the rationale for the selection of focus sectors and trade support functions (TSFs) based on ability to achieve the vision. The NES diagnostics highlighted key national priorities for improved competitiveness, such as a streamlined institutional and regulatory framework, export finance and improved trade promotion. The **main NES** aggregates and consolidates national priorities as well as major high-level priorities from each sector/TSF into a coherent framework.
2. Individual NES priority sector strategies and TSFs packaged as separate documents but in alignment with the main NES findings and overarching strategic objectives. The **stand-alone sector and TSF strategies** focus on their industry-specific priorities but also highlight cross-sector priorities such as access to technology, development of industry clusters and linking industry to academia. These cross-sector priorities are integrated in the main NES.

NES Sri Lanka	Main NES document <ul style="list-style-type: none"> • The umbrella document with national priorities and the main NES PoA (this document).
	Individual TSF Strategy documents: <ul style="list-style-type: none"> • Trade Information and Promotion • National Quality Infrastructure • Logistics • Innovation and entrepreneurship (designed separately) • Separate strategy documents and five-year PoAs were developed for each of the above priority TSFs.
	Individual NES priority Sector Strategy documents: <ul style="list-style-type: none"> • Information Technology–Business Process Management (IT–BPM) • Boating Industry • Wellness Tourism • Spices and Concentrates • Processed Foods and Beverages • Electrical and Electronic Components • Separate strategy documents and five-year PoAs were developed for each of the above priority sectors.

ACKNOWLEDGEMENTS

The NES of Sri Lanka was developed under the aegis of the Ministry of Development Strategies and International Trade (MoDSIT) and the Sri Lanka Export Development Board (EDB), with financial support from the EU as part of the 'EU–Sri Lanka Trade-Related Assistance: Increasing SMEs' Trade Competitiveness in Regional and EU Markets' project.

The document benefited particularly from inputs and guidance provided by the members of the public and private sector community that steered the formulation of the NES. A NES Core Team was set up to lead the NES design process. Core Team members are listed below.

NES Core Team

Name	Designation	Institution
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Mr. Shantha Bandara	Secretary	Ministry of National Policies & Economic Affairs
Mr. M.I.M. Rafeek	Secretary (Retired)	Ministry of National Policies & Economic Affairs
Mr. K.D.N. Ranjith Asoka	Secretary	Ministry of Industry & Commerce
Mr. Bandula Wickramaarchchi	Secretary	Ministry of Primary Industries
Mrs. Dharshana Senanayake	Secretary	Ministry of Development Assignments
Mrs. Indira Malwatte	Chairperson & CE	Sri Lanka Export Development Board
Dr. P. Nandalal Weerasinghe	Deputy Governor	Central Bank of Sri Lanka
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Ms. Tharangani Wickremasinghe	Additional Secretary – Development	Ministry of Plantation Industries
Mr. K.A. Vimalenthirarajah	Director General	Department of Trade and Investment Policy
Mrs. Sonali Wijeratne	Director General	Department of Commerce Sri Lanka
Mrs. Shobini Gunasekare	Director General (Economic Affairs)	Ministry of Foreign Affairs
Mr. S. Rajendran	Additional Director General	Sri Lanka Customs
Mr. Duminda Ariyasinghe	Director General	Board of Investment
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Name	Designation	Institution
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Mr. Jayantha Karunaratne	Chairman	Tea Exporters' Association
Mr. Suresh Silva	Chief Executive Officer	Silver Mill Holdings Limited
Mr. Prabhash Subasinghe	Chairman	Sri Lanka Association of Manufacturers and Exporters of Rubber Products (SLAMERP)
Mr. Ramal G. Jasinghe	President	National Chamber of Exporters
Dr. Arul Sivagananathan	Chairman Emeritus	Sri Lanka Association of Software & Service Companies (SLASSCOM)
Mr. Ruwindu Peiris	Chairman	Sri Lanka Association of Software & Service Companies (SLASSCOM)
Mr. M.P.T. Cooray	Secretary General	Joint Apparel Association Forum (JAAF)
Mr. Rohan Masakorala	President	Hub Operators Association of Sri Lanka
Mr. Suresh D. Mel	Managing Director & Manager / Board Member	Lanka Fishing Flies (Pvt) Ltd & Hambantota District Chamber of Commerce
Mr. D.A. Perera	Chairman	Spice Council
Mr. Sarada de Silva	Founder & Past Chairman	Spice Council
Mr. Harin de Silva	Chairman	Exporters Association of Sri Lanka
Mr. Shiran Fernando	Chief Economist	Ceylon Chamber of Commerce (CCC)
Mr. Sean Van Dort	The Past Chairman	Shippers Council
Mr. Mahesh Amalean	Chairman	MAS Holdings (Pvt) Ltd
Mr. Ashroff Omar	Chief Executive Officer	Brandix Lanka Ltd.
Mr. Dilhan Fernando	Chief Executive Officer	Dilmah Tea
Mr. Fazal Mushin	Chief Executive Officer	Greenfield Bio Plantations (Pvt) Ltd
Mr. Keerthi Bandara	CFO/Executive Director	Camso Loadstar Sri Lanka Association of Manufacturers and Exporters of Rubber Products (SLAMERP)
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Mr. Deshal de Mel	Economic Advisor	Ministry of Finance
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Mr. Anushka Wijesinha	Adviser	Ministry of Development Strategies & International Trade
Dr. Ravi Ratnayake	Member- National Trade Negotiation Committee	Ministry of Development Strategies & International Trade
Mr. K.J. Weerasinghe	Chief Negotiator - National Trade Negotiation Committee	Ministry of Development Strategies & International Trade
Mr. Ajith Gunawardena	Adviser	Ministry of Development Strategies & International Trade
Dr. Arittha Wickramanayake	Member- National Trade Negotiation Committee / Precedent Partner, Nithya Partners	Ministry of Development Strategies & International Trade

NES Core Team - Alternates and Special Advisers

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Mr. Viran Fernando	Assistant Director	Board of Investment
Ms. Jeevani Siriwardena	Director General	Sri Lanka Export Development Board
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Mr. Alexi Gunasekera	Deputy Director	Department of Commerce
Mr. H.M.B. Herath	Director of Commerce	Department of Commerce
Mr. Anil Sirimanne	Assistant Director	Department of Commerce Sri Lanka
Ms. Kishani Wickramasinghe	Asst. Director of Commerce	Department of Commerce Sri Lanka
Dr. Janaka Wijayasiri	Research Fellow	Institute of Policy Studies
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Mr. C. Murage	Deputy Director	Department of Trade and Investment Policy
Mr. T. Shumps	Chairman-Shums & Co. Ltd	Exporters Association of Sri Lanka
Mr. U.G. Ratnasiri	Additional Secretary - Economic Affairs)	Ministry of National Policies & Economic Affairs
Mr. G.W. Kularathne	Assistant Director	Ministry of National Policies & Economic Affairs
Mr. R.H.W.A. Kumarasiri	Additional Secretary	Ministry of National Policies & Economic Affairs
Ms. Amila Nawaratne	Additional Secretary	Ministry of Development Strategies & International Trade
Mr. W.A.D.S. Gunasinghe	Additional Secretary	Ministry of Development Strategies & International Trade (MODSIT)
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Name	Designation	Institution
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Mrs. Sithara Khan	Director General (Economic Affairs Division)	Ministry of Foreign Affairs
Mrs. H.H.N.P. Hewarathna	Assistant Director	Ministry of Foreign Affairs
Mr. T.D.S.P. Perera	Additional Secretary-Administration & Finance	Ministry of Industry & Commerce
Ms. T.M.B. Manike	Director	Ministry of Industry & Commerce
Mrs. Ishani Aberathna	Director (Research Development)	Ministry of Industry & Commerce
Dr. Kumudini Gunasekare	Agri Business Specialist	Ministry of Primary Industries
Mr. Shiham Marikkar	Secretary General/CEO	National Chamber of Exporters
Mr. Eranda Fernando	Consultant	National Chamber of Exporters
Mr. Haridhu Abeygoonaratne	General Manager	Sim Centric Technologies (Pvt) Ltd.
Mr. Darshan Cooray	Executive Director Emeritus	Sri Lanka Association of Software & Service Companies (SLASSCOM)
Mr. Ashique Mohamed Ali	Board Representative - Technology Forum	Sri Lanka Association of Software & Service Companies (SLASSCOM)
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A full list of public and private stakeholders that contributed their precious time to the design of the NES can be found in appendix 1.

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ACRONYMS

The following abbreviations are used :

ASYCUDA	Automated System for Customs Data	MoDSIT	Ministry of Development Strategies and International Trade
B2B	Business-to-business	MoF	Ministry of Finance
BOI	Board of Investment of Sri Lanka	MoNPEA	Ministry of National Policies and Economic Affairs
BPM	Business process management	MoPS	Ministry of Ports and Shipping
CAB	Conformity assessment body	MUSSD	Measurement Units, Standards and Services Department
CBSL	Central Bank of Sri Lanka	NCE	National Chamber of Exporters of Sri Lanka
CCC	Ceylon Chamber of Commerce	NES	National Export Strategy
CSC	Committee on Singapore's Competitiveness	NQC	National Quality Council
DoC	Department of Commerce	NQI	National Quality Infrastructure
EDB	Sri Lanka Export Development Board	NTP	National Trade Policy
EEC	Electrical and electronic components	PoA	Plan of Action
EU	European Union	R&D	Research and development
FDI	Foreign direct investment	SLAB	Sri Lanka Accreditation Board
GDP	Gross domestic product	SLSI	Sri Lanka Standards Institution
GI	Geographical indication	SME	Small and medium-sized enterprise
I&E	Innovation and entrepreneurship	TSF	Trade support function
IP	Intellectual property	UNIDO	United Nations Industrial Development Organization
IT	Information technology	WB	World Bank
ITC	International Trade Centre		
ITI	Industrial Technology Institute		
LCL	Less than Container Load		
MCC	Multi-cargo consolidation		



EXECUTIVE SUMMARY

Connecting Asia to both Europe and Africa, Sri Lanka is well-positioned to participate fully in global production networks and export to billions of consumers, both regionally and beyond. The increasing sophistication of Sri Lankan processing techniques, the fast growth of the services industry and the emergence of visionary industries are contributing to making the country the next trade hub of the Indian Ocean.

The NES is a timely catalyst through which the export sector will be reshaped. The NES is aligned to Vision 2025 and the NTP, and all aim to stimulate growth and job creation by improving the ability of firms to export and compete in foreign markets. The NES builds on consensus from the entire export community about the upcoming tasks and the heaviest roadblocks to be dislodged. It defines a detailed road map for faster export growth and acknowledges that things need to be done differently to increase the contribution of trade to economic development.

The time to transform the export sector is now. The current wave of economic reforms for a more transparent and flexible business environment, combined with increasing regional trade opportunities and major transformations in production techniques, provide a unique window of opportunity

for Sri Lanka to modernize and start a new cycle of export growth. The NES will enable the country to realize its full potential as an inevitable regional trade hub and a beacon of trade openness.

Sri Lanka now has the opportunity to catch up to fast-growing Asian exporting countries. Although positive trends in the past five years have stimulated export growth, key upgrades are required to reverse the long decline in share of exports to gross domestic product (GDP). Currently, Sri Lankan export engines rely on a blend of traditional industries and growing services sectors. The NES will empower the emergence of new champions beyond the traditional export industries of apparel, tea, gems and rubber. High tariffs, complicated administrative procedures and challenging access to inputs will be addressed to favour the growth of higher-technology and knowledge-intensive exports, which are less vulnerable to cost shifts. NES implementation will address major systemic issues hindering the rapid expansion of Sri Lanka's exports.

To seize the window of opportunity, Sri Lanka's NES proposes a clear-cut strategic orientation to drive the reforms needed for Sri Lanka to reach its potential.

NES: A top-down and bottom-up process that consolidates national and sector priorities into a comprehensive implementation framework.

The NES design process rationale for selection of focus sectors and TSFs was their ability to achieve the vision. The NES diagnostics highlighted key national priorities for improved competitiveness, such as a streamlined institutional and regulatory framework, export finance and improved trade promotion. The main NES aggregates and consolidates national priorities as well as major high-level priorities from each sector/TSF into a coherent framework.

The stand-alone sector and TSF strategies focus on their industry-specific priorities but also highlight cross-sector priorities such as access to technology, development of industry clusters and linking industry to academia. These cross-sector priorities are integrated in the main NES.

VISION AND STRATEGIC OBJECTIVES

Through an inclusive and consultative process, Sri Lanka's industry leaders and public sector representatives defined the following NES vision:

This vision is underlined by four national objectives, which provide the overall framework for the prioritization of reforms, institutional alignment, market development and the selection of focus sectors and TSFs.

“ Sri Lanka – an export hub driven by innovation and investment ”

Our export development **vision**:

‘Sri Lanka: An Export Hub Driven by Innovation and Investment’

Guided by four **strategic objectives**:

To have a business enabling, predictable and transparent policy and regulatory framework that supports exports

To strengthen Sri Lankan exporters' market-entry and compliance capacities

To become an efficient trade and logistics hub to facilitate exports

To drive export diversification through innovation and by strengthening emerging sectors

Improved business environment for **all export sectors** through:

Logistics

Trade Information and Promotion

National Quality Infrastructure

Innovation and Entrepreneurship

Six **focus sectors** for innovation and export diversification:

IT-BPM

Wellness
Tourism

Boat
Building

Electrical and
Electronic
Components

Processed
Food and
Beverages

Spices and
Concentrates

STRATEGIC OBJECTIVES

1. To have a business-enabling, predictable and transparent policy and regulatory framework that supports exports.

The private sector, including small and medium-sized enterprises (SMEs), considers this objective fundamental to address challenges faced by Sri Lankan enterprises, reduce costs of doing business and improve export competitiveness. It focuses on re-engineering processes for improved institutional coordination, streamlining administrative procedures and deepening the digitization of trade-related processes.

To achieve this objective, the main NES PoA favours the establishment of an institutional public and private coordination mechanism for trade policy design, formulation and execution. This key action aims to increase transparency and coordination between key partners to avoid ad hoc policymaking and duplication of efforts.

This objective equally prioritizes updating Sri Lanka's regulatory environment by amending and reviewing a number of regulations –including the Quarantine Law, Customs Act and import regulations– to streamline trade procedures and allow the country to become an effective trade hub. The gazetting of the Electronic Transactions Act or the amendment of the Board of Investment (BOI) Law will reinforce the attractiveness of the country as an efficient place for doing business.

This objective also highlights the need for improved export finance and insurance solutions, and recommends increased involvement of the private sector in trade negotiations.

2. To strengthen Sri Lankan exporters' market-entry and compliance capacities.

This strategic objective focuses on strengthening two key TSFs that deliver trade information and promotional support, and quality compliance services, both necessary to increase exporters' performance in destination markets. The improvement of the trade information and promotion function and the strengthening of the National Quality Infrastructure (NQI)¹ will benefit SMEs, emerging exporters and mature export industries of Sri Lanka.

1.– A stand-alone NQI Strategy was developed on the basis of the National Quality Policy –approved by the Cabinet in November 2016, the Sri Lanka NQI Gap Assessment completed by the World Bank, and the technical guidance of UNIDO. The NQI Strategy was designed with the technical assistance and methodology of ITC.

The trade information and promotion priorities of the NES strive to improve data collection, analysis and dissemination between key institutions –such as EDB, the Department of Commerce (DoC), the Central Bank of Sri Lanka (CBSL), private sector chambers and others– in order to create a unique platform for exporters to easily access relevant, up-to-date and affordable market intelligence. This objective equally strives to focus trade promotion efforts in line with industries' priorities by increasing engagement with trade missions, creating a genuine Sri Lankan brand, and ensuring exporters' brands are protected by strengthening targeted intellectual property (IP) processes.

The strengthening of the NQI function will give national institutions increased ability to effectively support SMEs' and exporters' compliance with market requirements and standards. The NQI Strategy provides an actionable road map to implement the National Quality Policy and improve coordination between the Sri Lanka Standards Institution (SLSI); Measurement Units, Standards and Services Department (MUSSD); Sri Lanka Accreditation Board (SLAB); Consumer Affairs Authority, conformity assessment bodies (CABs) and other institutions responsible for ensuring quality of products. This objective will also make testing, adherence to standards and traceability more affordable and accessible, thereby contributing to better protection of Sri Lankan consumers as well as market entry for exporters.

3. To become an efficient trade and logistics hub to facilitate exports.

This objective is critical for Sri Lanka to become a recognized hub serving Asia and the world. It aims to create the conditions for Sri Lanka to leverage its enormous shipping and logistics potential by strengthening its infrastructure, improving services and attracting the investment and skills required for sustainable growth.

This objective will be achieved through a dual approach of increasing transshipment, multi-cargo consolidation (MCC) and commercial hub activities for international shipments; simultaneously ensuring improved services for Sri Lanka's own transport and exports of goods. A key focus of the Strategy is reforming the logistics ecosystem by adjusting key regulations such as the Sri Lanka Port Authority Act, the Electronic Transactions Act and Commercial Hub Regulations to favour increased sophistication and quality of services. The NES also recommends provision of adequate facilities, such as warehouses, bonded logistics centres and common user facilities, as well as improved rail connections between ports and airports, in order to increase storage capacities, facilitate e-commerce operations, attract more transshipment and increase overall capacity.



Photo: © advantis.world

The achievement of this objective depends and builds on Sri Lanka's World Trade Organization trade facilitation obligations implemented by the National Trade Facilitation Committee and supported by various development partners. Recognition of Sri Lanka as a logistics hub depends partly on the implementation of a single window system, the rolling out of e-payment solutions and the efficiency of border agencies.

4. To drive export diversification through innovation and by strengthening emerging export sectors.

This strategic objective will create the conditions and implement targeted solutions to develop visionary and emerging export sectors. Established export sectors such as apparel, tea, rubber and coconut products have proven their ability to compete in world markets.² While these mature sectors are the backbone of Sri Lanka's export performance, enablement and strengthening of new industries is a priority to enable faster export growth.

2.– These sectors are driven by strong private sector ownership and built on the sectors' competitive advantages. The rubber sector has the *Sri Lanka Rubber Industry Master Plan 2017–2026* and the textiles sector is developing its own new sector strategy. Other important sectors with high export potential, such as fisheries, are already receiving support to develop strategically.

In order to capitalize on the potential of these emerging export sectors, the NES focuses on implementing vital national solutions, while equally targeting industry-specific interventions. This dual approach to sector development ensures that all priority actions –including regulations, industry coordination and market development– are properly addressed to drive growth in each priority sector. The NES focuses on reinforcing new export industries by proactively improving the provision of skills to support these industries' growth; attracting investment, technologies and knowledge into these promising sectors; and supporting integration of SMEs from across Sri Lanka into the export value chain.

Innovation is critical for the diversification of Sri Lankan exports. Because innovation creates effects beyond the export sector, an independent working group of public and private stakeholders was appointed by the Prime Minister to design a stand-alone strategy for innovation and entrepreneurship (I&E).³ The implementation of this I&E Strategy will support the NES priority to reorient research and development (R&D) and innovation to support the needs of emerging export sectors.

3.– The I&E Strategy of Sri Lanka was developed independently of the NES, by MoDSIT, with technical assistance from the World Bank. The NES and I&E Strategy jointly contribute to build innovation in exports and entrepreneurship of SMEs.

TRADE SUPPORT FUNCTIONS

While the NES provides the conditions to enable diversification by strengthening emerging sectors, all export industries of Sri Lanka will benefit from the increased performance of key TSFs. TSFs target key horizontal dimensions of trade that affect the national business environment and competitiveness of exporting sectors. Improving TSFs will facilitate doing business for all Sri Lankan enterprises. Better TSF efficiency is essential to increase the abilities of infant industries over time so that they can become visionary export sectors in the next NES.

Four TSFs were shortlisted by public and private stakeholders to achieve the NES vision and strategic objectives: Trade Information and Promotion, NQI, Logistics, and Innovation and Entrepreneurship. The main NES document integrates major recommendations from individual TSFs. However, each TSF has a stand-alone strategy that outlines its specific needs and the changes necessary for improved performance.

NES FOCUS SECTORS

The focus sectors provide a good mix of industries with different growth trends, yet ensure the NES remains focused to achieve the key objective of export diversification during its five-year implementation period. The focus sectors were identified based on quantitative and qualitative parameters derived from export potential assessments, conducted by EDB and BOI under the guidance of Harvard University, as well as studies by the Commonwealth Secretariat, McKinsey, the World Bank and ITC. These export potential assessments were then complemented by qualitative criteria, such as socioeconomic contribution, spillover potential and environmental sustainability. Sri Lanka Cabinet of Ministers formally validated the focus sectors selection on 14 July 2017.

Focus sectors	Type of industry	Growth trend
IT-BPM	Services	Mature
Wellness tourism	Services	Emerging
Spices and concentrates	Agriculture	Mature
Boating industry	Manufacturing	Visionary
Processed foods and beverages	Agriculture	Emerging
Electrical and electronic components (EEC)	Manufacturing	Visionary

Each NES focus sector possesses a stand-alone export strategy determining the industry-specific requirements for sustained industry development and export competitiveness.

PLANNING NES IMPLEMENTATION SINCE DAY ONE

The NES ensures the translation of priorities into implementable actions. The implementation of these priority actions through an efficient coordinated framework will drive reforms, optimize institutional structures and strengthen private sector capacities to respond to national, regional and global market opportunities.

Trade competitiveness cuts across ministries, national agencies, subnational institutions, industry associations and private sector organizations. Hence, without transparent national public-public as well as public-private coordination for trade development, the envisaged improvements will not be achieved and export competitiveness will continue to underperform. As such, an effective governance mechanism for implementing NES recommendations aims to ensure that implementation responsibilities are assigned

effectively, resources used efficiently, transparency of information leads to accountability, and key public-private operators support implementation.

The responsibility for implementation rests with leading national institutions identified in the NES PoAs. Public and private representatives have identified one responsible public or private institution responsible for implementing each NES priority activity. Public institutions have been consulted to integrate NES priorities into their annual planning cycle and national budget proposals. Planning units of the Government will refer to the NES PoAs for guidance in programming. Private sector institutions will implement their own NES priorities, as the private sector is the greatest beneficiary of NES implementation.

The 2018 National Budget has allocated resources to national institutions to fast-track implementation of NES priorities. Quick-win activities ranging from regulatory upgrading, enabling SME participation in exports, strengthening visionary sectors and increasing promotion of Sri Lankan products were prioritized for rapid implementation. This confirms the Government's commitment to rapidly transform and upgrade Sri Lanka's export sector.⁴

In order to fast-track implementation, it was essential to ensure the necessary conditions for implementation and coordination were rapidly operational. With this in mind, the Government and private sector representatives have agreed on a NES governance structure that became operational in early 2018.

The NES implementation and coordination mechanisms will support and guide implementing partners in programming and delivery of priority projects. A coherent and resourced coordination structure will ensure that national trade development efforts do not occur in isolation and are aligned to priorities defined by national policymakers and industry

4. – The list of 2018 National Budget proposals contributing to NES implementation is in appendix 2.

stakeholders. The implementation structure did not require regulatory or legislative amendments; it works within the existing legal framework of Sri Lanka.

Export advisory committees, composed of private and public sector representatives, are mandated to steer the development of a specific export industry in a strategic manner. The Export Development Act (1979) grants EDB the following power: 'On advice from the Board, the Minister may by Order in the Gazette establish advisory committees for the development and promotion of certain products, product groups and commodities as well as functional aspects of trade'.

Export advisory committees were revamped, reorganized and given further influence by the Government to strategically guide their industry's development. The Committees were operational in early 2018 and are already guiding the implementation of their respective sector or TSF strategy.

A NES Management Unit is operational to coordinate and monitor implementation of the NES. The NES Management Unit reports to the Secretary of MoDSIT and is primarily responsible for ensuring the PoAs adopted under the NES are implemented in a timely and effective manner.

A key NES priority – a formal high-level trade council

A key recommendation of the vast majority of the 556 participants of the NES design process was to *(re)establish a high-level formal public-private council responsible for coordinating all trade development interventions, including the NES, and reduce duplications among trade-related institutions.* (see main NES PoA – 1.1.1).

The membership is to be appointed in a transparent manner. The high-level trade council is to be chaired by the President/Prime Minister. Its key objective is to reduce ad hoc trade policymaking and oversee the implementation of trade-related initiatives.

WHAT WILL THE NES BRING TO SRI LANKAN CITIZENS?

Implementing the NES will create sustainable and fast export growth for the benefit of all Sri Lankans.

- The NES will unlock the development of nascent export sectors, thereby **providing entire new job opportunities.**
- The NES will put in place all conditions required for existing value added industries to boom through exports, **favouring retention of value in the country and generating new skills locally.**
- The NES will **facilitate the entry of SMEs into exports** by easing bureaucratic procedures and through targeted support, including trade finance solutions.
- The NES will allow **Sri Lanka to become a regional trade hub**, which will attract foreign investment to the country and spur economic development.
- The NES will **ensure inclusion of regions** by connecting all initiatives to local production centres.
- The NES will **streamline legal and administrative procedures**, reducing complexity for businesses to operate.

SETTING THE STAGE FOR AN EXPORT-LED ERA

SRI LANKA HAS SUCCESSFULLY UPGRADED ITS ECONOMY

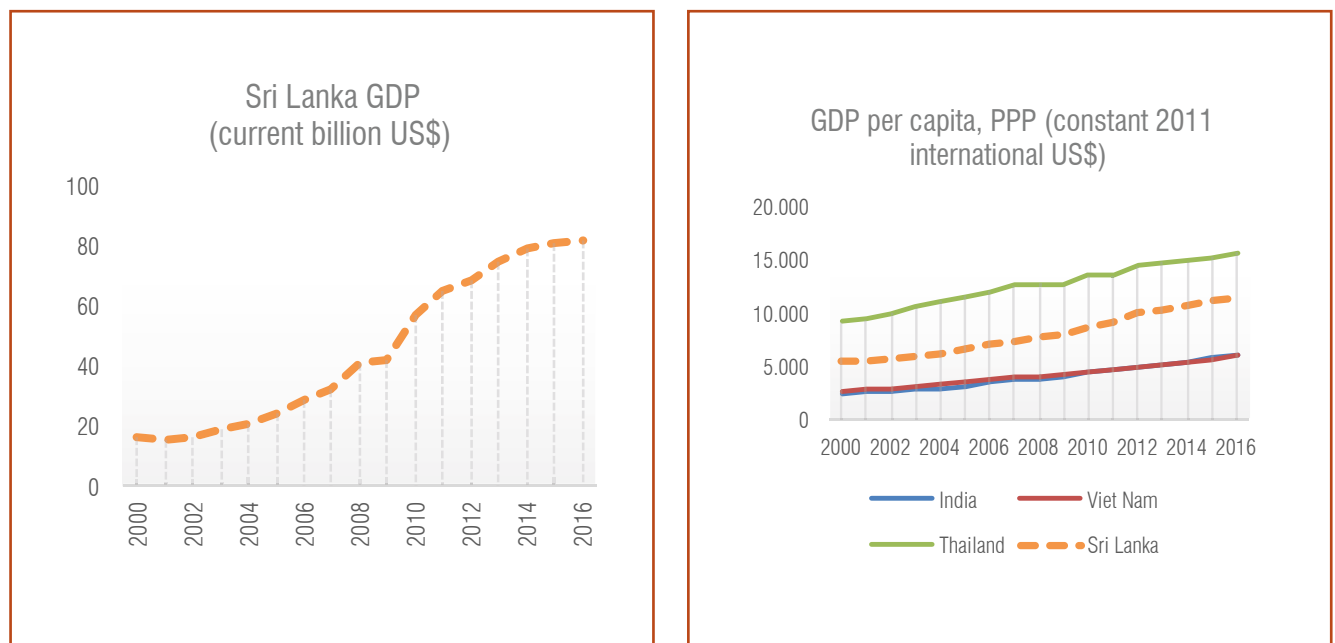
Sri Lanka's economy has been through a major upgrade. Over the last decade, Sri Lanka created employment, lifted millions of people out of poverty and unified the country to build continued growth. An average real GDP growth of 6.5% during the period 2009–2013 has made Sri Lanka one of the fastest-growing countries in Asia.⁵ While Sri Lanka's economy is still relatively modest in comparison to others in the region, it has a higher GDP per capita than

countries such as Viet Nam and India. Having become a middle-income country, Sri Lanka aims to become a higher middle-income country through sustainable economic growth.⁶

5.– ITC calculations based on World Bank data, 2017.

6.– World Bank (2015): *Sri Lanka – Ending Poverty and Promoting Shared Prosperity. A Systematic Country Diagnostic*. Washington, D.C., p. 11. Available from <http://documents.worldbank.org/curated/en/714211468189526474/Sri-Lanka-Ending-poverty-and-promoting-shared-prosperity-a-systematic-country-diagnostic>.

Figure 1: Sri Lankan GDP and GDP per capita, 2000–2016



Source: ITC calculations based on World Bank data, 2017.



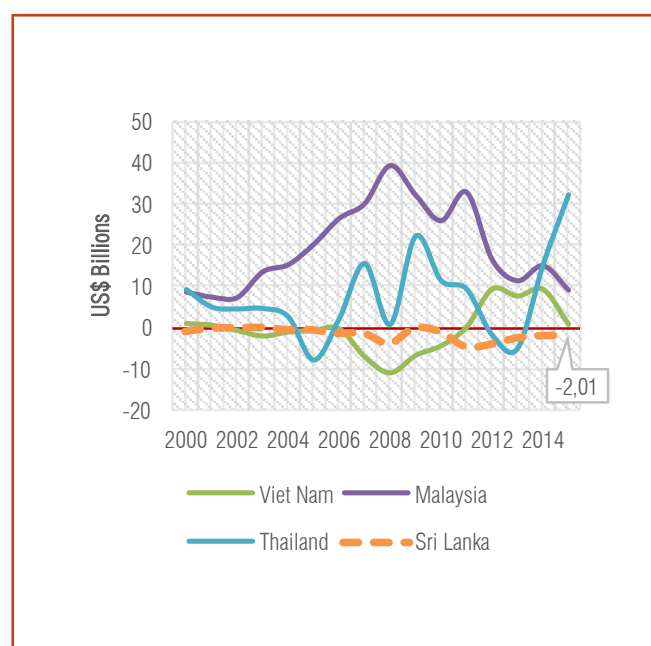
Photo: ITC

Although Sri Lanka has experienced rapid growth and reduced poverty, the engines that pulled the economy have started to falter, pointing to a pressing need for replacement. Between 2013 and 2016, annual real GDP growth slowed to an average of 4.4%.⁷ This slowdown can be explained by the nature of the components of the previous growth. Since 2000, Sri Lanka's economy has been led by

7.— ITC calculations based on World Bank data, 2017.

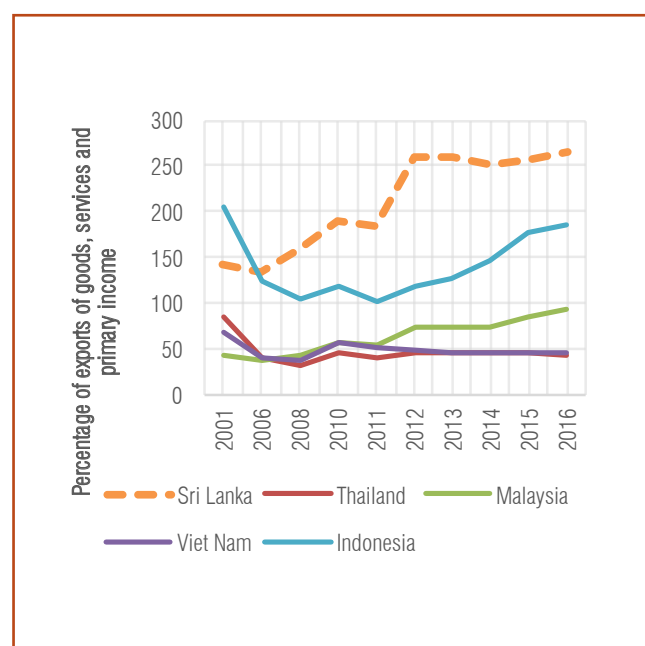
an increase in domestic consumption, as well as the growth on non-export industries such as construction and public sector spending. The slowdown of economic growth clearly demonstrates that domestic demand cannot be the only source of growth, especially considering the limited size of the domestic market. Another key indicator is the current account deficit of the balance of payments, which has been negative since 1975, and amounted to negative US\$2.01 billion in 2015.

Figure 2: Sri Lanka's current account balance compared with regional peers, 2000–2014 (US\$ billions)



Source: ITC calculations based on World Bank data, 2017.

Figure 3: Sri Lanka's external debt ratio compared with regional peers, 2001–2016 (per cent)



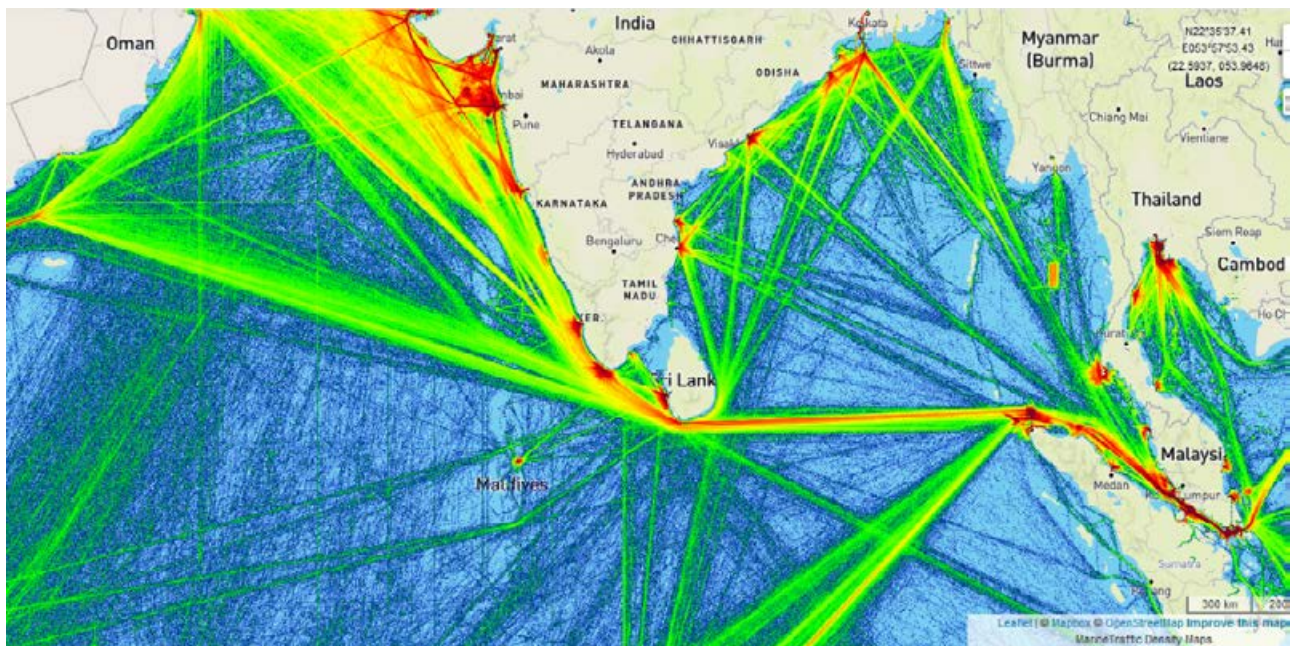
Expansion of high-value exports emerges as an inevitable path for Sri Lanka to achieve its sustainable growth goals.

Trade and current account deficits, as well as the reliance on high levels of foreign borrowing can mainly be addressed through increasing export revenues. Higher export revenues are a solution to increase Sri Lankan resilience in regard to its foreign liabilities, as well as to stabilize exchange rate fluctuations. Besides these considerations, increased trade revenues have the potential to generate investment inflows into new areas and new technologies, increase productivity, create jobs and strengthen the skills of the Sri Lankan labour force.

The strategic location of Sri Lanka at the crossroads between the area covered by the South Asian Association for Regional Cooperation and South-East Asia, the fastest-growing regions in the world, gives the country all the right conditions for exports to boom and for the country to become a beacon of openness.

Sri Lanka is close to many emerging markets and is already an important transshipment hub for the region. Previous sector development was mainly concentrated on hard infrastructure –driven by many government policies and support from international partners– including projects such as the Urban Transport Master Plan for Colombo Metropolitan Region and Suburbs, megaprojects like the development of the Mattala Rajapaksa International Airport and Hambantota Port, and national master plans for ports, railways and roads.

Figure 4: Shipping density in the Indian Ocean



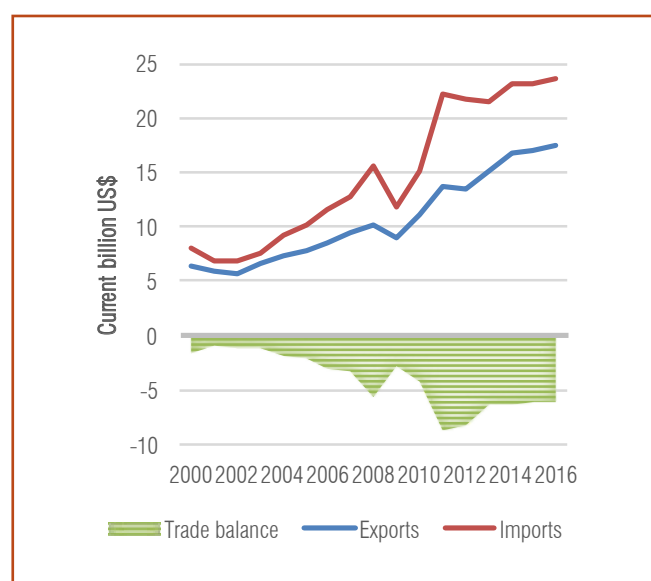
Source: Marine Traffic Density Map (2017).

Although Sri Lanka has taken a major socioeconomic leap over the last decade, GDP growth was mostly driven by public sector expenditure and domestic consumption. Trade has made a limited contribution to this growth, which suggests that the traditional growth engines are no longer sustainable. The country needs to revise its growth development strategy for the future.

THE NEXT ECONOMIC UPGRADE WILL COME FROM TRADE

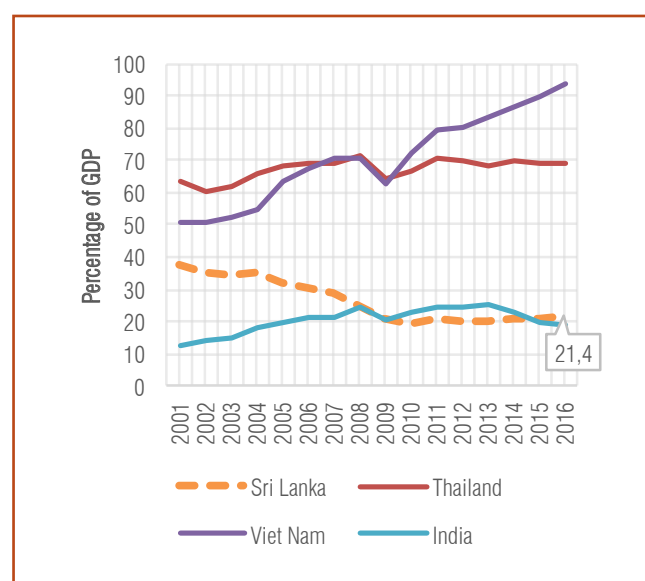
Although Sri Lanka has traditionally been an import-dependent insular economy, exports have started showing positive trends over the past five years. Over the last decade, exports of goods and services grew by an annual average of 7.4%, reaching US\$17.4 billion in 2016. Imports growth over the same period was slightly lower at 7.3%, which is a hint towards a change in trade balance trends.

Figure 5: Sri Lankan trade in goods and services, 2000-2016 (US\$ billions)



When comparing Sri Lanka's export growth to the region, the country's performance has improved. The only neighbouring countries reaching higher export growth rates were Viet Nam and India, with 15.5% and 8% respectively. Indonesia and Malaysia's exports of goods and services only grew at 4.6% and 1% respectively.

Figure 6: Trade to GDP regional comparison, 2001-2016 (percentage of GDP)



Source: ITC calculations based on Comtrade and World Bank World Development Indicators data, 2017.

However, these positive signs are counterbalanced by the fact that export growth starts from a very low base. Sri Lanka remains a marginal exporter in the region, with a world export share that stagnated between 0.08% in 2001 and 0.07% in 2016. Other economies, such as India, Thailand, Indonesia and Viet Nam, have successfully increased their export share during the same period, while already starting with a much higher share of world exports.

The trade deficit has also remained unchanged and has even been aggravated, leading to accumulation of the debt required to finance the balance-of-payments shortfalls. Sri Lanka's trade balance deficit remains substantial, and increased from US\$0.7 billion in 2001 to US\$8.9 billion in 2016.⁸ This led to a rise in the ratio of debt to exports

from 141% in 2000 to 265% in 2016.⁹ While neighbouring countries such as Viet Nam, Thailand and Indonesia have succeeded in reducing their external debt ratio since 2000, Sri Lanka has become the country with the greatest debt to export ratio in South Asia.

Another warning sign when it comes to export growth is the continuously decreasing contribution of exports of goods and services to Sri Lanka's GDP, from 39% in 2000 to 21.4% in 2016. This contrasts with key regional competitors such as Viet Nam and Thailand, which steadily increased their export share to GDP ratio during the same period. This trend illustrates that Sri Lanka's export growth is too feeble to be able to remain a key contributor to GDP.

8. – ITC calculations based on Comtrade data.

9. – International Monetary Fund (2016). *Sri Lanka – Staff Report for the 2016 Article IV Consultation and Request for a Three-Year Extended Arrangement Under the Extended Fund Facility*, p. 54. IMF Country Report No. 16/150. Washington, D.C.

Figure 7: World export share, comparison with regional peers, 2000–2015 (percentage of world exports)

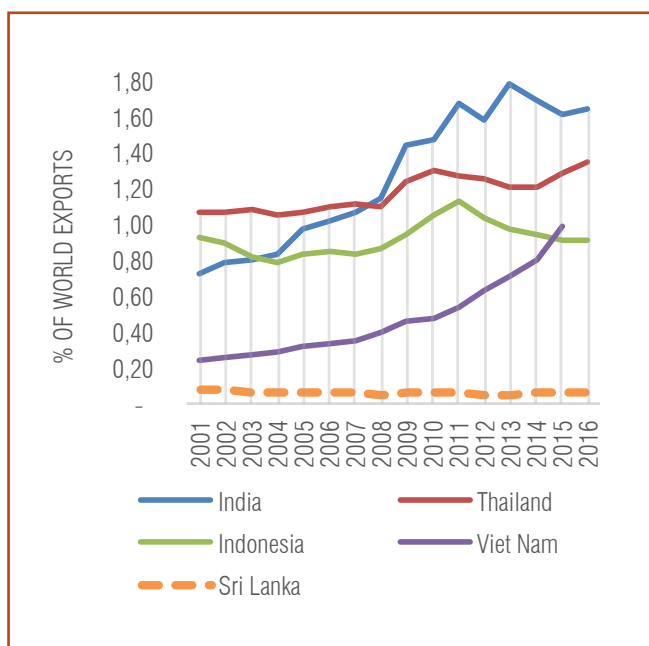
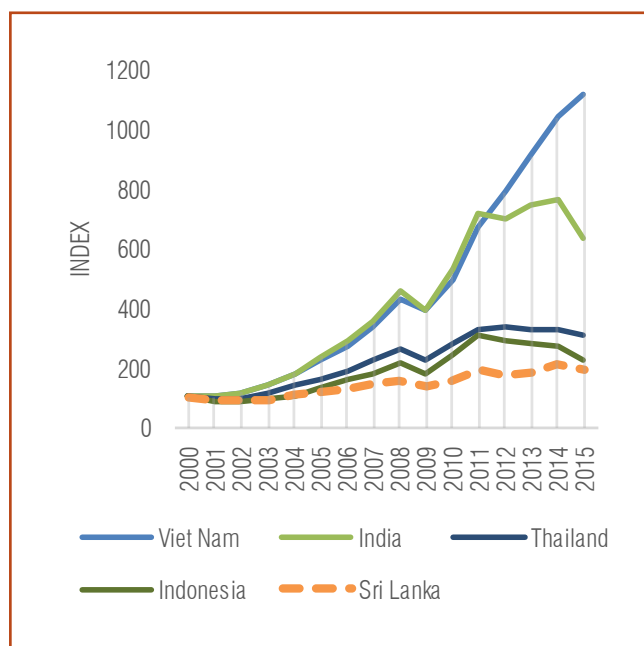


Figure 8: World export index, comparison with regional peers, 2000–2015

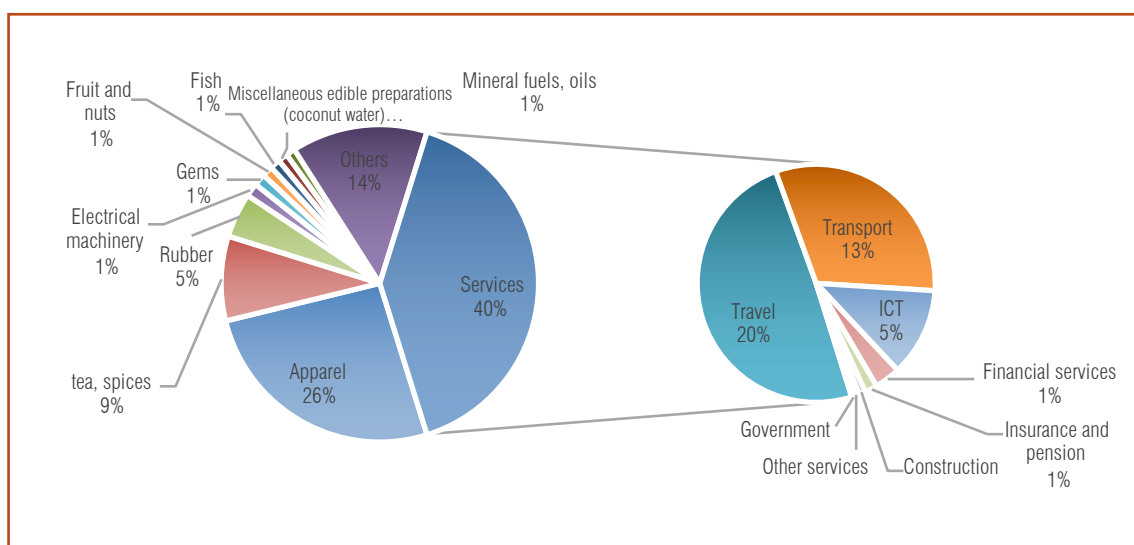


Source: ITC calculation based World Development Index indicators, 2017.

Currently, Sri Lankan export engines rely on a blend of traditional industries and growing services sectors. In 2016, the export sector consisted mainly of apparel (26%), travel services (20%), transport services (13%), tea and spices (9%), and rubber (5%). Sri Lanka doubled its export value by intensifying exports of traditional industries rather than through export diversification. However, more recently,

Sri Lanka has increased its exports of electrical machinery, gems and processed food products such as coconut products. Meanwhile, Viet Nam has not only multiplied tenfold the value of its exported goods and services but also developed its support industries and contiguous sectors, and increased its modern, high value added production, including high technology, chemicals and other industries.

Figure 9: Composition of Sri Lanka's exports of goods and services, 2016

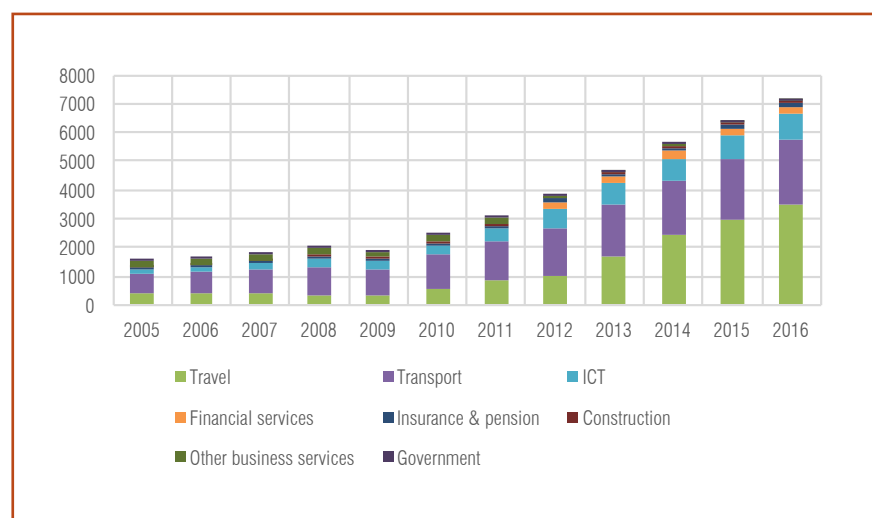


Source: ITC calculations based on Comtrade data, 2017.

Even though exports of goods show limited diversification, the services sector has been evolving more dynamically, becoming one of the drivers of recent export performance. In absolute terms and compared with 2005, Sri Lankan exports of services quadrupled to US\$ 7.1 billion in 2016. In relative terms, service exports increased from 4.7% of GDP in 2011 to nearly 8% in 2015. The services sector also enjoyed a trade surplus, which stood at US\$2.3 million in 2015. Within services exports, the greatest growth

came from the travel, and information and communications technology industries, with 24% and 18% annual growth between 2006 and 2016 respectively. The transportation sector enjoyed 12% annual growth over the same period. The travel industry overtook transportation services in 2014 and became the largest service export, culminating at US\$3.5 billion today. Recently, financial, insurance and pension – as well as construction – services have gained, but still play a less significant role in overall Sri Lankan exports of services.

Figure 10: Sri Lankan services exports, 2005–2016

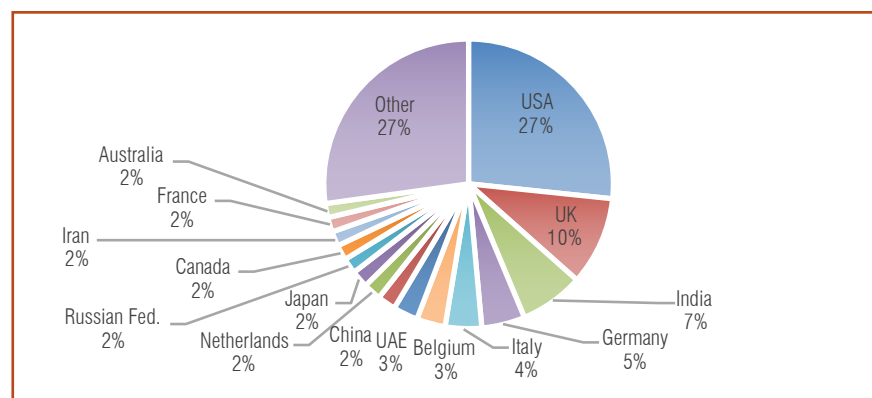


Source: ITC calculations based on Comtrade data, 2017.

The main goods' export destinations remained relatively unchanged over the past decade, showing limited overall market diversification. In 2016, Sri Lanka's top export destinations were the United States of America (27% of total exports in goods), the United Kingdom of Great Britain and Northern Ireland (10%), India (7%) and Germany (5%). Compared to 2005, the ranking of the top four export

destinations did not change, while their total share decreased by 9%. Current global trends in market development will be relevant for future Sri Lankan exports. The foreseen granting of the EU Generalized System of Preferences+, Brexit, the Trans-Pacific Partnership and prospering Asian markets are all changing Sri Lanka's positioning in the international trade environment.

Figure 11: Sri Lankan export destinations, 2016



Source: ITC calculations based on Comtrade data, 2017.

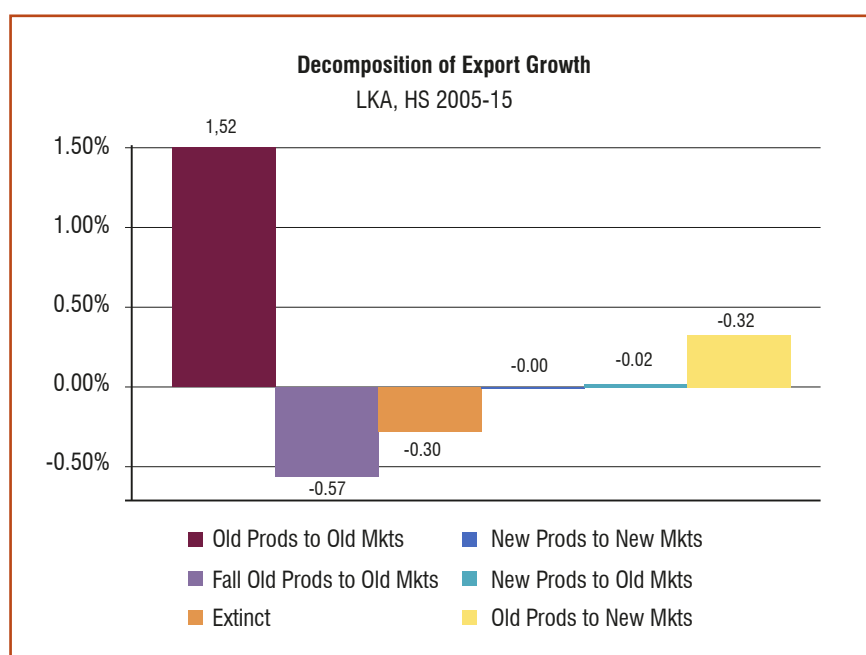


Photo: (cc) - Anushka Wijesinha

Even though market diversification remained modest, Sri Lanka's new markets mostly emerged in Asia rather than Europe over the last five years. The greatest growth of exports between 2012 and 2016 was in the Chinese (23%), Indian (8%), American (7%), Canadian (7%) and Emirati (7%) markets. European destinations have generally been shrinking since 2011 as a share of Sri Lanka's total exports. This confirms the ability of mature export sectors to expand their market reach. For example, tea is exported to 111 countries, while apparel is exported to around 90 countries.

As already indicated, Sri Lanka needs to overcome systemic challenges to diversify its export industries. The vast majority of export growth can be attributed to intensification of existing product categories and market relationships. Around 32% of the export growth in goods can be attributed to already existing products exported to new markets. Only 2% of export growth resulted from new products exported to existing markets. Growth attributed to new products reaching new markets (full diversification) was negligible.

Figure 12: Decomposition of Sri Lankan export growth, 2005–2015

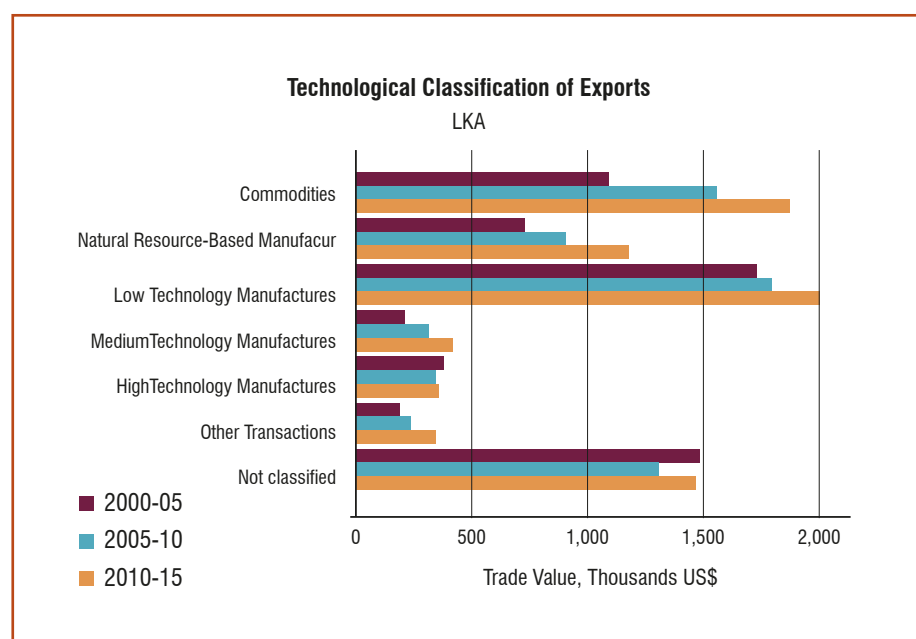


Source: ITC calculations based on Comtrade data, 2016.

This difficulty in diversifying export products and markets is in part linked to the fact that exports tend to be concentrated in low-technology, labour-intensive segments which are vulnerable to cost shifts. It also reflects the sustained decrease in relative manufacturing exports and high-tech manufacturing exports caused by the high cost of imported inputs and a weak national innovation system. This development will become even more pronounced in the future as

Sri Lanka continues its path towards higher middle-income status, which goes hand in hand with more increases in the cost of labour. The challenge of improving productivity (e.g. through higher capital endowment or demand-driven technical and vocational education and training programmes) is becoming a key challenge that needs to be addressed in order for Sri Lanka to stay competitive.

Figure 13: Technological classification of Sri Lankan exports



Source: ITC calculations based on Comtrade data, 2016.

It is still challenging for SMEs – which account for 80% of all businesses in Sri Lanka, provide 45% of employment and contribute 52% of GDP – to engage in exports. Sri Lanka recognizes SMEs as the backbone of the economy¹⁰ but they face challenges competing with certified quality products, connecting with foreign buyers, and adapting to constantly evolving global technologies and production methods.¹¹ These difficulties affect SMEs' capacity to develop new products as well as to diversify export destination markets. Many SMEs use outdated technologies and equipment, leading to higher production costs, waste and lower productivity. Insufficient management capacity, business knowledge and support programmes to guide enterprises on productivity improvement limit the development of many Sri Lankan SMEs.

10.– Sri Lanka, Ministry of Industry and Commerce (n.d.). *National Policy Framework for Small Medium Enterprise (SME) Development*, p.1. Colombo.

11.– ITC (2016). *SME Competitiveness Outlook: Meeting the Standard for Trade*. Geneva. Available from www.intracen.org/uploadedFiles/SMECO2016.pdf.

Exports of manufactured products have overall experienced a low during the past 15 years but almost came back to their 2000 level in 2015 at 76% of all Sri Lankan exports. During the same period, regional competitors such as Viet Nam and Thailand increased their manufacturing export share. Domestically, increases in manufacturing value addition, which almost doubled between 2000 and 2015, contributed the most to GDP.¹² Internationally, according to the United Nations Industrial Development Organization (UNIDO) Industrial Performance Index,¹³ in the past 15 years,

12.– Based on UNIDO (2017). UNIDO Statistics data portal. Available from <http://stat.unido.org/#>. Accessed 31 October 2017.

13.– The Industrial Performance Index makes calculations based on: 1. Manufacturing value added per capita; 2. Manufacturing export per capita; 3. Share of Medium-high and high technology (MHT) activities in total manufacturing value addition; 4. Share of manufacturing value addition in GDP; 5. Share of MHT manufactures exports; 6. Share of manufactures export in total exports; 7. Share of the country in world manufacturing value addition; 8. Share of the country in world manufactures exports. For more details, see: Upadhyaya, Shyam (2013). *Composite measure of industrial performance for cross-country analysis*. Vienna: UNIDO.



Photo: (cc) - Anushka Wijesinha

Sri Lanka went down six places in rank and holds position 75 out of 148 countries. That Sri Lanka primarily focuses on serving the national market, rather than the international market, explains the inverse international and domestic development of Sri Lanka's industrial sector. Focusing on the domestic market makes diversification of exports through the development of modern export industries more difficult.



Photo: (cc) - Anushka Wijesinha

Figure 14: Industrial Performance Index, comparison with regional competitors, 2005–2015

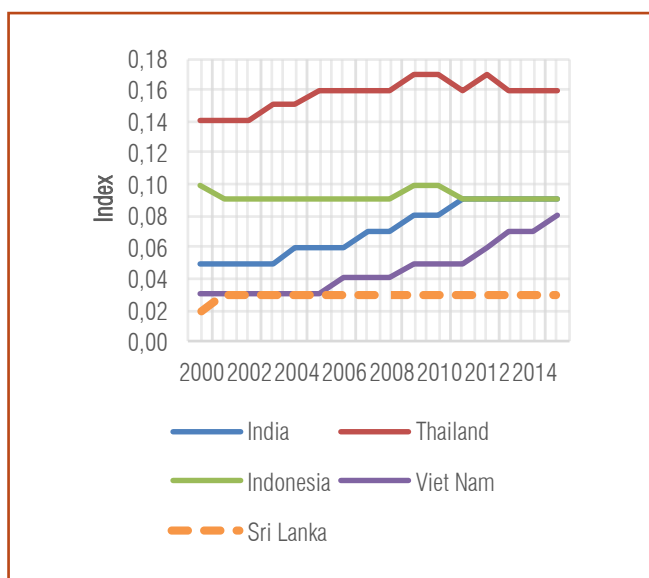
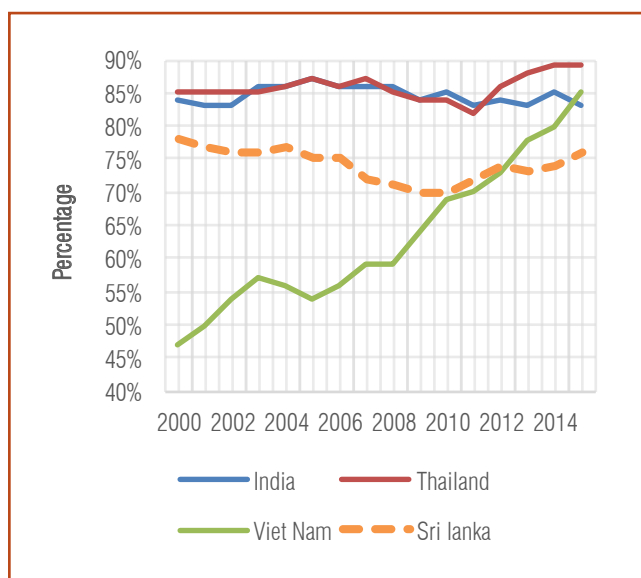


Figure 15: Manufactured goods - proportion of exports, comparison with regional competitors, 2005–2015



Source: ITC calculations based on UNIDO statistics and World Bank World Development Indicators, 2017.

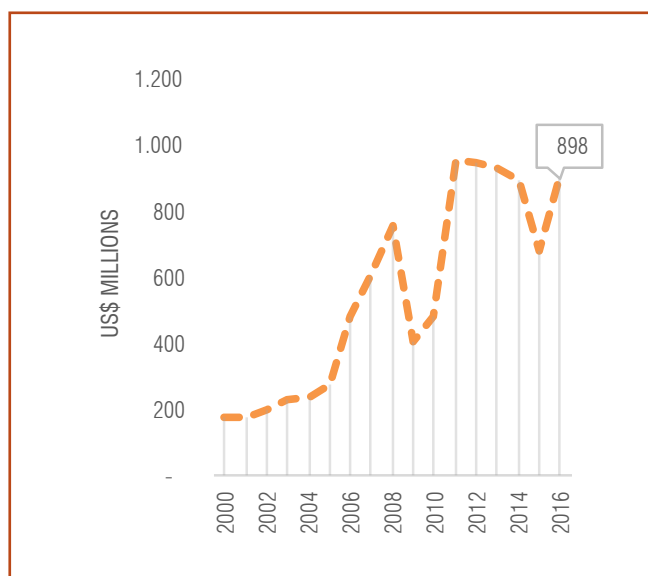
Compared with its neighbours, Sri Lanka has not been successful in tapping into foreign direct investment (FDI) as a source of capital and innovation. In fast-growing newly industrialized countries, FDI plays a major role in stimulating fast dynamic economic growth and export development.¹⁴ Sri Lanka's FDI inflows stood at US\$898 million

in 2016, showing a recovery for the first time since 2011.¹⁵ The sectors that have attracted the highest level of FDI (capital investment) are logistics, transportation and warehousing, financial services and tourism services. Manufacturing has failed to attract significant levels of FDI. The highest level of job creation through FDI was recorded in the apparel, construction and tourism services sectors.

14.– Verité Research (2013). *Sri Lanka: International Trade – Performance and Prognosis*, Vol. 1. No. 1. November 2013. Colombo .

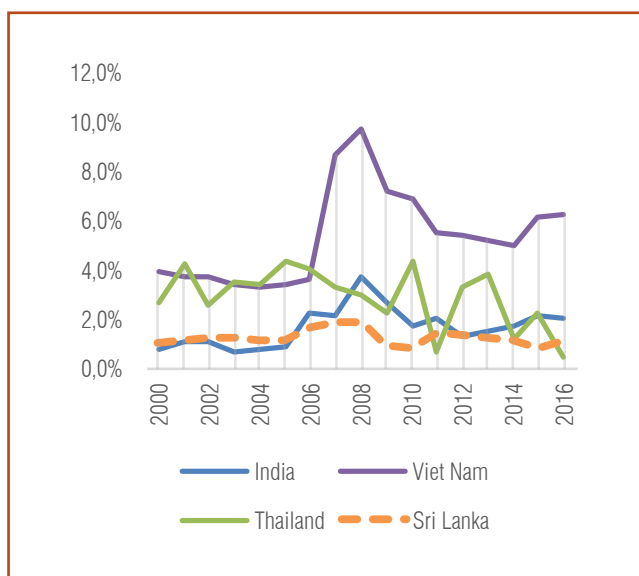
15.– World Bank Group (2017). World Development Indicators. Available from <http://data.worldbank.org/data-catalog/world-development-indicators>. Accessed 3 November 2017.

Figure 16: Net FDI inflows to Sri Lanka (balance of payments), 2000–2016 (current US\$ millions)



Source: World Bank, 2017.

Figure 17: FDI as a percentage of GDP, comparison with regional competitors, 2000–2016 (per cent)



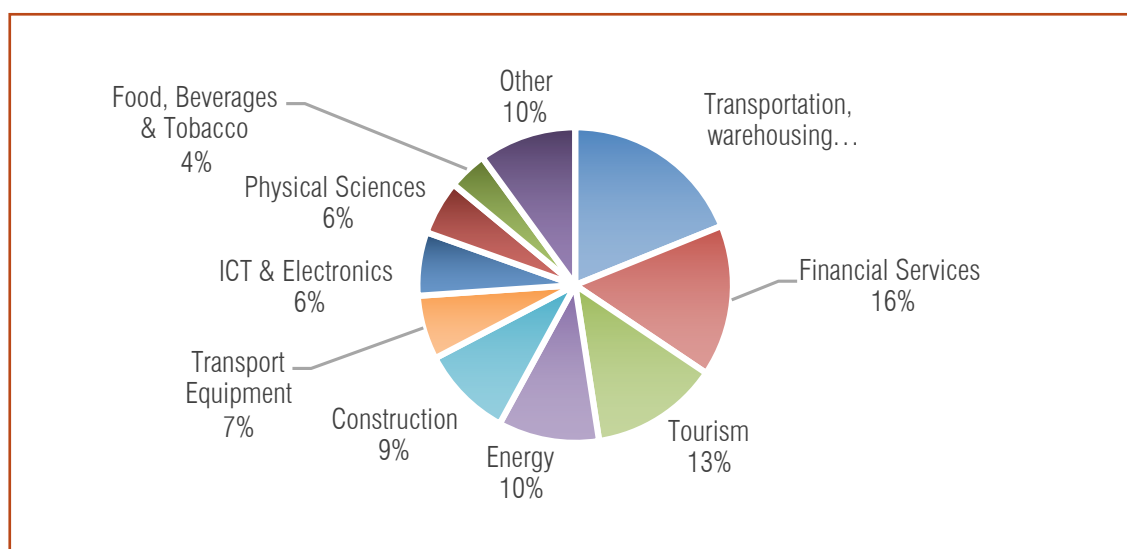
Factors which explain the challenging performance of investment attraction include the unpredictability of the trading environment and the limited transparency of policies. This makes Sri Lanka a less attractive investment destination and limits the willingness of national enterprises to upgrade production lines. Some of the critical challenges in attracting FDI include the absence of a clear investment policy and state-of-the-art investment legislation designed according to international best practices and that clearly articulates

the institutional structure, roles and functions of the relevant agencies.¹⁶ Moreover, the application of policies has been highlighted as being ad hoc in nature. The BOI one-stop shop has been established but is not yet fully operational¹⁷ and investment-related information remains insufficient.

16.– World Bank Group (2016). *Enhancing Competitiveness in Sri Lanka*. Washington D.C., p.27.

17.– World Trade Organization (2016). *Trade Policy Review – Report by the Secretariat. Sri Lanka*. WT/TPR/S/34. Geneva.

Figure 18: Capital expenditures 2003–2017 by industry clusters (total: US\$ 19.34 billion)



Source: fDi Markets (2017).

Although exports have maintained stable growth over the past decade, systemic issues limit rapid expansion of Sri Lanka's exports, which is reflected in the stagnation of the country's world export share, among other indicators. Currently, Sri Lankan export engines rely on a blend of traditional industries and growing services sectors. On the industry and manufacturing sides, Sri Lanka has not been able to diversify away from its traditional export industries, i.e. apparel, tea and rubber. The difficulty diversifying exports is due to a number of factors, including exports being concentrated

in low-technology, labour-intensive segments which are vulnerable to cost shifts. SMEs, which account for 80% of all businesses in Sri Lanka, still face numerous challenges to engage into exports, which strongly limits export diversification potential. In addition, compared to its neighbours, Sri Lanka has not successfully tapped into FDI as a source of capital and innovation.

These systemic challenges create a situation where exports are not growing fast enough to be able to remain a strong contributor to the economic growth of Sri Lanka.

THE WINDOW OF OPPORTUNITY – EXPORTS AT THE HEART OF UPCOMING REFORMS

A number of concurrent circumstances make the NES very timely in the recent evolution of Sri Lankan trade. The Government's Economic Statements of 2015 and 2016 envisage a more liberal, simple, transparent and predictable trade regime promoting trade-led growth, driven by export-oriented FDI. Several recommendations have been made in favour of increased export competitiveness and innovation. These include, among others, the Exporters' Association of Sri Lanka 2016 and 2017 concept papers, as well as numerous studies and research papers, including those by the Institute of Policy Studies and Verité research, and the Sri Lanka NTP recently endorsed by the Government.

The present NES represents a timely catalyst through which the export sector will be reshaped. The NES is aligned with Vision 2025 and the NTP, which both aim to stimulate growth and job creation by improving the ability of firms to export and compete in foreign markets. The NES builds on consensus from the entire export community about the upcoming tasks and the heaviest roadblocks to be dislodged. It defines a detailed road map for faster export growth and acknowledges that things need to be done differently if trade is to contribute more to economic development.

The time to transform the export sector is now. The current wave of economic reforms for a more transparent and flexible business environment, combined with increasing regional trade opportunities and major transformations in production techniques provide a unique window of opportunity for Sri Lanka to modernize and start a new cycle of export growth. The NES will enable the country to realize its full potential as an inevitable regional trade hub and a beacon of trade openness.

VISION 2025 SETS THE TONE

The NES is aligned with Sri Lanka's policy framework and will help achieve the ambitions of Vision 2025 and the NTP. Vision 2025 crystallizes Sri Lanka's objective of finally transitioning to an export-led era. Vision 2025 references both the NTP and the NES as the main tools to transform Sri Lanka into a regional hub of high-value exports:

“ **Become a beacon of openness and finally enable the export 'boom'** ”

The NES is in line with specific chapters under Vision 2025. The following elements are the main points of synergy between the NES and Vision 2025:

- The Government's economic vision: Vision 2025 specifies that it aims to transform Sri Lanka into an export-oriented economic hub at the centre of the Indian Ocean, with a knowledge-based, highly competitive, social-market economy. The development of Sri Lanka as a trade and logistics hub is at the centre of the NES.
- Addressing constraints on growth: Vision 2025 also mentions the need to reverse all remnants of protectionist policies and remove key regulatory barriers. The NES prioritizes the barriers to be removed and adjusted in its PoA.
- New approach to growth: Vision 2025 aims to introduce supportive legal reforms, including setting up a land bank. These measures are also included in the NES because they will benefit exporting industries.
- Improvement of the growth framework: The business environment of Sri Lanka is one of the main areas of intervention under Vision 2025, which again aligns with the NES. Areas of convergence include upgrading Sri Lanka's ranking in the *Doing Business* classification, a review of investment incentive policies, the integration of SMEs into the formal sector, and development of the logistics hub and services sectors, including tourism.
- Technology and digitization: The Vision will favour investment in the information and communications technology industry, and digitization of government operations. Both of these are also prioritized in the NES.
- Strengthening coordination and monitoring implementation: Vision 2025 clearly mentions institutional coordination and management of implementation as a major weakness for Sri Lanka. The NES has a clear governance structure and roles and responsibilities, as well as an implementation tracking system.



Vision 2025 comes after a succession of opposing economic and fiscal policies. The first generation of economic and social reforms brought trade liberalization to Sri Lanka's economy from 1977. These important reforms largely defined the current institutional, policy and regulatory framework structuring the country's trade agenda. However, between 1999 and 2009, successive Governments introduced regulatory reforms that negatively impacted the openness of Sri Lanka's trade regime. The successively opposing economic and fiscal policies of the past 25 years created a complex trade and business environment that has constrained the competitiveness of Sri Lankan exports, creating high Government debt required to finance growth and crowding out investment in innovation. It is now time for a new wave of reforms in favour of openness and commerce.

THE WELL-KNOWN CONSTRAINTS THAT REQUIRE URGENT ACTION

The main constraint to export competitiveness is a complicated business environment and institutional set-up.

The fragmented institutional network, costly export procedures and delays in introducing key solutions (such as a single window or a land bank) are some of the constraints which have been impeding export development for decades.

While neighbouring countries have managed to take off, Sri Lanka's export development has remained timid due to these and other aforementioned persistent constraints.

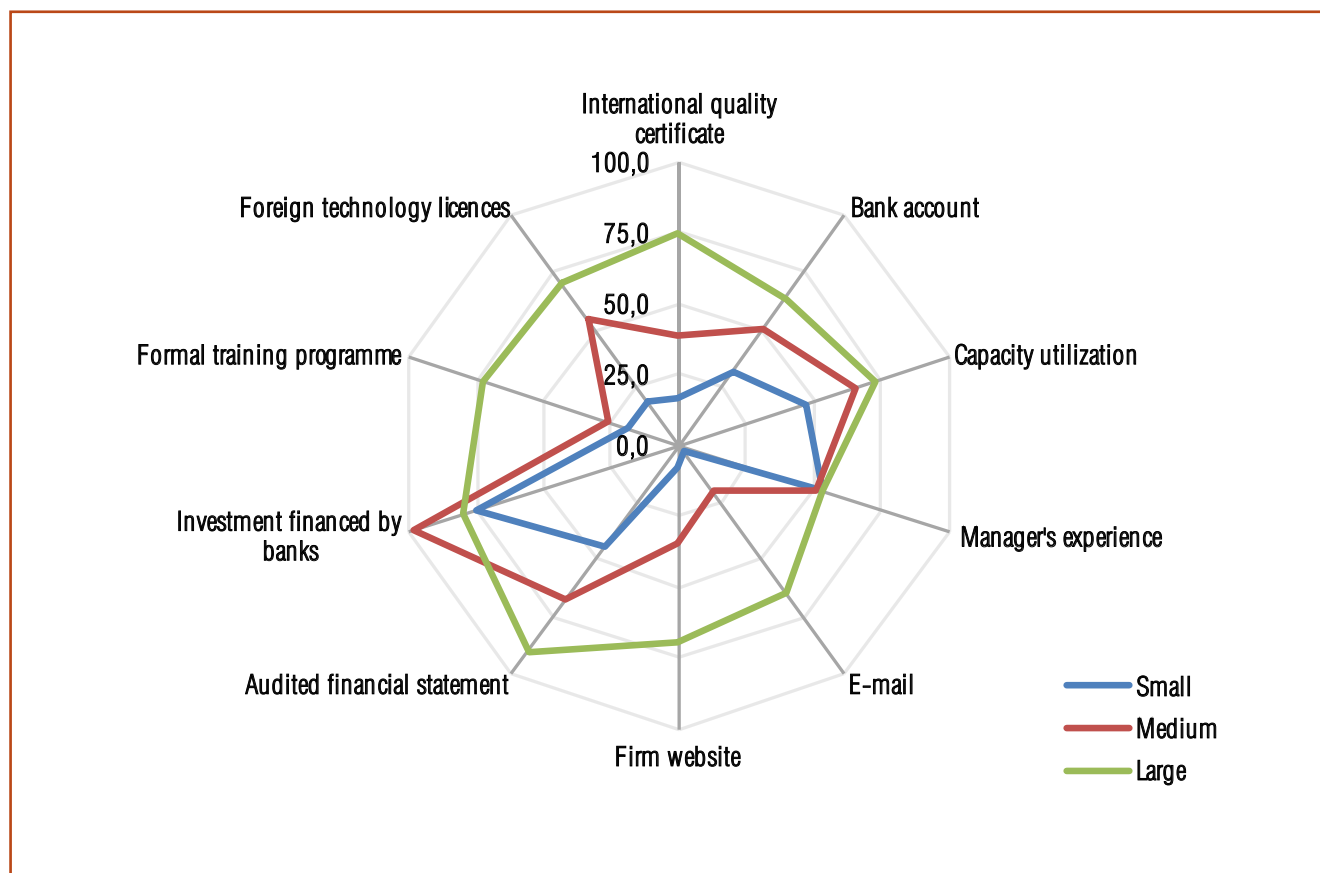
Verité, the Institute of Policy Studies, McKinsey and the World Bank have also provided valuable insights into the constraints and opportunities for export development and diversification. The vast majority of studies point towards a fragmented regulatory and policy environment, which includes complex protectionist measures and a fragmented institutional environment that does not fully service the needs of exporters.

The ITC *SME Competitiveness Outlook* of 2016 provides an overview of firm-level constraints. It is clear that for firms, and especially SMEs, the main issues are the capacity to connect and change. These issues are related to outreach capacities of firms as well as their capacity to innovate their production base. These will be analysed in further depth in the review of competitiveness constraints below.

The NES builds on findings and complements them with the testimony of entrepreneurs collected through the consultative Strategy development process. The constraints identified are structured along the four main axes that the Strategy will address, namely: policy and regulatory issues; market entry and compliance bottlenecks;

the constraints preventing Sri Lanka from becoming a regional trade and logistics' hub; and export diversification and innovation constraints. These four main areas were instrumental to defining the major strategic objectives of the NES.

Figure 19: SME competitiveness in Sri Lanka – firm abilities



Source: ITC (2016).

Policy and regulatory framework issues

- The fragmented institutional network, both public and private, leads to complicated, delayed and often costly export procedures.
- Unstructured public–public and public–private coordination leads to inconsistent, ad hoc policies and uncertainty for exporters and investors.
- Delays in introducing trade-enabling key solutions (automation, single window, land bank).
- Delays in defining operational guidelines to implement new/updated regulations/legislation (Merchant Shipping Act, etc.).
- Certain industries particularly suffer from remnants of trade-averse policies.
- Limited availability and performance of modern export credit insurance.

The fragmented institutional network, both public and private, leads to complicated, delayed and often costly export procedures. Businesses in Sri Lanka face a complex web of public institutions, resulting in a fragmented, sometimes incoherent and contradictory policy framework. In multiple instances, there is more than one institution responsible for a specific support function. Institutions also tend to coordinate vertically (with their lead ministry) and not horizontally

(with their peer organizations). This leads to obvious service overlaps and creates a complex environment. This particularly affects SMEs that have insufficient capacity to understand and navigate within this framework, which is not harmonized with international standards and best practices. This complex business environment increases operational costs for SMEs and exporters, creates delays in exports and discourages informal enterprises from formalizing.

Unstructured public–public and public–private coordination leads to inconsistent, ad hoc policies and uncertainty for exporters and investors. As mentioned, institutions tend to coordinate in a vertical manner rather than horizontally. In addition, there is insufficient public–private coordination occurring, specifically when developing policies. Supportive policies, such as Sri Lanka's competition policy and the Electronic Transactions Act, have not yet been able to create a conducive business environment that support SMEs. Many policies are considered either ineffective or biased against the interests of an open, competitive economy. As an example, SMEs are not able to fully embrace the opportunities of e-commerce due to online financial services such as Paypal not being accessible in the country.

Delays in introducing key solutions (automation, single window, land bank). A number of initiatives have been proposed for many years but have never been implemented, despite being crucial for export development. This is particularly the case with the land bank and the single window. These two initiatives respond to major constraints associated with land allocation and efficiency of export procedures. The main reason for the delay is the complexity of the institutional landscape mentioned earlier, as well as differences in approaches and policies among institutions. One of the priorities of Vision 2025 is implementing these solutions, and the NES sets the detailed modalities.

Absence of operational guidelines to implement new/updated regulations/legislation (Merchant Shipping Act, etc.). A very common problem is the absence of operational guidelines to ensure implementation of regulations which have been gazetted. This adds to the already very complex legal framework composed of multiple layers of amendments. In many cases the original regulation dates back more than 50 years. Simplification of national legislation is a major burden which has been, until now, mostly avoided because of time constraints. The NES has prioritized the areas where these reforms are unavoidable.

Certain industries particularly suffer from remnants of trade-averse policies. An identified anti-trade bias in tariffs and taxes raises the price of inputs and protects certain national industries from international competition, impeding Sri Lanka's development of internationally competitive sectors. Furthermore, trade policy formulation, as well as enforcement, remains fragmented, occasionally lacks coherence and is often not harmonized with internationally adopted standards and best practices. This complex regulatory framework, together with costly processes, prevents many SMEs from competitively participating in trade and benefiting from existing support programmes.

Limited availability and performance of modern export credit insurance. Awareness among exporters (especially SMEs) of the types of export finance solutions available, and their costs and benefits, is low. In addition to the cost of finance, this low level of awareness is another reason for the low demand for and use of export finance. Exporters also lack the technical competency to approach banks for financing and to decide on the best financing options. In addition, there is limited variety, availability and sophistication of export finance solutions available to companies, with no special export credit financing, value chain financing, export credit refinance window, bilateral export credit lines or export factoring. Sri Lanka also does not have a development bank to assist its enterprises, especially SMEs.¹⁸ Finally, the export finance sector regulatory framework is outdated, especially regarding the repatriation of export proceeds.

18.– Verité Research (2015). *Expanding Exports: Role and Relevance of Export Finance*.

Market entry and compliance issues

- Difficult access to/availability of relevant and affordable national data and market information to make strategic product and market decisions.
- NQI has limited services available for exporters to comply with standards in target markets, including no traceability system or information on applicable international standards and regulations.
- Lack of access to advanced certification and testing facilities, and prohibitive cost of obtaining such services from abroad.
- Challenging country and product branding requiring efficient IP, geographical indication (GI) and trademark systems.
- Targeted export promotion support focuses on few enterprises and markets due to limited resources.
- Limited coordination with foreign missions for data collection and product promotion in target markets.

Difficult access to/availability of relevant and affordable national data and market information to make strategic product and market decisions. On one side, there is a lack of proper information about the industries of Sri Lanka, especially in emerging sectors. Statistics related to value chain operations have not been recorded properly, which makes it difficult to establish baselines for any development strategy. On the other side, information is also lacking about markets. Challenges accessing relevant and competitively priced trade information on key markets have been highlighted as a major constraint to entering new markets. Access to quality trade intelligence and in-market support from commercial attachés remains challenging for many exporters and SMEs.

NQI has limited services available for exporters to comply with standards in target markets, including no traceability system or information on applicable international standards and regulations. A poor quality assurance system, few mutual recognition agreements, a challenged metrology function and the limited ability of local laboratories to issue certain international certificates and handle a large number of requests all pose major challenges, not just for SMEs but also for larger enterprises. The uneven regional distribution of laboratories across Sri Lanka, limited capacity to enforce food safety and consumer protection measures, and outdated legislation make it complicated for enterprises to ensure the quality of products. This is confirmed by the scores of Sri Lanka in the *ITC SME Competitiveness Outlook* report carried out in 2016. The scores show that getting an international quality certificate is among the top five major constraints faced by SMEs (see figure 19).

Lack of access to advanced certification and testing facilities, and prohibitive cost of obtaining such services from abroad. As mentioned, the NQI in Sri Lanka is lagging in multiple ways, specifically on conformity assessment. Testing and certification of certain parameters is not available nationally. While several test laboratories operate in the country, the capacities of these are still limited. SLSI and the Industrial Technology Institute (ITI) offer a wide range of testing services and private institutions provide some services in niche areas, and the medical testing laboratories sector is growing.

Not all laboratories are accredited against International Organization for Standardization/International Electrotechnical Commission 17025 yet, and in many cases laboratories are not in a position to demonstrate their competence or traceability of measurements because staff capacities, facilities and instruments are insufficient or there are no domestically available measures – such as suitable inter-laboratory comparisons, proficiency testing schemes, or certified reference materials – against which to test their competence. The calibration capacity required to support all existing testing laboratories is also insufficient. Very few CABs are

accredited. In addition, there is no list of required conformity assessment processes for different product groups and people do not know where to find such information. It takes producers a lot of time to obtain this information, which often leads to missed opportunities or obtaining services internationally at a higher cost.

Challenging country and product branding requiring efficient IP, GI and trademark systems. National branding initiatives for specific industries and for Sri Lanka as a whole have not yet been implemented. This type of widespread initiative requires industry coordination as well as strong institutional capacities. The partial coverage of the legal framework and inadequate recourse system for the protection of IP (e.g. GIs), also discourage private investments in branding, as brands are exposed to copying in target markets. The current IP registration regime needs to be reviewed and fast-tracked, and some missing IP registration tools – such as GIs, collective marks and database protection – need to be put in place. Finally, Sri Lanka is not a member of the Madrid and Lisbon agreements, which require that exported products be protected in each individual market.

Targeted export promotion support focuses on few enterprises and markets due to limited resources. Insufficiently focused and coordinated promotion of Sri Lankan brands and enterprise support in trade promotion activities curtails the development of sustainable demand for Sri Lankan products. While established industries can build on long-term business networks, SMEs and nascent industries face challenges accessing market information and requirements (from standards and regulations to licensing requirements). Another side of the issue is the limited skills of SMEs to make the most of their participation in fairs and the capacity to conduct successful business-to-business (B2B) meetings.

Limited coordination with foreign missions for data collection and product promotion in target markets. Foreign missions are extensively used by other countries to channel information, both from the country for promotion, and to the country for market information. They also play a key role in lobbying for specific product recognition measures in target markets. These functions are poorly executed by Sri Lankan foreign missions due to limited coordination with the private sector, limited resources of commercial missions and the absence of an online system for coordination. There is potential to diversify markets for Sri Lanka if coordination with foreign missions is systematized and broadened.

Trade and logistics hub issues

- Certain legislation impedes the implementation of the single window and other TSF reforms.
- Delayed application of 'expediting shipments' due to insufficient warehousing, including cold storage facilities, and the clearance process (specifically affecting less than container load (LCL) and air cargo) at ports.
- Challenging expansion of cargo, entrepot, MCC and LCL de-stuffing capacity due to delays in reforming procedures, legislation and institutional frameworks.
- Limited development of logistics services (cold storage, reefers, dry ports, etc.) outside of the Western Province, with limited loading/unloading points along trade corridors.

Certain legislation impedes the implementation of the single window and other TSF reforms. Various border procedures and regulations create significant barriers for enterprises. Complex requirements exclude SMEs and entrepreneurs who do not have high business competency from accessing world markets. Many trade-related processes remain manual and paper-based, with significant duplication of documentation required by different agencies. SMEs in particular are often not aware of existing paperless processes and use paper-based methods.

Implementation of a single window system has been discussed for many years but never realized. A single window system would provide a great opportunity to reduce the complexity of cross-border formalities if a number of key principles are taken into account. First, the implementation of the single window should be premised on the reengineering of trade procedures, with a view to align documentation and information requirements to international standards (e.g. UN Layout Key, WCO data model) and to remove redundant processes and information requirements. Second, the single window project should include the modernization and automation of border regulatory agencies whose operations are still manual and paper-based. Finally, the single window project should entail a large scale review of government-wide and agency-specific acts, regulations and administrative procedures to ensure that Sri Lanka legal framework is consistent with the TFA requirements and conducive to the establishment of the single window.

The three principles mentioned above have been taken into account into the recently launched single window initiative in Sri Lanka. However, it should be noted that two key road-blocks still remain: the lack of coordination between cross-border stakeholders and the difficulty to align agencies' legal frameworks.

Delayed application of 'expediting shipments' due to insufficient warehousing, including cold storage facilities, and the clearance process (specifically affecting LCL and air cargo) at ports. A number of inefficiencies limit logistics operations, the upshot of which is that the country cannot

upgrade its logistics sector and transform into a regional hub. LCL de-stuffing and handling time is long, which affects import-related charges. It can take 3–7 days or more to unload a consignment due to inadequacies at ports. Problems range from lack of infrastructure and equipment to both shortages of labour and overstaffing, limited automation and labour allocation, and productivity inefficiencies. Pilferage and damage due to organized sabotage is also a serious problem for inbound consignees that depend on imported inputs for manufacturing and processing. As a result, export processing is delayed and clearing costs increase.

In addition, there are not enough good MCC facilities, as evidenced by the lack of modern warehouses at ports that can support fast pick and pack operations. According to stakeholders, there is only one warehouse with adequate facilities. This issue partly stems from no land being made available for the private sector to operate closer to Colombo Port. There is no reclaimed land adjacent the Colombo International Container Terminal or at productive areas around Colombo Port. The logistics corridor between Colombo Port and the international airport in Katunayake has a number of suitable locations that can be developed for this purpose but the land bank proposed by the Government is to identify logistics services areas and the Ministry of Megapolis and Western Development has already identified the proper land in the Megapolis plan, implementation of which will start from 2018. According to stakeholders, land is available on the northern side of Colombo Port and several facilities can be easily relocated there in the short term.

There is no multi-user facility for buying/storage/processing of fresh produce. There are no adequate bonded logistics centres and existing facilities are not always well connected. A feasibility study by Expolanka (industry operator) determined there is no clear demand for such facilities since private operators use their own facilities and transport using dry ice. However, no clear market demand to develop such facilities is explained by limited information and statistics to support the development of a cold chain industry and the absence of a detailed study on the need to establish such facilities.

Finally, there are no 'plug and play' solutions available for new players to easily establish their operations. Global players need to be attracted to start operations and distribution immediately. Therefore, identified locations should be allocated quickly, with operational infrastructure such as rail and road connectivity so cargo clearance and movements can be performed fast and at low cost. Such plans should be amalgamated with the Megapolis project and other regional development plans.

Challenging expansion of cargo, entrepot, MCC and LCL de-stuffing capacity due to delays in reforming procedures, legislation and institutional frameworks. Outdated laws on logistics activities impede upscaling operations. The following laws pose problems:

- Lack of competitive tariffs and laws encouraging MCC: a policy for liberalizing MCC/LCL was presented in the last budget but the issuing of the relevant Gazette and guidelines amendments has been delayed.
- A new Customs Act has been drafted but not submitted to the Cabinet – the existing Customs Ordinance is outdated. The proposed new Act, which has been drafted to facilitate trade in line with World Trade Organization Trade Facilitation Agreement commitments, needs to be adopted as a priority. The overall result would be reduced transaction costs, increased speed and a paperless

environment with maximum automation through a national single window.

- No paperless transaction and no interconnected Customs service station for document submission (when entering a port) included in the Customs Ordinance to facilitate logistics operations (Customs Ordinance of 1869).

Limited improvements have been made through the Automated System for Customs Data (ASYCUDA) but the overall process has not been well-linked to facilitate trade.

Limited development of logistics services (cold storage, reefers, dry ports, etc.) outside of the Western Province, with limited loading/unloading points along trade corridors. In addition to lacking infrastructure and regulations, logistics-related services are underdeveloped in Sri Lanka. There are no reliable temperature-controlled facilities and appropriate value adding services along logistics corridors. The limited capacities of airports and port terminals limits volume growth of the industry. The rail networks are unused/underused for transportation of containers and reefer containers, and integrated multimodal connectivity networks are missing. There is also low capacity utilization of vehicles and reefer trucks to transport frozen food. A strategic plan has to be put in place for perishable cargo management that can help exports and domestic consumption costs.

Export diversification and innovation issues

- High concentration of export industries and services in Western Province, with underdeveloped SME/export services networks in other regions.
- Limited use of modern technologies due to high costs, limited awareness of new trends and insufficient skills.
- An appropriate support framework has not been established to encourage firms to innovate.
- Insufficient promotion and investment targeting for emerging industries.

High concentration of export industries and services in Western Province, with underdeveloped SMEs/export services networks in other regions. National development has until now tended to occur in the Western Province and in urban centres, leaving other provinces out, especially in the north. Today, 82% of Sri Lanka's population still resides in rural regions, where the agricultural sector employs most workers.¹⁹ SMEs from these less-developed regions face greater difficulty exporting and have few incentives to do so. This is also due to the fact that regional export support services are scarce and tend to be concentrated around Colombo. The NES will look into ways to connect these regions through

institutional support and digital networks, and by improving logistics' connections.

Limited use of modern technologies due to high costs, limited awareness of new trends and insufficient skills. Although lead firms have emerged in many industries, presenting themselves as examples and using modern technologies to be competitive, smaller firms still struggle to catch up with global trends. This is especially the case for SMEs in the regions. Understanding of the need to upgrade existing production lines, as well as the appropriate financial tools to do so, are limited. Finding appropriate skills locally is a challenge for firms that need workers able to operate more advanced technologies in production plants.

19.— World Bank Group (2017). The World Bank in Sri Lanka – overview. Available from www.worldbank.org/en/country/srilanka/overview.

An appropriate support framework has not been established to encourage firms to innovate. The first aspect of this constraint is the challenge for firms to find technology transfer schemes or technology advisory services. The Government has not yet developed the required technology transfer programmes and services to support SMEs and foster regional development. This would be an appropriate tool and incentive to integrate informal SMEs and regional firms into national development. National lead firms can be involved to support and provide guidance for smaller firms.

Another key aspect of this constraint is the mismatch between academia and the needs of the export industry, due to limited coordination and a misalignment of incentives. Links between universities' research programmes and the business community are weak. Finally, entrepreneurs and nascent industries do not benefit from an enabling incubation environment. Public investment in R&D in Sri Lanka is much lower compared with other lower middle-income countries. The lack of R&D options is especially glaring in nascent industries. This is one of the main constraints that slows down economic diversification in Sri Lanka. The industries with high potential in Sri Lanka are not prioritized as areas for research in universities, due in part to the weak links between higher education, industry and national chambers of commerce. In the NES, the most-affected industries are processed foods and beverages, wellness tourism, the boating industry, EEC and IT-BPM.²⁰

Insufficient promotion and investment targeting for emerging industries. Investment targeting has been carried out predominantly in traditional sectors such as apparel, construction and tourism services. Investment can be a tool to foster economic diversification but has not yet been used as such. Emerging sectors under the NES require some

20.– The I&E Strategy provides more details on these issues.

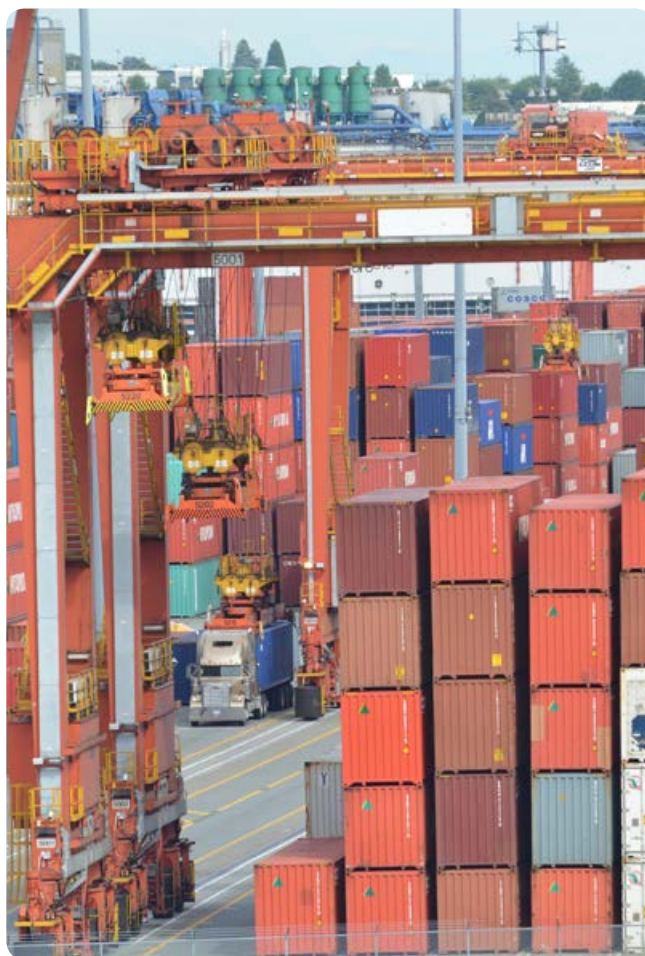


Photo: (cc) - Anushka Wijesinha

specific investment areas, which are listed in each sector strategy. The sector strategies also define the coordination mechanisms required to confirm areas of focus along each sector value chain. Increased investment targeting through key institutions is needed to drive export development.

The analysis of trade patterns, a detailed literature review and the challenges highlighted by public–private stakeholders during the first NES consultation have brought to light several trade facts. Over the last five years, Sri Lanka has successfully diversified into new markets but mainly through traditional products. The findings suggest a number of vulnerabilities in Sri Lanka's export competitiveness that need addressing.

Sri Lanka needs to overcome low levels of R&D and innovation, high tariffs on imported inputs for production and re-export, and the slow improvement of internal logistics and transportation. There are further challenges in the country's limited attraction of investment to emerging export sectors; the partial disconnect between skills

requirements and education; complex and unpredictable policy frameworks; and the need to ensure SMEs are included among the country's exporters. Reforms to the financial, trade and business environment have been identified as critical to create a new cycle of growth for the Sri Lankan economy.

The new wave of reforms aims for Sri Lanka to fully participate in the global economy through offering knowledge-based competitive products and services. The intended and anticipated trade-led growth will enhance export competitiveness and strengthen Sri Lanka not only in the economic, but also in the social, political, education and health spheres.

THE TIME IS NOW – STRATEGIC ORIENTATIONS

The time to transform the export sector is now! The current wave of economic reforms aimed at creating a more transparent and flexible business environment, combined with increasing regional trade opportunities and major transformations in production techniques, provide a unique window of opportunity for Sri Lanka to modernize and trigger a new cycle of export growth. The NES will enable the country to realize its full potential as a regional trade hub and a beacon of trade openness.

The NES is a timely catalyst through which the export sector will be reshaped, as it builds consensus among the entire export community about the upcoming tasks and the heaviest roadblocks to be dislodged. To seize the window of opportunity, Sri Lanka's NES proposes a clear-cut strategic orientation for the public and private sectors to join forces

to drive the reforms required for Sri Lanka to reach its potential. It defines a detailed road map for faster export growth and acknowledges that things need to be done differently if trade's contribution to economic development is to increase.

The NES addresses some of the root causes which constrain Sri Lankan exports, while simultaneously encouraging market diversification and development. The broad scope of the NES ensures that it simultaneously addresses innovation challenges; attraction of FDI to productive industries; removing unnecessary and challenging regulations; improving online access to key government services and trade intelligence; reducing anti-trade tariffs; strengthening quality export compliance across the priority value chains; and reducing the costs of logistics and doing business.

NES: Blending top-down and bottom-up processes to consolidate national and sector priorities into a comprehensive implementation framework.

The NES design process provided a rationale for selecting focus sectors and TSFs based on their ability to achieve the vision. The NES diagnostics highlighted key national priorities for improved competitiveness, such as streamlined institutional and regulatory frameworks, export finance and improved trade promotion. The main NES aggregates and consolidates national priorities as well as key high-level priorities from each sector/TSF into a coherent framework.

The stand-alone sector and TSF strategies focus on their industry-specific priorities but also highlight cross-sector priorities such as access to technology, development of industry clusters and linking industry to academia. These cross-sector priorities are integrated in the main NES.

VISION AND STRATEGIC OBJECTIVES

Through an inclusive and consultative process, Sri Lanka's industry leaders and public sector representatives defined the following NES vision:

“ Sri Lanka – an export hub driven by innovation and investment ”



Photo: ITC

In order to fulfil this vision, the following strategic objectives have been identified as the main pillars to structure the action planning for an implementable NES. These four broad objectives, which provide a framework for export development over the next five-year time frame, were considered fundamental for a focused and prioritized NES:

1. TO HAVE A BUSINESS-ENABLING, PREDICTABLE AND TRANSPARENT POLICY AND REGULATORY FRAMEWORK THAT SUPPORTS EXPORTS.

Predictability of regulations and procedures is a priority for enterprises and exporters to manage operations efficiently and reduce the costs of doing business. A streamlined and transparent regulatory framework is important for innovators and investors to be able to set up operations in Sri Lanka with ease. The private sector considers this objective fundamental to improve export competitiveness. It focuses on re-engineering processes for improved institutional coordination, streamlining administrative procedures and deepening the digitization of trade-related processes.

A transparent and simplified business environment is difficult to achieve within a fragmented institutional setting and without re-engineering of business processes within institutions. To achieve this objective, the main NES PoA favours initial establishment of an institutional public and private co-ordination mechanism for trade policy design, formulation and execution. This key action aims to increase transparency and coordination between key partners to avoid ad hoc policymaking and duplication of efforts. The NES also seeks improved processes to streamline institutional coordination and implementation of export development interventions.

This objective equally prioritizes updates to Sri Lanka's regulatory environment by amending and reviewing a number

of regulations, including the Quarantine Law and Customs Ordinance, as well as reviewing import regulations to streamline trade procedures and become an effective trade hub. The gazetting of the Electronic Transactions Act or the amendment of the BOI Law will boost the attractiveness of the country as an efficient place to do business. The NES regulatory reform priorities reflect the cross-sectoral needs of the focus sectors and TSFs. This objective also highlights the need for improved export finance and insurance solutions, and recommends increased involvement of the private sector in trade negotiations.

2. TO STRENGTHEN SRI LANKAN EXPORTERS' MARKET-ENTRY AND COMPLIANCE CAPACITIES.

This strategic objective focuses on strengthening two key TSFs that deliver trade information and promotional support as well as quality compliance services, both of which are necessary to increase exporters' performance in destination markets. The improvement of the trade information and promotion TSF and the strengthening of the NQI²¹ will benefit SMEs, emerging exporters and mature export industries alike.

Improved access to market-specific information and analyses at a reasonable cost are critical for Sri Lankan exporters to understand market opportunities and comply with the regulatory procedures of destination markets. The trade information and promotion priorities of the NES strive to improve data collection, analysis and dissemination processes between key institutions such as EDB, DoC, CBSL, private

21. – A stand-alone NQI Strategy was developed on the basis of the National Quality Policy – approved by the Cabinet in November 2016, the Sri Lanka NQI Gap Assessment was completed by the World Bank with technical guidance from UNIDO. The NQI Strategy was designed with technical assistance from and using the methodology of ITC.

sector chambers of commerce and others, in order to create a unique platform for exporters to easily access relevant, up-to-date and affordable market intelligence. This objective equally aims to focus trade promotion efforts in line with industries' priorities by increasing engagement with trade missions, creating a genuine Sri Lankan brand, and ensuring exporters' brand protection by strengthening targeted IP processes.

Quality services in Sri Lanka are relatively developed compared with other lower middle-income countries. Remaining compliance challenges need to be addressed to increase enterprises' ability to satisfy market requirements. Strengthening the NQI function will increase the ability of national institutions to effectively support SMEs' and exporters' compliance with market requirements and standards. The NQI Strategy provides an actionable road map to implement the National Quality Policy and improve coordination between SLSI, MUSSD, SLAB, the Consumer Affairs Authority, CABs and other institutions responsible for ensuring the quality of products. This objective will also make testing, adherence to standards and traceability more affordable and accessible, thereby increasing the protection of Sri Lankan consumers as well as market entry for exporters. Finally, with the coming free trade agreements to be negotiated by Sri Lanka,²² quality systems, standards and mutual recognition agreements need to keep pace. The NES privileges quality management and trade information and promotion not only to improve the sustainability of supplier-client relations in third markets but also to improve value addition of exports.

3. TO BECOME AN EFFICIENT TRADE AND LOGISTICS HUB TO FACILITATE EXPORTS.

This objective is critical for Sri Lanka to become a recognized hub serving Asia and the world. It aims to create the conditions for Sri Lanka to leverage its enormous shipping and logistics potential by strengthening its infrastructure, improving services and attracting the investment and skills required for sustainable growth. Handling 5.7 million twenty-foot equivalent container units in 2016, Colombo Port is the twenty-third largest port in the world. With other major commercial ports being expanded and developed, such as Hambantota for bulk and roll-on/roll-off cargo, Sri Lanka has enormous potential to attract additional shipping lines to strengthen its status as an internationally renowned maritime hub.

This objective will be achieved through a dual approach of increasing transshipment, MCC and commercial hub activities for international shipments, while simultaneously ensuring improved services for Sri Lanka's own transport and exports of goods. A key focus of the Strategy is on reforming the logistics ecosystem by adjusting key regulations such as the Sri Lanka Port Authority Act, Electronic Transactions Act and Commercial Hub Regulations in order to increase the sophistication and quality of services. The NES also recommends provision of adequate facilities – such as warehouses, bonded logistics centres, common user facilities and improved rail connections between ports and airports – in order to increase storage capacities, facilitate e-commerce operations, attract more transshipment and increase overall capacity.

The achievement of this objective depends and builds on Sri Lanka's World Trade Organization trade facilitation obligations implemented by the National Trade Facilitation Committee and supported by various development partners. Recognition of Sri Lanka as a logistics hub depends partly on implementing the single window system, rolling out e-payment solutions and increasing the efficiency of border agencies. Improved logistics and trade services will be key to increasing Sri Lanka's own exports of goods.

4. TO DRIVE EXPORT DIVERSIFICATION THROUGH INNOVATION AND BY STRENGTHENING EMERGING EXPORT SECTORS.

This strategic objective will create the conditions to implement targeted solutions to develop visionary and emerging export sectors. Established export sectors such as apparel, tea, rubber and coconut products have proven their ability to compete in world markets.²³ While these mature sectors are the backbone of Sri Lanka's export performance, enablement and strengthening of new industries is a priority to empower faster export growth. Most studies of Sri Lanka's export sector confirm the importance of diversifying the export portfolio. The achievement of this ambitious objective requires a multidimensional approach to the development of productive capacities.

In order to capitalize on the potential of emerging export sectors, the NES focuses on implementing necessary national solutions, while equally targeting industry-specific interventions. This dual approach to sector development ensures that all priority actions – including regulations, industry

22.– EDB (2016). The forthcoming Free Trade Agreement (FTA) between Sri Lanka & China, 14 December. Available from www.srilankabusiness.com/blog/the-forthcoming-free-trade-agreement-between-sri-lanka-and-china.html.

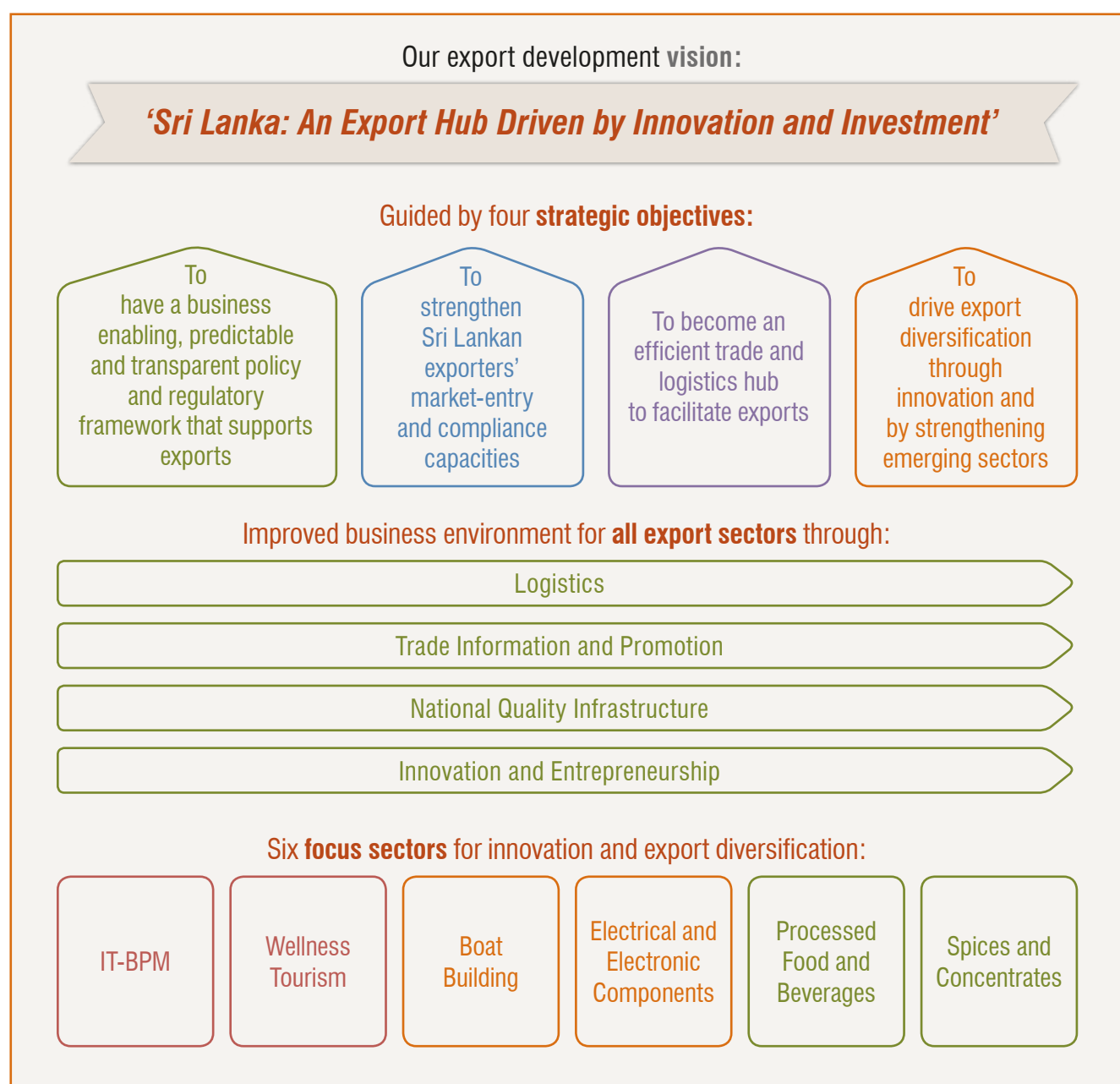
23.– These sectors are driven by strong private sector ownership and built on the sectors' competitive advantages. The rubber sector has the *Sri Lanka Rubber Industry Master Plan 2017–2026* and the textiles sector is developing its own new sector strategy. Other important sectors with high export potential, such as fisheries, are already receiving support to develop strategically.

coordination and market development – are properly addressed to drive growth in each focus sector. The NES focuses on reinforcing new export industries by proactively improving the provision of skills to support the growth of these industries; attracting investment, technologies and knowledge into these promising sectors; and supporting integration of SMEs from across Sri Lanka into the export value chain. For each focus sector, specific measures aim to improve competitiveness through practical solutions such as facilitated access to competitively priced inputs, improved production techniques or enabled industry clusters in dedicated BOI zones or special economic zones.

Innovation is critical to diversify Sri Lankan exports. As innovation creates effects beyond a specific export sector, an independent working group of public and private stakeholders was appointed by the Prime Minister to design a stand-alone I&E Strategy.²⁴ The implementation of this I&E Strategy will support the NES priority to reorient R&D and innovation to support the needs of emerging export sectors.

24.– The I&E Strategy of Sri Lanka was developed independently of the NES, by MoDSIT with the technical assistance of the World Bank. The NES and I&E Strategy jointly contribute to build innovation in exports and entrepreneurship of SMEs.

THE FOLLOWING SCHEMATIC ENCAPSULATES THE NES STRATEGIC ORIENTATIONS



PRIORITIZED TRADE SUPPORT FUNCTIONS

Building on the vision and the strategic objectives described above, the Sri Lanka NES includes TSF strategies that target horizontal dimensions of trade affecting the overall competitiveness and efficient functioning of the entire export sector. Examples of such TSFs include testing products in laboratories (quality), market analysis and trade promotion activities, access to credit guarantee schemes, access to

warehousing facilities, and simplified and predictable trade facilitation measures. These TSFs target key horizontal dimensions of trade that affect the overall competitiveness of Sri Lanka's export sector.

As part of Sri Lanka's NES, the following TSFs were prioritized for focused intervention: **trade information and promotion, NQI, logistics and innovation and entrepreneurship**. The priority TSFs are presented and discussed in greater detail in the following section.

Trade information and promotion

Rationale	Developing a strategy to organize trade information and promotion services is crucial to enabling exports. Challenges in accessing relevant and competitively priced trade information on key markets were highlighted as a major constraint to entering new markets by small and large exporters. Access to quality trade intelligence and in-market support from commercial attachés remains challenging for many exporters and SMEs. Insufficiently focused and coordinated promotion of Sri Lankan brands and enterprise support on trade promotion activities curtails the development of sustainable demand for Sri Lankan products. While established industries can build on long-term business networks, SMEs and nascent industries face challenges accessing market information and requirements (from standards and regulations to licensing requirements). Another side of the issue is the limited skills of SMEs to make the most of their participation in fairs and the capacity to conduct successful B2B meetings.
How the Strategy will support exporters	<ul style="list-style-type: none"> • Improved, standardized and quality access to data and information through the proposed 'export promotion portal' on existing and new markets for international trade and foreign investment. • Enhanced access for SMEs, both regional and Colombo-based, to international markets and new opportunities. • Targeted and informed trade promotion in destination markets in collaboration with trade attachés and sector associations. • Enriched international branding of Sri Lanka and its sectors from a strategic perspective, boosting the country's image for trade and investments.
Strategic orientations	<ul style="list-style-type: none"> • Improve the quality, reliability, accessibility and affordability of trade information and promotion services. • Build the capacity of SMEs and emerging exporters to collect and analyse trade information and conduct export promotion. • Strategically augment trade promotion programmes with focused interventions.

NQI

Rationale	The NQI in Sri Lanka requires a strategic approach to increase its effectiveness and efficiency, as it is a key export support service and is lagging. However, considering Sri Lanka's need to address quality challenges beyond the sole needs of exporters and to allow implementation of the recently developed National Quality Policy, the NQI Strategy was spun off from the NES and carried forward as an individual initiative with a cross-cutting perspective. The NES and the NQI Strategy were both initiated to improve the competitiveness of Sri Lanka's trade, and are thus interdependent to successfully boost the ability of exporters to comply with market requirements.
How the Strategy will support exporters	<ul style="list-style-type: none"> • Build awareness and understanding about quality in the private sector and general public. • Streamline food safety control in Sri Lanka. • Develop national standards in line with newly developing economic sectors. • Reinforce the overall institutional coordination in the NQI. • Align the NQI with international best practice. • Strengthen technical capacities of NQI core institutions. • Promote the participation of national technical institutions (SLSI, SLAB, MUSSD) in international technical forums. • Initiate the development of an umbrella legal framework for the NQI. • Broaden the metrology function. • Strengthen and broaden conformity assessment in Sri Lanka.
Strategic orientations	<ul style="list-style-type: none"> • Implement the National Quality Policy and improve the institutional framework of the NQI. • Achieve international recognition to the NQI system of Sri Lanka. • Strengthen the NQI framework to support general socioeconomic development.

Logistics

Rationale	<p>Strategically located in South-East Asia, at the crossroads of the fastest-growing region in the world, Sri Lanka is close to many emerging markets and is already an important regional logistics hub. The overall performance of port-related services has been improving. Total container handling in 2016 increased by 10.6% to 5.7 million twenty-foot equivalent container units, up from 5.2 million handled in 2015.</p> <p>While Sri Lanka is one of the major transshipment hubs in Asia, the logistics industry has not fully tapped the growing opportunities in transshipment and e-commerce. There is a unique opportunity to develop a world-class logistics hub and enter the global supply chain industry that is rapidly digitizing and evolving with a new generation of consumers.</p> <p>Sri Lanka aims to transform into South Asia's leading maritime, logistics and distribution hub to support the national economy. This will be achieved by fostering the right regulatory environment and implementing enabling procedures and guidelines for provision of efficient logistics services. These actions will create the conditions for the private sector to lead development of the logistics sector, attract the investment needed to install the proper facilities across the country (cold storage solutions and multi-user facilities) and provide value added services through MCC, LCL de-stuffing and commercial hub activities.</p>
How the Strategy will support exporters	<ul style="list-style-type: none"> • Streamline regulatory and institutional reforms to improve Sri Lanka's attractiveness as a logistics hub servicing Asia. • Increased capacities of ports and airports to provide value added services through MCC, LCL de-stuffing, e-commerce and commercial hub activities. • Targeted sector and investment promotion in overseas destination markets.
Strategic orientations	<ul style="list-style-type: none"> • Create an enabling and efficient business environment driven by technology and public-private coordination. • Ensure adequate facilities and the availability of a qualified labour force. • Promote the global image of Sri Lanka as a logistics hub.

Innovation and Entrepreneurship (I&E)²⁵

Rationale	<p>Sri Lanka is already a middle-income country, but no country has retained this status without strongly supporting the Innovation and Entrepreneurship agenda. As salaries continue to increase, Sri Lanka will not be able to compete in labour-intensive industries. To enable firms to drive of economic growth, innovation will become a key differentiator in existing industries (from food processing to electronics and devices). Better use of technologies from nanotechnology, biotechnology, mechatronics, robotics and artificial intelligence can contribute to bring make the economy more diversified and resilient. The country has to support the development of human capital and growth entrepreneurs in knowledge-intensive industries if we want to become competitive and achieve high middle-income status.</p>
How the Strategy will support exporters	<p>The I&E Strategy will support exporters by:</p> <ul style="list-style-type: none"> • Upgrading SME quality for competitiveness and exports; • Supporting linkages between large anchor companies and export-oriented start-ups; • Introducing/enhancing incentives for technology adoption; • Improving the business environment to foster growth-oriented start-ups; • Improving access to finance, especially early-stage; • Aligning the public R&D system with private sector needs; • Developing Intellectual Property framework to promote research commercialization; • Developing national technology transfer capacities.
Strategic orientations	<p>The I&E Strategy envisions "a resilient innovative economy and entrepreneurial society for export competitiveness and better jobs". The I&E Strategy is designed to be enterprise centric, ensuring that all strategic objectives keep the needs of the enterprise sector at the forefront. It promotes commercial, scientific and technological merit and fosters collaboration amongst all actors.</p> <p>The three key strategic objectives are to:</p> <ul style="list-style-type: none"> • Support SMEs in developing higher value-added products and services for exports; • Build the ecosystem for scaling growth-oriented start-ups; • Modernize and re-align the public R&D sector.

25.– The I&E strategy was developed in parallel with the NES process, by MoDSIT, MSTRD and MIC, with technical assistance from the World Bank. This I&E strategy is complemented by "Innovating Sri Lanka" developed by the Ministry of Science Technology and Research with COSTI



Photo: mpfb

FOCUS SECTORS FOR EXPORT DIVERSIFICATION

Recent export growth in Sri Lanka has primarily been achieved by intensification of exports through the provision of larger volumes of existing products to established customers. Export growth has also benefited from some market diversification, in which existing products have been exported to new markets. Only 2% of the growth was generated through exporting new products.

Export diversification is considered a favourable policy objective because it supports more resilient growth for middle-income economies. Diversification is considered beneficial to emerging economies because it leads to less market failures until a certain level of GDP per capita is reached. Hence, low- and middle-income countries mostly diversify along the extensive margin, whereas high-income countries diversify along the intensive margin and ultimately refocus their exports towards fewer products.²⁶ This NES supports the export diversification efforts of Sri Lanka.

NES focus sectors were selected based on a number of quantitative and qualitative analytical parameters. Export potential analyses were the starting point in the decision-making process. A variety of sectors were analysed on the basis of current/past export performance, global import demand, market access conditions (tariffs, distances) and percentage of unused potential (per specific markets).²⁷

26.– Hausmann, R. and Rodrik, D. (2003). Economic development as self-discovery. *Journal of Development Economics*, vol. 72, issue 2, pp. 603–633; and Cadot, O., Carrère, C. and Strauss-Kahn, V. (2007). Export Diversification: What's behind the Hump? *The Review of Economics and Statistics*, vol. 93, no. 2, pp. 590–605.

27.– The methodological process related to sector selection is detailed in appendix 5.

FOCUS SECTOR STRATEGIES

Based on the quantitative data provided, secondary criteria and mentioned considerations, the following NES focus sectors were selected through an inclusive and consultative process:

Focus sector	Type of industry	Growth trend
IT–BPM	Services	Mature
Wellness tourism	Services	Emerging
Spices and concentrates	Agriculture	Mature
Boating industry	Manufacturing	Visionary
Processed foods and beverages	Agriculture	Emerging
EEC	Manufacturing	Visionary

Sectors which have not been selected as focus sectors are nevertheless supported by the NES through the implementation of TSF strategies. Comprehensive cross-sector support ensures that the scope of the NES goes beyond the focus sectors. Functional areas including quality management, trade information and logistics are necessary support areas that impact every enterprise.

Individual strategies with detailed PoAs were developed for each of these focus sectors. The individual value chain and market opportunities analyses can be found in each of these strategies. The following section presents the main thrusts of each sector strategy.

IT-BPM

Rationale	<p>In the past 10 years, the Sri Lankan IT-BPM industry has expanded by 300% to reach US\$ 1.2 billion in export revenue. The sector provides employment to more than 80,000 professionals and contributes 12% of Sri Lankan services exports. Compared with other export sectors, the IT-BPM sector has shown great potential to increase export revenue. Sri Lankan IT-BPM companies have demonstrated their competitiveness internationally. This competitiveness rests on reasonable costs, high-quality services and an educated workforce with exceptional skills.</p> <p>This Strategy identifies two specific areas as priorities for implementation. First, create a business-enabling environment and address policy and regulatory bottlenecks swiftly, providing the necessary institutional support to improve marketing and promotion of the sector. Second, launch a 'champion builder' programme to target firms with exponential growth potential that collectively can help boost sector export revenue by US\$2 billion.</p>
Main market opportunities	<ul style="list-style-type: none"> • Reaching new markets with traditional IT products and developing new products: mixed reality, augmented reality and Internet of Things solutions where software and hardware come together. • Increasing the offer of knowledge process outsourcing services (financial and accounting operations, data and document conversion). • Enlarging market outreach to provide BPM services and technical support to large multinational corporations.
What the Strategy will change	<ul style="list-style-type: none"> • Produce pipeline SMEs and create bigger champions. • Move up IP valuation and high technology product engineering
Strategic orientations	<ul style="list-style-type: none"> • To support investment and exports in the IT-BPM sector through a business-enabling, predictable and transparent policy and regulatory framework. • To drive export growth through I&E. • To improve the supply of skilled, highly qualified professionals to satisfy IT-BPM market growth. • To grow champion firms ('the \$2 billion plan').

Wellness tourism

Rationale	<p>'Wellness' is a buzzword in the tourism sector and beyond. Being a global phenomenon, 'wellness' can come in many different forms. International travellers with wellness (or health) in mind look for services that are based on local traditions and natural assets. There is growing demand for hotels with a health orientation, as well as for facilities with a well-defined specialization or concept.</p> <p>Sri Lanka has strategic advantages for the development of its wellness tourism sector. There is a clear synergy between global trends and Sri Lanka's traditional health approaches. The country has natural and traditional endowments that can be used to foster a sustainable wellness tourism value chain that is deeply rooted in local communities and traditions.</p>
Main market opportunities	<ul style="list-style-type: none"> • Anchor market development on a strong quality assurance mechanism for existing German and Japanese markets, and to be able to diversify into new ones. • Moved to new untapped markets, such as the United Kingdom, Sweden, the Russian Federation and Eastern Europe, and Gulf states and business cities in the Far East. • Diversify wellness from the Ayurvedic offer into new geographic areas (small-scale developments such as Shinrin-yoku, herbal gardens or others).
What the Strategy will change	<ul style="list-style-type: none"> • Develop a framework for this nascent sector, both institutional and regulatory, to ensure controlled expansion and avoid negative impacts (quality, environment, reputation, etc.). • Support gazetting of the Ayurveda Act and complement it with additional regulations for other wellness services to establish a strong quality assurance system. • Foster R&D efforts, develop IP protection and support branding and promotion of the industry.
Strategic orientations	<ul style="list-style-type: none"> • Develop coordination between traditional and Western health tourism. • Set up a quality assurance system for wellness and traditional health systems. • Build information about the Sri Lankan health tourism sector and about its target markets.

Spices and concentrates

Rationale	<p>Sri Lanka, the 'Spice Island', has always been renowned for its spices and its extracts or concentrates. The spices and concentrates sector plays a valuable role not only in boosting export earnings but also in enhancing the rural economy and social development. The spices and concentrates industry in Sri Lanka is composed of a large variety of products, ranging from bulk spice products of true cinnamon to value added essential oils. The sector is dominated by smallholders, with over 70% of cultivated land being smallholdings and home gardens. Sri Lanka exports around 30,000 tons of various kinds of spices annually.</p> <p>At present, Sri Lanka is the ninth most important exporter of spices (cinnamon, pepper, cloves, cardamom, and nutmeg) in the world, with total spices exports reaching US\$273 million in 2016. Sri Lanka is the largest producer and exporter of 'true cinnamon' in the world.</p>
Main market opportunities	<ul style="list-style-type: none"> • Product diversification into production of 'spice mixes' and spice-based sauces. • Increase market penetration into existing markets by improving product quality, enhancing packaging and labelling, and increasing production volumes. • Diversify to new markets, alongside existing ones, with 'spice mixes' and spice-based sauces. • Organized production of organic and Fairtrade spices and their extracts for existing and new markets.
What the Strategy will change	<ul style="list-style-type: none"> • Increased quality and quantity of spices produced in Sri Lanka with successfully implemented Good Agricultural Practices and Good Management Practices. • The country will be seen globally as an innovative player in value added spice exports, a step up from its current status as a bulk spices exporter.
Strategic orientations	<ul style="list-style-type: none"> • Strengthen, integrate and simplify the policies and governance framework relating to spices, led by industry stakeholders. • Improve the production and productivity of Sri Lanka's spices sector by ensuring quality control and safety compliance as per global standards. • To be a globally recognized as an innovative player in the value added (pharmaceuticals, nutraceuticals, food flavours and fragrances) spice market segment.

Boating industry

Rationale	<p>Sri Lanka intends to expand its boating industry – now focused almost solely on commercial vessels – and make the country a renowned recreational boating hub and yacht service centre for the Indian Ocean. A boating industry includes not only the boatbuilding sector but also after-sales services (including refitting and repair), marina services, associated recreational services such as boat charters and all services connected with the efficient use of any vessel.</p> <p>Sri Lanka's strategic geographical location at the crossroads of the main maritime routes in South Asia, combined with the Sri Lankan boat industry's long experience, can make the country an attractive maritime hub that provides a full range of services for a boat's entire life cycle, including assembly, refuelling, refit and repair for numerous types of boats, including both seagoing and inland watercraft.</p>
Main market opportunities	<ul style="list-style-type: none"> • A full range of services for the full boat life cycle: assembling, refuelling, refit and repair services for various types of boats. • Expanding production of recreational boats for export to the EU market and emerging regional markets (Maldives, Singapore, Viet Nam, Kenya). • Production of new boat models for the fishing and boating industry. • Boating tourism: sailing, marina services, chartering and boat rental.
What the Strategy will change	<ul style="list-style-type: none"> • Enable an increase in production through creation of industry clusters. • Improved industry performance through partnerships and targeted innovation. • Generate manufacturing employment while also diversifying the tourism offer of Sri Lanka.
Strategic orientations	<ul style="list-style-type: none"> • To create an enabling environment for industry development by updating regulations and infrastructure. • To raise the industry's performance through partnerships and targeted innovation. • To enhance national and international visibility of Sri Lanka's boating industry.

Processed food and beverages

Rationale	<p>Processed food and beverages is a booming sector in Sri Lanka and is diversifying. Sri Lankan products are high quality and have healthy characteristics due to the excellence of local raw materials and the industry's commitment to investment in manufacturing processes and improving its market image. Leading firms already established in the sector can serve as inspiration for smaller companies.</p> <p>Today, the Sri Lankan processed food and beverages sector appears ready for its next growth surge. Although starting from a low base, growth in exports has demonstrated the interest in and markets for Sri Lankan products. Export growth over the last few years clearly shows that the country is in a good position to increase food and beverage processing and transform it into a major industry, turning the sector into a leading foreign exchange earner and a standard-bearer for high-quality Sri Lankan products abroad.</p>
Main market opportunities	<ul style="list-style-type: none"> • Develop new products based on already well-performing healthy foods (healthy biscuits, coconut milk as a replacement for cow's milk, coconut-based dairy, etc.) • Increase awareness about the uniqueness of Sri Lankan food and cuisine.
What the Strategy will change	<ul style="list-style-type: none"> • Increase the quantity of local raw materials and enable imports so exporters can diversify into markets requiring larger quantities. • Increase cooperation between processors and producers and foster investment in commercial farming. • Focus R&D and skills development initiatives in food and beverages processing. • Develop a Sri Lankan cuisine brand and foster product development.
Strategic orientations	<ul style="list-style-type: none"> • Amend the regulatory framework in line with the needs of the sector. • Ensure consistent supply of raw materials for the sector. • Cater to high-quality markets.

Electronics and electrical components (EEC)

Rationale	<p>The EEC sector is an up-and-coming sector for Sri Lanka, with the potential to stimulate innovation, R&D and investment in the country. It is well-positioned to benefit from the EEC industry's steadily increasing levels of manufacturing in Asia, and can contribute to the diversification and technological upgrading of Sri Lanka's exports.</p> <p>Three main approaches could make the EEC sector successful in the next five years. First, leverage the country's existing capacity in electronics manufacturing services while increasing production of electrical parts and products. Second, work to become a component manufacturing base for large multinational brands by linking with the software industry, thus helping Sri Lankan producers move up the value chain. Finally, leverage innovative ideas available in academia and industry to focus on a few high-tech products such as robotics or Internet of Things devices, among other growth opportunities.</p>
Main market opportunities	<ul style="list-style-type: none"> • Making Sri Lanka a contract manufacturing services hub for the region. • Emphasize electrical parts and products manufacturing for original equipment manufacturers from India. • Become a leading component manufacturing base.
What the Strategy will change	<ul style="list-style-type: none"> • Improve the brand and positioning of the EEC sector and make it more competitive. • Enable industry–Government collaboration for cluster development and links with academia. • Build a strong, skilled workforce for the EEC sector, including enthusiastic and innovative youth.
Strategic orientations	<ul style="list-style-type: none"> • Be recognized as a key national export and employment sector. • Establish Sri Lanka as a value added electronics manufacturing hub. • Make existing industry players more globally competitive. • Improve supply of semi-skilled and skilled professionals to satisfy the EEC sector.

MOVING TO ACTION

THE STRATEGIC FRAMEWORK

The strategic objectives define the main thrusts that will guide Strategy implementation to achieve the vision. The main NES PoA responds to this vision by addressing national-level constraints of the export sector in order to leverage opportunities in a comprehensive manner. To this end, the strategic and operational objectives outlined in Figure 20 are prioritized for NES implementation.

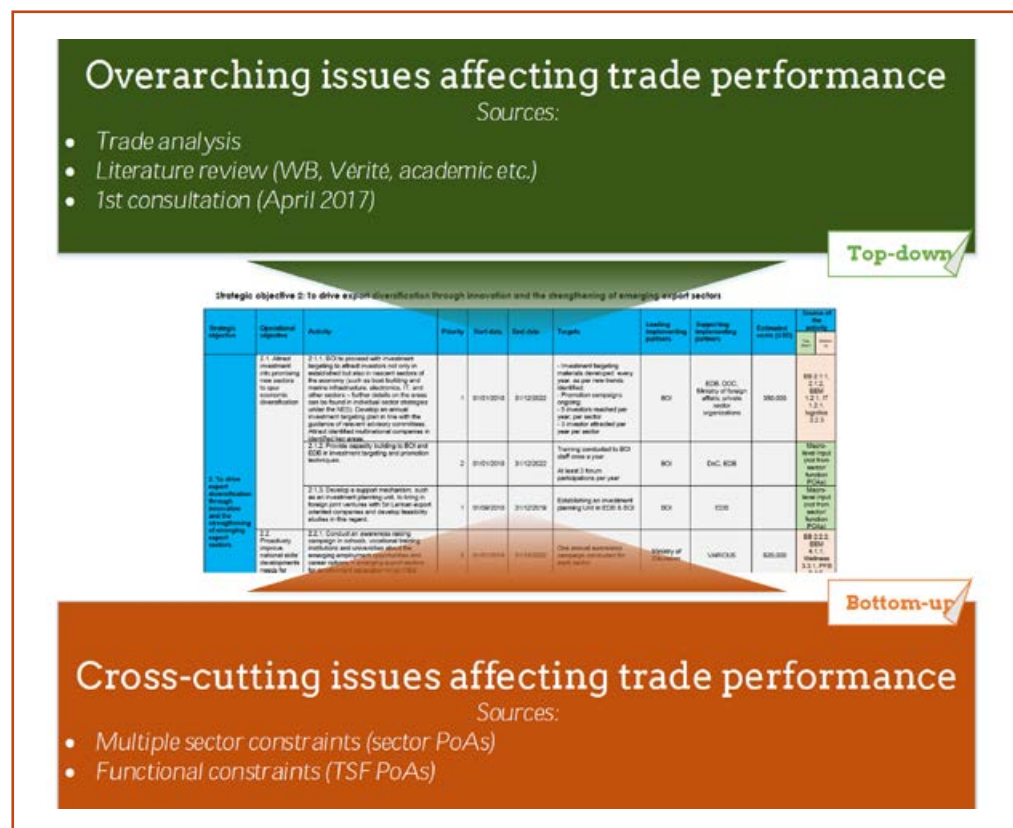
Figure 20: Strategic framework



The development of the main NES PoA intervened at the final stage of the strategy design process. This PoA builds on the significant amount of information collected during the NES design and organizes it in a structured and prioritized manner. The content of the main PoA is essentially drawn from two different sources: the cross-cutting issues that arose from the sector or TSF strategies and well-identified

national-level issues. The combination of both allows a comprehensive main PoA to be built which creates coherence among all sector and TSF PoAs under the NES. The logic followed is shown in Figure 21.

Figure 21: Logic for the definition of the main NES PoA



The purpose of the national PoA is to ensure coherence is created between the sector and TSF PoAs, in order to avoid dispersion of efforts and overlap of interventions, and to facilitate intervention monitoring under the NES. At the same time, sector and function PoAs cannot be the only source to

develop a national PoA, since they tend to be very specific and lose sight of broad national objectives. This is why the national PoA integrates activities that are national in nature and complement the cross-cutting sector issues. This brings all the NES under a coherent implementation framework.

FOCUSING ON NES IMPLEMENTATION SINCE DAY ONE

The NES is part of Sri Lanka's overall trade policy framework and its implementation is part of the Government's overall trade agenda. The NTP prioritized the need to implement an 'export strategy consisting of policy tools, specific projects, sector-specific time-bound targets, expected results and a monitoring mechanism'. The NES provides a coherent framework for prioritized interventions by the Government, private sector and international partners to address Sri Lanka's export challenges and leverage market opportunities.

The NES ensures the translation of export development priorities into implementable projects. The implementation of priorities through an efficient coordinated framework will lead to the translation of NES priorities into implementable projects to help reform the regulatory framework, optimize

institutional support to exporters, and strengthen private sector capacities to respond to market opportunities. A coherent and resourced coordination structure ensures that national trade development efforts do not occur in isolation and are aligned to priorities defined by national policymakers and industry stakeholders.

In order to fast-track implementation of NES priorities, it was essential to ensure the necessary conditions for implementation and coordination were rapidly operational. With this in mind, the Government and private sector representatives agreed on a NES governance structure to be operational in early 2018. A coherent and resourced NES implementation framework was defined to ensure national trade development efforts are aligned to priorities defined by industry stakeholders.

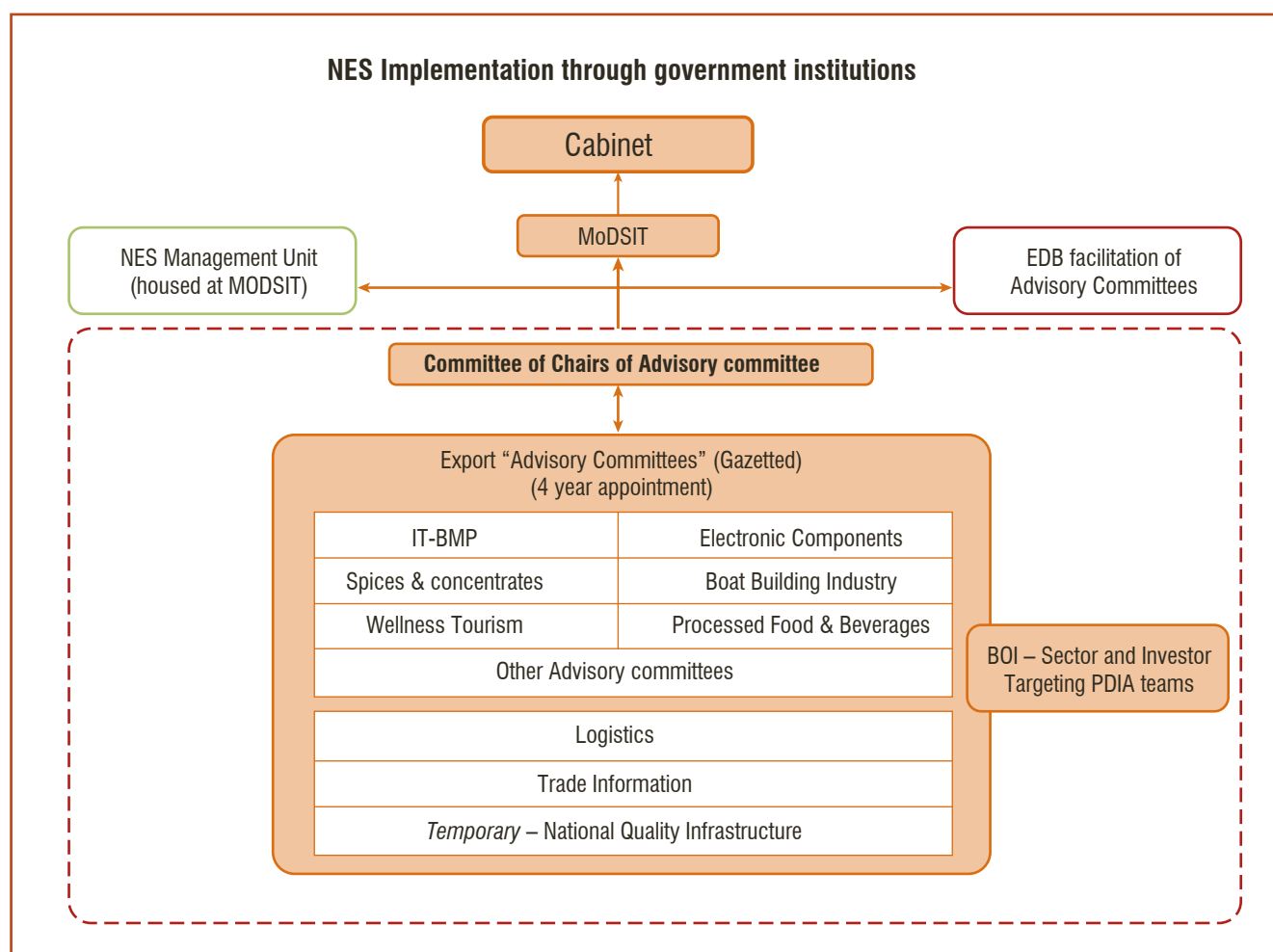
A TRANSPARENT PUBLIC-PRIVATE GOVERNANCE FRAMEWORK

Export competitiveness cuts across ministries, national agencies, subnational institutions, industry associations and private sector organizations. Hence, without transparent national public–public as well as public–private coordination for export development, it would be challenging to achieve targets and export competitiveness would continue to underperform. As such, the governance mechanism for

implementing NES priorities will ensure that implementation responsibilities are assigned effectively, resources are used efficiently, transparency of information leads to accountability, and key public–private operators effectively support implementation.

Each NES priority sector and TSF recommended the formalization of a regular and structured public–private co-ordination mechanism to effectively steer each industry’s development.

Figure 22: NES Management and coordination structure



Export advisory committees were revamped and reorganized to give them more influence and capacity to steer their export industry development strategically. This public–private coordination mechanism works within the existing legal framework of Sri Lanka. The Export Development Act (1979) grants the EDB the following power: ‘On advice from the Board, the Minister may by Order in the Gazette, establish advisory committees for the development and promotion of certain products, product groups and commodities as well as functional aspects of trade’.

Export advisory committees are composed of private and public sector representatives mandated to steer the development of specific export industries in a strategic manner. The committees are operational and responsible for guiding the implementation of their respective sector and TSF strategies. With EDB support, the committees are responsible for providing strategic direction to a specific export industry, and have advisory roles in the implementation of trade development interventions.

A committee of Chairs of advisory committees will ensure oversight and coherence in implementation across the sector and TSF strategies. This additional advisory committee will maintain active cross-sectoral public–private coordination to guide overall NES implementation in coordination with the highest level of Government.



Photo: (cc) pixabay

A key NES priority – a formal high-level trade governance council

A key recommendation provided by the vast majority of the 556 participants of the NES design process was to *(re)establish a high-level formal public–private mechanism responsible for coordinating all trade development interventions, including the NES, and reduce duplications among trade-related institutions* (see main NES PoA – 1.1.1). The membership is to be appointed in a transparent manner. The council is to be chaired by the President or Prime Minister. The council should reduce ad hoc trade policymaking and oversee the implementation of trade-related initiatives.

A high-level trade steering body is best practice.

- In the **United States**, the President's Export Council performs the overarching advisory function in the domain of international trade. This council advises the President on crucial Government policies and programmes, which in turn

influences trade performance and promotes expansion of exports.

- In **Singapore**, the Committee on Singapore's Competitiveness (CSC) was established May 1997 through a directive from the President of Singapore to the Ministry of Trade and Industry. The CSC is composed of 15 members representing government ministry leaders, private sector leaders, banking institution representatives and trade union representatives.
- In March 2015, **Malaysia's** Ministry of International Trade and Industry established a National Export Council chaired by the Prime Minister. The Council aims to boost exports through better facilitation, including improving processes, procedures, regulations and documentation for exports; infrastructure; certification requirements; and logistics.

A NES MANAGEMENT UNIT TO MAINTAIN THE MOMENTUM OF IMPLEMENTATION

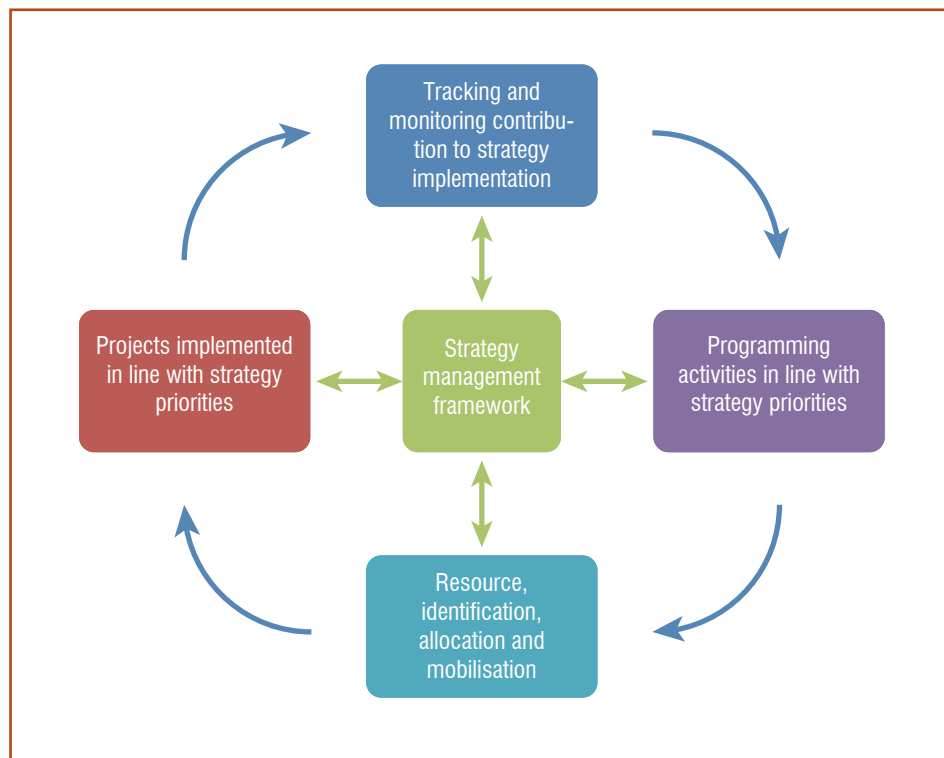
A NES Management Unit is operational at MoDSIT to co-ordinate and monitor implementation of Sri Lanka's NES. The Management Unit reports to the Secretary of MoDSIT and is primarily responsible for ensuring the PoAs adopted under the NES are implemented in a timely and efficient manner. The NES Management Unit is composed of full-time staff seconded from key trade-related national institutions of Sri Lanka. It will work in close coordination with the private sector and the Ministry of National Policies and Economic Affairs (MoNPEA) and the Ministry of Finance (MoF) to programme and monitor NES implementation.

In collaboration with the advisory committees, the NES Management Unit will support and guide implementing partners in the programming and delivery of priority projects. The NES Management Unit is responsible for ensuring the NES PoAs are implemented in a timely and efficient manner by working closely with relevant ministries, national

agencies, industry associations, private sector organizations and development partners to ensure coordination in the implementation of the NES. Additionally, the NES Management Unit will track the progress of implementation and prepare progress reports to be shared with export advisory committees, MoDSIT and the highest level of Government. Finally, it will work in close collaboration with key implementers to guide the development and submission of annual national budget proposals relevant for NES implementation.

Implementation responsibility rests with the leading national institutions identified in the NES PoAs. Public and private representatives have identified in the NES PoAs *one responsible public or private institution responsible for implementing priority activities*. Public institutions have been consulted to integrate NES priorities into their annual planning cycle and national budget proposals. Planning units of the Government will refer to the NES PoAs for guidance in programming. Private sector institutions will implement their own NES priorities, as the private sector is the greatest beneficiary of NES implementation.

Figure 23: NES annual programmatic cycle across key implementing partners



CONCLUSION: IMPLEMENTATION HAS ALREADY STARTED WITH THE 2018 NATIONAL BUDGET

During the NES design process, ‘quick win’ recommendations for accelerating export development were identified by all focus sectors and TSFs. These financial and non-financial (regulatory reform) recommendations were revised by relevant implementing institutions, MoF and MoNPEA. Quick-win activities prioritized for rapid implementation ranged from regulatory upgrading to enabling SME participation in exports, strengthening visionary sectors and increasing promotion of Sri Lankan products.

The National Budget 2018²⁸ has already allocated critical resources to national institutions in order to fast-track implementation of NES priorities. This confirms the Government’s commitment to rapidly transform and upgrade Sri Lanka’s export sector.

The NES provides a clear road map for the entire export community concerning the interventions required to transform the Sri Lankan export sector. With NES implementation supporting the objectives of Vision 2025 and the NTP, the country can now realize its full potential as a regional trade hub.



Photo: mpfb

28.— See appendix 2 for a list of supported National Budget interventions for 2018.

To achieve the vision and strategic objectives discussed, a robust, actionable and realistic strategic PoA is required. This is provided in the section below and constitutes the planning instrument of the NES.

The PoA is structured along the four strategic objectives and the operational objectives described above. For each objective, the PoA outlines detailed activities and their implementation modalities, which include:

- **Priority level:** Priority 1 being the highest and priority 3 the lowest.
- **Start/end dates:** The desired time frame of the activity.
- **Targets:** Quantifiable targets that allow completion monitoring of the activity during the implementation stage.
- **Leading implementer:** One single accountable lead institution per activity. (The institution may also have a technical role or may have only an oversight and coordination role.)
- **Supporting implementing partners:** Any institution that should be involved at any stage of the activity's implementation.
- **Indicative costs (US\$):** An estimate of the activity's cost for the total implementation period.



Photo: World Bank Photo Collection, © Dominic Sansoni

THE NATIONAL PLAN OF ACTION 2018–2022

STRATEGIC OBJECTIVE 1: TO HAVE A BUSINESS-ENABLING, PREDICTABLE AND TRANSPARENT POLICY AND REGULATORY FRAMEWORK THAT SUPPORTS EXPORTS

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
1. To have business-enabling, predictable and transparent policy and regulatory framework that supports exports.	1.1: Establish institutional, public and private coordination for effective trade policy, design, formulation and execution	1.1.1 Establish a high-level formal public-private mechanism that will be responsible for coordinating all trade development interventions, including the NES, among all responsible ministries and institutions. The membership will be appointed in a transparent manner. The council will be chaired by the President or Prime Minister. It will reduce ad hoc trade policy meetings and oversee the implementation of trade-related initiatives. The mechanism will pay particular attention to: <ul style="list-style-type: none"> Ensuring transparency in information dissemination and in decision-making and composition. Conducting regular meetings and ensuring accountability. Defining clear terms of reference and internal rules and regulations. Evaluating the council's and members' performance. Dual party representation. 	1	01/04/2018	31/12/2018	High-level public-private mechanism established and operational. <ul style="list-style-type: none"> Guide for trade policy formulation developed Training to policy makers provided 	Ministry of Development Strategies and International Trade	Ministry of National Policies and Economic Affairs; Ministry of Finance; Export Development Board; Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	25,000	
		1.1.2 Elaborate a clear guide for trade policy formulation and execution at national and sectoral level to ensure effective public and private consultation.	2	01/04/2019	31/12/2022	<ul style="list-style-type: none"> Advisory committees established and operational. Quarterly meeting of advisory committees held and minutes compiled, shared with EDB Board, Minister and, as required, National Economic Council Biannual meeting of Committee of Chairs held and minutes compiled, shared with Minister and National Economic Council 	Ministry of Development Strategies and International Trade	Department of Commerce	5,000	
		1.1.3 Establish EDB advisory committees for NES focus sectors and TSFs, as well as other priority export sectors. Enable committees with operational support, ensure transparency in appointment of members, and avoid duplication in other committees. Advisory committees to be consulted on key NES related topics such as National Budget proposals, regulatory reforms, branding, R&D focus, investment targeting, etc. Include regional representation within committees. Establish a "special" Committee of Chairs of Advisory Committees to meet biannually to focus on national level issues/opportunities and report to the highest authorities.	1	01/04/2018	31/12/2020	<ul style="list-style-type: none"> Advisory committees established and operational. Quarterly meeting of advisory committees held and minutes compiled, shared with EDB Board, Minister and, as required, National Economic Council Biannual meeting of Committee of Chairs held and minutes compiled, shared with Minister and National Economic Council 	Export Development Board	Ministry of Development Strategies and International Trade; Exporters Association of Sri Lanka; The Ceylon National Chamber of Industries; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Department of Commerce	50,000	Boat building; 2.4.1: IT-BPM; 1.1.1; Logistics; 1.2.1; Electrical and electronic components; 1.3.2; Processed foods and beverages; 3.7.2; Trade information and promotion; 1.3.2; Spices and concentrates; 1.2.1

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
1. To have business-enabling, predictable and transparent policy and regulatory framework that supports exports.	1.1: Establish institutional, public and private coordination for effective trade policy, design, formulation and execution	1.1.4 Ensure the land bank initiative is implemented in a timely manner to facilitate access to land for focus export sectors and supply chains (direct and indirect). Ensure land needs of NES focus sectors (Boat, IT, Processed food, and logistics, etc.) are properly considered. Ensure a clear process and policy for land allocation is defined and transparent. See sector/TSFs strategies for more details	1	01/04/2018	31/12/2020	<ul style="list-style-type: none"> Land bank established and responding to NES focus sector requirements 	To be finalized by Ministry of Lands and Parliamentary Reforms	Ministry of Development Strategies and International Trade; Ministry of Finance; Ministry of Provincial Councils and Local Government; Ministry of Megapolis and Western Development	350,000	Boat building: 1.3.1; Processed foods and beverages: 2.1.1; Logistics: 1.1.8
	1.2: Restructure and streamline Sri Lanka's regulatory framework to ensure transparency and minimize overlapping mandates to meet the modern demands of exporting	1.2.1 Ensure amendment of the following regulations and acts that are currently impeding NES focus sectors and TSFs growth. See individual sectors and TSFs for more details: <ul style="list-style-type: none"> Quarantine and Prevention of Diseases Ordinance (Processed Food and Beverages, Spices, Quality) Customs Ordinance No. 17 of 1869 (Logistics) Civil Aviation Act No. 14 of 2010 (Logistics) Food Act No. 26 of 1980 (Processed Food and Beverages, and Quality) Finance Act No. 12 of 2013 (Logistics) Merchant Shipping Act No. 52 of 1971 (Logistics) VAT Act No. 14 of 2002 (IT-BPM) Fauna and Flora protection Act No. 22 of 2009 (Boat Building) Insurance and Industry Act No. 43 of 2000 (Boat Building) Ayurveda Act No. 31 of 1961 (Wellness Tourism) Universities Act No. 16 of 1978 (IT-BPM and Electronic and Electrical components) Companies Act No. 7 of 2007 (IT-BPM) Additional amendments may be suggested through Advisory Committees	1	01/06/2018	31/12/2022	Following regulations amended <ul style="list-style-type: none"> Quarantine and Prevention of Diseases Ordinance (Processed Food and Beverages, Spices, Quality) Customs Ordinance No. 17 of 1869 (Logistics) Civil Aviation Act No. 14 of 2010 (Logistics) Food Act No. 26 of 1980 (Processed Food and Beverages, and Quality) Finance Act No. 12 of 2013 (Logistics) Merchant Shipping Act No. 52 of 1971 (Logistics) VAT Act No. 14 of 2002 (IT-BPM) Fauna and Flora protection Act No. 22 of 2009 (Boat Building) Insurance and Industry Act No. 43 of 2000 (Boat Building) Ayurveda Act No. 31 of 1961 (Wellness Tourism) Universities Act No. 16 of 1978 (IT-BPM and Electronic and Electrical components) Companies Act No. 7 of 2007 (IT-BPM) 	<ul style="list-style-type: none"> Ministry of Development Strategies and International Trade NES Management Unit 	Ministry of Industry and Commerce; Ministry of Development Strategies and International Trade; Ministry of Transport and Civil Aviation; Ministry of Agriculture; Ministry of Telecom-munication and Digital Infrastructure; Ministry of Finance; Ministry of Higher Education and Highways; Ministry of Ports and Shipping; Sri Lanka Customs; Ministry of Mahaweli Development and Environment; Ministry of Health, Nutrition & Indigenous Medicine	100,000	IT-BPM: 1.3.1, 1.3.2, 1.4.1; Logistics: 1.1.5, 1.1.3, 1.1.14; Processed foods and beverages: 1.1.1
		1.2.2 Review labour regulations, including the Employment of women, young persons and children Act No. 24 of 2006, to adjust the compensation formula and facilitate night shift approval procedures for women.	1	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Labour regulations updated 	Department of Labour	Ministry of Development Strategies and International Trade; The Employers' Federation of Ceylon; SLASSCOM	50,000	IT-BPM: 1.3.3; Processed foods and beverages: 1.3.2

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
1. To have business-enabling, predictable and transparent policy and regulatory framework that supports exports.	1.2: Restructure and streamline Sri Lanka's regulatory framework to ensure transparency and minimize overlapping mandates to meet the modern demands of exporting	1.2.3 Ensure streamlining of gazettement of the following regulations and operational guidelines: <ul style="list-style-type: none"> Electronic Transactions Act, including e-payment, e-signature, e-documents and tracking (NES) Ayurveda Act (Wellness tourism) Trade Remedy Law 	1	01/06/2018	31/12/2022	<ul style="list-style-type: none"> Guidelines for the Electronic Transactions Act in place Ayurveda Act gazetted Trade Remedy Law gazetted and operational guidelines published 	<ul style="list-style-type: none"> Ministry of Development Strategies and International Trade NES Management Unit 	Ministry of Telecommunication and Digital Infrastructure; Ministry of Ports and Shipping; Information and Communication Technology Agency (ICTA); Department of Commerce; Ministry of Health, Nutrition & Indigenous Medicine	20,000	Wellness tourism: 2.3.2; Logistics: 1.1.12
		1.2.4 Ensure development of the following new regulations: <ul style="list-style-type: none"> Develop new maritime anti-trust laws in line with international best practices to establish Sri Lanka as a maritime nation. Draft an umbrella law defining the whole NQI and institutions' interactions, including conformity assessment. 	2	01/04/2019	31/12/2022	<ul style="list-style-type: none"> Recreational crafts regulatory framework for navigation Maritime anti-trust laws developed and gazetted NQI law developed and gazetted 	<ul style="list-style-type: none"> Ministry of Development Strategies and International Trade NES Management Unit 	Ministry of Ports and Shipping; Ministry of Science, Technology and Research	50,000	Boat building: 1.1.1; National quality infrastructure: 1.2.3; Logistics: 1.1.11
		1.2.5 Amend the Sri Lankan visa regime along the following lines: <ul style="list-style-type: none"> Include fast-tracking of visa and other residency requirements for diaspora. (IT-BPM) Facilitate short-term business visas for disaster recovery/business continuity services (IT-BPM) Amend the immigration regulation by introducing new visit purposes categories: wellness, Ayurvedic treatment, medical and hospitalization, transit. (Wellness tourism) 	2	01/04/2019	31/12/2021	<ul style="list-style-type: none"> Fast-track visa and other residency requirements for diaspora available. (IT-BPM) Short-term business visas for disaster recovery/business continuity services facilitated (IT-BPM) Immigration regulation for wellness, Ayurvedic treatment, medical and hospitalization, etc. available (wellness tourism) 	Department of Immigration and Emigration	Ministry of National Policies and Economic Affairs; Ministry of Industry and Commerce; Ministry of Development Strategies and International Trade; Exporters Association of Sri Lanka, Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	20,000	IT-BPM: 2.3.1, 3.3.2; Wellness tourism: 3.4.1

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
1. To have business-enabling, predictable and transparent policy and regulatory framework that supports exports.	1.2: Restructure and streamline Sri Lanka's regulatory framework to ensure transparency and minimize overlapping mandates to meet the modern demands of exporting	1.2.6 Ensure the following regulatory modifications are completed to ease investment inflow to NES focus sectors: <ul style="list-style-type: none"> • Modify BOI legislation (section 16 of the Board of Investment Law No. 4 of 1978 (BOI Law)) to allow subleasing of space to partners by setting up a joint venture (Boat Building) • Regulatory constraints on closing down a business – closing down fee and directors' personal liability. (IT-BPM and Electronic and electrical components) • University Grants Commission Act to make it easier for university companies to invest and operate in Sri Lanka, to encourage hi-tech spin-offs. (IT-BPM and Electronic and electrical components) • Approval of construction permits in the Wellness tourism and health sectors (based on developed national standards). (Wellness Tourism) 	1	01/04/2018	31/12/2020	Amendments to necessary acts and regulations completed, including Section 16 of the BOI Law on joint ventures	Ministry of Development Strategies and International Trade	Central Bank of Sri Lanka; Ministry of Industry and Commerce; Ministry of Finance; Ministry of Higher Education and Highways; Board of Investment (BOI)		Wellness tourism: 2.3.4; Boat building: 1.1.5; IT-BPM: 1.2.3, 1.3.6
		1.2.7 In line with Trade Facilitation Agreement, make it mandatory for all border agencies to publish regulation procedures, applicable fees and timelines.	1	01/04/2018	31/12/2020	• Regulations published	Department of Commerce	Ministry of Development Strategies and International Trade; Sri Lanka Customs; Ceylon Chamber of Commerce (CCC)	30,000	
	1.3: Channel exporters' concerns into trade negotiations	1.2.8 Establish a provision of a sufficient grace period for the private sector to adapt to the relevant regulatory reviews (with the exception of the regulations that do not allow for advance notice, e.g. positive changes in Customs duties or additional charges). Put in place a notification system once new regulations are issued.	3	01/04/2018	31/12/2022	• Grace period in place, giving enterprises adequate time to comply with new regulations after their adoption	Ministry of Development Strategies and International Trade	Ministry of Industry and Commerce; Ministry of Finance; Sri Lanka Customs		
		1.3.1 Establish systematic and formalized private sector consultations, in coordination with advisory committees, prior to trade negotiations, and gather the necessary information to build the case for the negotiation.	2	01/04/2018	31/12/2022	• Systematic consultations held in advance of any trade negotiations with relevant industries advisory committees.	Ministry of Development Strategies and International Trade	Export Development Board; Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FC-CISL); Department of Commerce	50,000	Processed foods and beverages: 3.5.2

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
1. To have business-enabling, predictable and transparent policy and regulatory framework that supports exports.	1.3: Channel exporters' concerns into trade negotiations	1.3.2 Provide regular capacity-building and develop guidelines for trade negotiators about multilateral trading systems and a trade negotiations framework.	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Annual training for trade negotiators completed Standardized methodology on trade negotiation defined and utilized 	Department of Commerce	Ministry of Development Strategies and International Trade; Export Development Board	30,000	
	1.4: Expand the export finance sector to provide everything required for a trade hub	1.4.1 Introduce new export finance solutions to improve exporters' competitiveness. Such new solutions include: <ul style="list-style-type: none"> Special export credit financing for SMEs willing to engage in exports. Value chain financing (especially directed towards agribusiness SMEs and farmers' associations, in order to mitigate price risks). Bilateral export credit lines and buyer credit to minimize risks in new target markets. Export factoring. Special credit schemes targeting first-time exporters as a special group. Funding could be provided through Exim Window of development bank.	1	01/04/2018	31/12/2022	All five new services introduced by 2022: <ul style="list-style-type: none"> Special export credit financing for SMEs willing to engage in exports. Value chain financing (especially directed towards agribusiness SMEs and farmers' associations, in order to mitigate price risks). Bilateral export credit lines and buyer credit to minimize risks in new target markets. Export factoring. Special credit schemes targeting first-time exporters as a special group. 	Ministry of Finance	Central Bank of Sri Lanka; Ministry of Development Strategies and International Trade	1,000,000	
		1.4.2 Set up a development bank, integrating an Exim window to provide exporter-specific services and particularly encourage new exporters and small exporters. The services in activity 1.4.1. could be integrated in this bank. Simultaneously to setting up the development bank, conduct a review and upgrading of Sri Lanka Export Credit Insurance Corporation guarantees to reduce the cost of export insurance premiums.	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Development bank set up, with Exim window operational SLEIC upgraded 	Ministry of Finance	Central Bank of Sri Lanka; Ministry of Development Strategies and International Trade; Sri Lanka Export Credit Insurance Corporation (SLEIC); Sri Lanka Banks Association	65,000,000	
		1.4.3 CBSL Governor to establish an export credit refinancing window to encourage banks to provide export credit in general and to NES sectors in particular.	1	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Export credit refinancing window operational Export credit finance solutions promoted to exporters through export promotion portal (EDB) 	Central Bank of Sri Lanka	Ministry of Development Strategies and International Trade; Ministry of Finance; Sri Lanka Export Credit Insurance Corporation (SLEIC); Sri Lanka Banks Association	5,000,000	

STRATEGIC OBJECTIVE 2: TO STRENGTHEN SRI LANKAN EXPORTERS' MARKET-ENTRY AND COMPLIANCE CAPACITIES.

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs and strategies
2: To strengthen Sri Lankan exporters' market-entry and compliance capacities.	2.1: Strengthen the quality infrastructure to support the compliance capacity of exporting companies	2.1.1 Establish the National Quality Council (NQC), with strong political backing, monitoring capabilities and decision-making power. Elaborate TOR, Constitution, and Budget allocated as indicated in NQP. The NQC should have real authority with proper governance and adequate financial and human resources. See National Quality Infrastructure Strategy for more details	1	01/04/2018	31/12/2018	<ul style="list-style-type: none"> NQC Established and operational 	Sri Lanka Standards Institution (SLSI)	Ministry of Fisheries and Aquatic Resources; Ministry of Development Strategies and International Trade; Ministry of Agriculture; Ministry of Plantation Industries; Ministry of Rural Economic Affairs; Sri Lanka Accreditation Board (SLAB); Export Development Board; Industrial Technology Institute (ITI); Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL); Department of Commerce; Ministry of Health, Nutrition & Indigenous Medicine; Measurement Units, Standards and Services Department (MUSSD); Ministry of Science, Technology and Research; Import and Export Control Department (IECD); Consumer Affairs Authority	2,000,000	National quality infrastructure: 1.1.1
		2.1.2 In order to reduce the costs and complications of testing, inspection and certification services for SMEs and exporters, establish use of public and mainly private Conformity Assessment Bodies. Support with demand schemes in accordance with national requirements. Support accreditation of third party private CABs, ensuring mutual recognition. See National Quality Infrastructure Strategy for more details	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> 30 new CAB accredited services per year (financial assistance to CABs to accredit + technical training) 	Ministry of Development Strategies and International Trade	Sri Lanka Accreditation Board (SLAB); Sri Lanka Standards Institution (SLSI); Export Development Board; Industrial Technology Institute (ITI); Arthur C Clarke Centre for Modern Technologies (ACCMT); Department of Commerce; Measurement Units, Standards and Services Department (MUSSD); Department of Agriculture; Sri Lanka Association of Testing Laboratories (SLATL)	500,000	National quality infrastructure: 2.1.1
		2.1.3 Establish a national database of existing conformity assessment capabilities in all accredited measurement laboratories and non-accredited third party CABs, universities, other research and development organizations, the military and specialized organizations such as Customs and food safety. This database should ensure information comparability and compatibility to be used in product traceability systems See National Quality Infrastructure Strategy for more details	1	01/04/2018	31/12/2022	<ul style="list-style-type: none"> National database in place 	Sri Lanka Accreditation Board (SLAB)	Sri Lanka Standards Institution (SLSI); Export Development Board; Industrial Technology Institute (ITI); Measurement Units, Standards and Services Department (MUSSD); Sri Lanka Association of Testing Laboratories (SLATL)	50,000	National quality infrastructure: 2.1.3

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
2: To strengthen Sri Lankan exporters' market-entry and compliance capacities.	2.1: Strengthen the quality infrastructure to support the compliance capacity of exporting companies	2.1.4 Establish a regular standards update mechanism to align with international standards updates. Support SLSI standardization committees and standardization units outside SLSI to cater to the needs of key sectors, including a comprehensive standard for social, environmental and ethical practices. NOC will lead implementation once established. See National Quality Infrastructure strategy for more details	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> 10 technical standards revised per year, in key sectors 	To be finalized by Ministry of Science, Technology and Research	Ministry of Plantation Industries; Sri Lanka Standards Institution (SLSI); Export Development Board; Industrial Technology Institute (ITI); Department of Commerce; Ministry of Health, Nutrition & Indigenous Medicine; Department of Agriculture; Coconut Research Institute (CRI)	500,000	National quality infrastructure: 3.2.1, 3.2.2
		2.1.5 Build the capacity of MUSSD to fulfil all requirements to include their Calibration and Measurement Capabilities (CMCs) in the Key Comparison Database (KCDB) (as part of the International Committee for Weights and Measures Mutual Recognition Agreement.) See National Quality Infrastructure strategy for more details	1	01/01/2018	31/12/2022	<ul style="list-style-type: none"> Ten CMCs, per year, are included in the KCDB 	Ministry of Industry and Commerce	Ministry of Development Strategies and International Trade; Sri Lanka Accreditation Board (SLAB); Sri Lanka Standards Institution (SLSI); Measurement Units, Standards and Services Department (MUSSD); Sri Lanka Association of Testing Laboratories (SLATL)	300,000	National quality infrastructure: 2.2.1
		2.1.6 Define and provide new accreditation services (e.g. certification of persons – ISO/IEC 17024; providers of proficiency testing schemes – ISO/IEC 17043; products, processes and services certification – ISO/IEC 17065; reference material producers – ISO 17034). Accredited institutions under the newly developed services. See National Quality Infrastructure strategy for more details	1	01/04/2018	31/12/2022	<ul style="list-style-type: none"> One new accreditation service per year Technical person hired to support SLAB 	Sri Lanka Accreditation Board (SLAB)	Ministry of Foreign Affairs; Export Development Board; Department of Commerce; Ministry of Science, Technology and Research	200,000	National quality infrastructure: 2.4.1
		2.2.1 To complement the trade portal, develop an "export promotion portal" to provide market intelligence to exporters. Appoint a working group to coordinate trade information provision and to develop the export promotion portal. Enable access to the export promotion portal for regional chambers of commerce (Jaffna, Galle, Kandy, Hambantota, Uva and other regions). See Trade Information and Promotion strategy for more details	1	01/04/2018	31/12/2022	Export promotion portal is operational based on ToRs defined by a technical team of trade information providers.	Export Development Board	Central Bank of Sri Lanka; Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL); Department of Commerce	700,000	Logistics: 1.1.4; Trade information and promotion: 1.1.2
	2.2: Ensure a constant flow of the latest trade information so exporting companies can adjust their offering									

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
2: To strengthen Sri Lankan exporters' market-entry and compliance capacities.	2.2: Ensure a constant flow of the latest trade information so exporting companies can adjust their offering	2.2.2 Implement a nationwide promotion campaign in English, Sinhala and Tamil, in both traditional and online media, to inform SMEs and exporters of available TIP services, and present the focal institutions at national and regional levels. See Trade Information and Promotion strategy for more details.	3	01/04/2019	31/12/2022	<ul style="list-style-type: none"> Targeted promotional campaign launched and implemented More SMEs access trade data and information 	Export Development Board	Central Bank of Sri Lanka; Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL); Department of Commerce	20,000	Trade information and promotion: 2.1.1
		2.2.3 Develop and roll out a standardized training course, periodically, to build the capacities of sector associations (e.g. Sri Lanka Energy Managers Association, Spice Council, etc.) and regional chambers in online research, data collection, market profiling, marketing / promotion techniques, and preparation for trade fairs. See Trade Information and Promotion strategy for more details.	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Standard simple training modules designed Training provided to Colombo-based associations and ToTs for regional outreach 	Export Development Board	Export Development Board; Exporters Association of Sri Lanka; National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL); Department of Commerce	100,000	Trade information and promotion: 2.2.1
	2.3: Create a genuine national image for customers abroad, built on branding and promotion	2.3.1 Support and enhance the already established 'national branding committee' composed of public and private stakeholders to develop the branding and marketing position, as well as sector sub-brands developed with advisory committees. See individual sector strategies and the Trade Information and Promotion strategy for more details.	1	01/04/2018	31/12/2020	<ul style="list-style-type: none"> The National Export and Investment Branding Committee is reinforced National export and investment branding position and material ready for dissemination Umbrella branding and sector sub-brands developed with advisory committees 	Export Development Board	Ministry of Industry and Commerce; Ministry of Foreign Affairs; Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	5,000,000	Boat building: 3.2.1; Electrical and electronic components: 1.2.2; IT-BPM: 4.2.1; Wellness tourism: 3.1.1, 3.2.1; Processed foods and beverages: 3.6.1; Trade information and promotion: 3.1.1; Logistics: 3.1.3

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs and strategies
2: To strengthen Sri Lankan exporters' market-entry and compliance capacities.	2.3: Create a genuine national image for customers abroad, built on branding and promotion	2.3.2 Expand trade information and promotion organisations' collaboration with Sri Lanka's foreign representations. Collaboration areas include: Channeling of first-hand trade intelligence from target markets, including regulatory changes; Organisation of B2B meetings with key buyers in target markets; Training and supporting commercial attachés' on promotion of key priority sectors, etc; organisation of a globally synchronized event to Brand Sri Lanka, its exports and investment opportunities; Identification of 'fairs' and commercial events in target markets related to priority export sectors with update of 'list of events' in the "export promotion portal". In cases where there is no trade attachés in a target market, appoint honorary councils to conduct trade promotion on behalf of the private sector See individual sector strategies and Trade Information and Promotion strategy for more details	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Representations actively promote investment and trade with Sri Lanka with the help of targeted support materials (brochures, etc.) Information channel mechanism established with key target markets Periodical event in foreign representations organised Information about new fairs channeled to "export promotion portal" 	Department of Commerce	Ministry of Industry and Commerce; Ministry of Foreign Affairs; Board of Investment (BOI); Export Development Board; Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	2,000,000	Boat building: 3.1.2; Wellness tourism: 2.4.1, 3.5.2; Processed foods and beverages: 3.7.1; Trade information and promotion: 1.2.2, 3.1.2, 3.2.1, 3.2.2; IT-BPM: 2.1.3; Logistics: 3.1.2; Spices and concentrates: 3.1.2
		2.3.3 Build up and organise annual international trade fair(s) in Sri Lanka, inviting importers and buyers from all over the world to expose Sri Lankan brands. See individual sector strategies and Trade Information and Promotion strategy for more details					Export Development Board	Ministry of Development Strategies and International Trade; Ministry of Finance; Board of Investment (BOI); Arthur C Clarke Centre for Modern Technologies (ACCMT); Exporters Association of Sri Lanka; National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	500,000	Electrical and electronic components: 2.1.2; Boat building: 3.1.3; Trade information and promotion: 3.1.3

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
2: To strengthen Sri Lankan exporters' market-entry and compliance capacities.	2.4: Strengthen IP protection for Sri Lankan exports	2.4.1 Build up value creation through intellectual property: <ul style="list-style-type: none"> Review the IP registration legal regime to fast-track the IP protection process for enterprises. Add missing IP registration tools such as GIs, collective marks and database protection. Identify suitable IP rights to provide protection to newly developed products and develop international strategies for registration of brands (trademarks, collective marks, or patents in case of inventive products). See individual sector strategies and Trade Information and Promotion strategy for more details	1	01/04/2018	31/12/2022	<ul style="list-style-type: none"> IP registration regime streamlined Support provided on IP registration for focus export industries. 	National Intellectual Property Office	Export Development Board; Department of Commerce	100,000	Electrical and electronic components: 2.2.3; Wellness tourism: 2.1.2; Processed foods and beverages: 3.1.6; IT-BPM: 1.4.2; Spices and concentrates: 3.2.2
		2.4.2 Achieve membership of the Madrid and Lisbon agreements to increase access and protection for trademarks and patents.	2	01/01/2019	31/12/2022	Sri Lanka is member of the Madrid and Lisbon agreements	National Intellectual Property Office	Ministry of Industry and Commerce; Ministry of Development Strategies and International Trade	50,000	

STRATEGIC OBJECTIVE 3: TO BECOME AN EFFICIENT TRADE AND LOGISTICS HUB TO FACILITATE EXPORTS.

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
3: To become an efficient trade and logistics hub to facilitate exports	3.1: Provide adequate facilities and systems to increase the number and quality of logistics operations	3.1.1 Carry out a feasibility study (private sector experts and University of Moratuwa) on the necessity of installing multi-user facilities to provide temperature-controlled storage (bonded logistics centres). Release of reefer storage, using reefer containers in ports and creation of multi-user facilities, cold storage, etc. would help transportation and collection of perishables and the food processing sector, which currently suffers a high percentage of post-harvest losses. Implement recommendations.	2	01/04/2018	30/06/2019	<ul style="list-style-type: none"> Feasibility study completed Recommendations implemented 	Ministry of Finance	Ministry of National Policies and Economic Affairs; Ministry of Higher Education and Highways; Ministry of Ports and Shipping; Ministry of Mahaweli Development and Environment; Ministry of Lands and Parliamentary Reforms	50,000	Logistics: 2.2.2
		3.1.2 Formulate an action plan to build scale and volume through key performance indicators and ensure implementation. For this, all Government institutions related to TF (SLPA, MoPS) to develop and maintain key performance indicators to monitor institutions' performance and to improve the country's LPI, Ease of Doing Business and Global Competitiveness Index rankings. Link to Logistics strategy for more details	1	01/05/2018	31/12/2022	<ul style="list-style-type: none"> Action plan developed and implemented KPI developed under each institution 	Ministry of Development Strategies and International Trade	Ministry of National Policies and Economic Affairs; Ministry of Finance; Ministry of Ports and Shipping; Exporters and Association of Sri Lanka; The Ceylon National Chamber of Industries; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE)	30,000	Logistics: 2.2.3
		3.1.3 Finalize and implement the single window system road map (currently being completed) to establish a centralized system to execute all documents related to foreign trade operations. Align institutional foundation legislation to enable institutions to use the system. Standardize and unify the documents and data requested by all governmental agencies to enter the single window. In connection to this, develop a database of documents issued for foreign trade operations.	1	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Single window established and coordination mechanism in place 	Ministry of Development Strategies and International Trade	Ministry of Finance; Sri Lanka Customs; Export Development Board; Department of Commerce	2,000,000	
		3.1.4 Establish an integrated multi-modal connectivity network through attracting investment (PPPs) to increase a rail network between ports, airports and commercial hub zones and facilitate fast transfer of sea/air cargo. See Logistics strategy for more details	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Multi-modal plan developed Investment profiles prepared and one roadshow organized in a targeted country 	Ministry of Megapolis and Western Development	Ministry of National Policies and Economic Affairs; Ministry of Transport and Civil Aviation; Ministry of Ports and Shipping; Ministry of Foreign Affairs	500,000	Logistics: 3.2.1

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
3: To become an efficient trade and logistics hub to facilitate exports	3.2: Diversify logistics services and expand logistics operations	3.2.1 Create the right ecosystem to attract more investment into logistics (regional or subregional headquarters and operational hubs of multinational corporations to locate in Sri Lanka). Equity, tax and other constraints should be removed to encourage more capital inflows to Sri Lanka. See Logistics strategy for more details	1	01/04/2018	31/12/2019	Current regulations are under MoPS. Gazettes, regulations, and guidelines issued by the Merchant Shipping Division, BOI and CBSL should be amended	Ministry of Finance	Ministry of National Policies and Economic Affairs; Ministry of Development Strategies and International Trade; Ministry of Transport and Civil Aviation; Ministry of Ports and Shipping; Board of Investment (BOI)		Logistics: 1.1.9
		3.2.2 Build up Commercial Hub activities by updating the Finance Act 12/2012-2013 to facilitate establishment and operations, maintaining tax structure relevant to commercial hub operators at 0% as originally established and intended, and ensure a level playing field for new entrants in comparison to other competing nations. See Logistics strategy for more details	1	01/01/2018	31/12/2018	<ul style="list-style-type: none"> Finance Act, No. 12 of 2013 and Finance Act – Commercial Hub Regulation No. 1 of 2013 amended Zero per cent interest rate for commercial hub activities kept 	<ul style="list-style-type: none"> Department of Fiscal Policy MoF 	Ministry of Development Strategies and International Trade; Board of Investment (BOI); Export Development Board		Logistics: 1.1.6, 1.1.7
		3.2.3 Establish and promote private zones under the BOI regulations in order to create logistics and warehousing 'plug and play' facilities. See Logistics strategy for more details	1	01/04/2018	31/12/2020	<ul style="list-style-type: none"> Zones for 'plug and play' logistics and warehousing operations allocated Investment promotion activities carried out 	Ministry of Development Strategies and International Trade	Ministry of National Policies and Economic Affairs; Ministry of Finance; Board of Investment (BOI)	30,000,000	Logistics: 2.2.4
	3.3: Increase shipping capacities to take advantage of regional trade flows	3.3.1 Increase logistics cargo handling capacities in the Port of Colombo and the Bandaranaike International Airport (BIA) by expediting all port-related developments, particularly the completion of the East Terminal and legislative amendments to expand Airports' cargo and passenger handling services through private investments/public-private partnerships (PPPs). See Logistics strategy for more details	1	01/04/2018	30/06/2019	<ul style="list-style-type: none"> Decision about allocation of Colombo East Terminal contract taken Amendments to Acts 	Ministry of Ports and Shipping	Ministry of Industry and Commerce; Ministry of Transport and Civil Aviation; Ministry of Megapolis and Western Development	100,000	Logistics: 3.2.2, 1.1.15
		3.3.2 Diversify shipping beyond containerized cargo and related ancillary services to increase the activity level of non-containerized cargo in ports of Sri Lanka. The overall programme should work towards increasing all types of ships calling at Sri Lankan ports. See Logistics strategy for more details	2	01/04/2019	31/12/2022	<ul style="list-style-type: none"> Feasibility studies completed Blueprint incorporated through the national ports and shipping policy Call for expression of interest announced 	Ministry of Ports and Shipping	Ministry of National Policies and Economic Affairs; Ministry of Finance	150,000	Logistics: 3.2.4

STRATEGIC OBJECTIVE 4: TO DRIVE EXPORT DIVERSIFICATION THROUGH INNOVATION AND BY STRENGTHENING EMERGING EXPORT SECTORS.

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
4: To drive export diversification through innovation and the strengthening of emerging sectors.	4.1: Attract investment into promising new sectors to spur economic diversification	4.1.1 BOI to proceed with investment targeting to attract investors not only in established but also in NES focus sectors. Develop an annual investment targeting plan in line with the guidance of relevant advisory committees. This included the development a support mechanism, such as an investment planning unit, to bring in foreign joint ventures with Sri Lankan export-oriented companies and develop feasibility studies in this regard. See individual sector and TSF strategies for more details	1	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Investment targeting materials developed every year, as per new trends identified Five investors reached per year per sector/TSFs 	Board of Investment (BOI)	Ministry of Development Strategies and International Trade; Ministry of Foreign Affairs; Export Development Board; Sri Lanka Tourism Development Authority; Exporters Association of Sri Lanka; Sri Lanka Food Processors Association; Spice Council; SLASSCOM; The Ceylon National Chamber of Industries; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL); Boat Building Technology Improvement Institute (BTI); Department of Commerce; Sri Lanka Electronics Manufacturers and Exporters Association	350,000	Boat building: 2.1.1, 1.3.2, 2.1.2; IT-BPM: 1.2.1; Electrical and electronic components: 1.2.1, 2.3.2; Logistics: 3.2.3, 3.2.5; Spices and concentrates: 3.1.1
	4.2: Proactively improve national skills development for emerging export sectors	4.2.1 Develop a skills-building programme to address workforce shortages in all NES sectors, including introducing NES sectors' requirements in curriculum of technical, vocational and higher education institutions, and updating teaching faculties' knowledge about NES sectors' needs. See individual sectors and TSF strategies for more details	2	01/04/2018	31/12/2022	Skills-building programme developed for all NES sectors, including development of new curricula and professors' training	Ministry of Skills Development and Vocational Training	Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	1,000,000	Processed foods and beverages: 3.4.1, 3.4.2; Electrical and electronic components: 4.1.2, 4.1.3; IT-BPM: 3.2.1, 3.2.6
		4.2.2 Improve interaction between industry and academic and research institutions in priority export sectors to increase the reactivity and adaptation of appropriate research institutions to private sector needs. See individual sectors and TSF strategies for more details	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> Dialogue and exchange mechanisms established in priority export sectors 	Ministry of Higher Education and Highways	Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	100,000	Boat building: 2.2.1; Electrical and electronic components: 4.2.1; IT-BPM: 3.2.3
		4.2.3 Conduct an awareness-raising campaign in schools, technical and vocational training institutions and universities about employment opportunities and career options in emerging export sectors for employment generation. See individual sectors and TSF strategies for more details	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> One annual awareness-raising campaign conducted for each sector 	Ministry of Higher Education and Highways	Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCISL)	50,000	Wellness tourism: 3.3.1; Boat building: 2.2.2; Electrical and electronic components: 4.1.1; Logistics: 2.1.1

Strategic objectives	Operational objectives	Activity	Priority	Start date	End date	Targets	Leading implementing partner	Supporting implementing partners	Indicative costs (USD)	Link with sector and TSFs strategies
4: To drive export diversification through innovation and the strengthening of emerging sectors.	4.3: Reorient R&D and innovation initiatives to support the needs of NES sectors	4.3.1 Provide targeted funding for specialized R&D, new product development, innovation, testing and certification, and IP protection and commercialization for NES priority sectors, as well as other export sectors. Multiple mechanisms to be used – ranging from voucher schemes to matching grants, enterprise innovation schemes, and collaborative innovation schemes. These are to be in line with the forthcoming I&E Strategy. See individual sectors and TSF strategies for more details	1	01/04/2018	31/12/2021	Conditional funding mechanism in place	Ministry of Development Strategies and International Trade	Ministry of Finance; Ministry of Science, Technology and Research	10,000,000	Boat building: 2.3.1; Electrical and electronic components: 2.2.2, 3.1.2
		4.3.2 Develop partnerships between Sri Lankan universities and research institutions with international leading universities to drive innovation and R&D. See individual sectors and TSF strategies for more details	2	01/04/2018	31/12/2022	Two partnerships established per sector Two collaborative R&D projects per sector Two technology transfers per sector	Ministry of Higher Education and Highways	Board of Investment (BOI); Export Development Board; Exporters Association of Sri Lanka; Ceylon Chamber of Commerce (CCC); National Chamber of Exporters of Sri Lanka (NCE); Federation of Chambers of Commerce in Sri Lanka (FCCSL)	50,000	Electrical and electronic components: 4.2.2; IT-BPM: 3.2.5
	4.4: Support the integration of SMEs into the economy, including in the regions, and support the establishment of start-ups	4.4.1 Support the emergence of start-ups in NES priority sectors, with support given for funding / credit guarantees, incubation facilities and common service centres; and technology advisory support services to upgrade SMEs as well as specialized market access schemes. This is aligned to the forthcoming I&E Strategy. See sector strategies and TSFs for more details	2	01/04/2018	31/12/2022	<ul style="list-style-type: none"> At least 400 SMEs supported At least 100 start-ups supported 	Export Development Board	Ministry of Development Strategies and International Trade; Ministry of Finance	10,000,000	Electrical and electronic components: 2.2.1; IT-BPM: 2.2.4



APPENDICES

APPENDIX 1: LIST OF PARTICIPANTS IN THE NES PROCESS

No.	Name	Designation	Organization
1	Mr. Daya Wahalantantiri	Executive Director	ACL Cables PLC
2	Mr. S.Kariharakanapathy	Head Of the Department/IT	Advanced Technical Institute
3	Mr. Y.Thishanthan	Assistant Registrar	Advanced Technical Institute
4	Eng. S. Prabhakar	Representative	Ministry of Development Strategies & International Trade
5	Mr. Thiriyambaga Sharma	IT Executive	Agoysoft (Pvt) Ltd
6	Mr. T. Kiritharan	Asst.Director	Agriculture & Agrarian Insurance Board
7	Mr. K.V.P. Ranjith De Silva	Vice Chairman	Airport & Aviation Services (Sri Lanka) Limited
8	Mr. D.J.U.Purasinghe	Senior Assistant Airport Manager	Airport & Aviation Services (Sri Lanka) Limited
9	Mr. Wasantha Kumara Jayasena	Chief Executive Officer	Ampara District Chamber of Commerce Industry and Agriculture
10	Mr. Kingsley Abeywickrama	Managing Director	APL Lanka (Pvt) Ltd
11	Mr. Ishan Kannangara	Director- Marketing	Apps Technologies (Pvt) Ltd
12	Mr. S.A. Welikala	Senior Deputy Director (Industrialization)	Arthur C Clarke Institute for Modern Technologies [ACCIMT]
13	Ms. Thusitha Molligode	Senior Private Sector Development Officer (PPP Focal Point)	Asian Development Bank (ADB)
14	Ms. Angela Croslin	Project Analyst	Asian Development Bank (ADB)
15	Mr. D. Thudewattage	Head International Marketing & TQM	Associated Battery Manufacturers (Ceylon) Ltd
16	Mr. Nimal Ameresekere	Chairman	Association of Container Transporters (ACT)
17	Mr. Aruna Fernando	Secretary General	Association of Professional Bankers Sri Lanka
18	Dr. R.L. Ranasinghe	Registrar	Ayurvedic Medical Council
19	Mr. Danister L. Perera	Former Registrar-Medical Council	Ayurvedic Medical Council
20	Mr. Pierre Pringiers	CEO	BAFF Polymech (Pvt) Ltd
21	Mr.K.M.S.K.Weerawardana	General Manager	BAFF Polymech (Pvt) Ltd
22	Mr. Kaushall Rajapaksa	Director	BAFF Polymech (Pvt) Ltd
23	Mr. Gamini Rajapakse	Manufacturing/ Health and Safety Manager	Balfour Beatty Engineering Services Ceylon (Pvt) Limited
24	Dr. Mrs. Swarna Kaluthotage	Director	Bandaranayeka Memorial Ayurvedha Research Institute
25	Dr. D.H. Thennakoon	Medical Officer	Bandaranayeka Memorial Ayurvedha Research Institute
26	Ms. A.D.S. Indrani	Assistant General Manager-Trade Services	Bank of Ceylon
27	Ms. Geetha Karandawala	Director	Barberyn Ayurveda Resort
28	Mr. Buwanake Kulatilleke	Owner's Representative	Barberyn Beach Ayurveda Resort
29	Mr. Udaya De Silva	DGM -Business Development	Bartleet Electronics (Pvt) Limited
30	Mr. M.H.M. Naleem	Vice President	Batticaloa District Chamber of Commerce Industry and Agriculture
31	Mr. Rezvan Rasheed	Managing Director	BAZ World
32	Mr. Dilantha De Silva	Chief Operating Officer	Bio Extracts Pvt Ltd
33	Mr.A.G. Abubucker	Head of International Sales	Bio Extracts Pvt Ltd
34	Dr. Sarath Ranaweera	Chairman	Bio Foods (Pvt) Ltd
35	Mr. Nihal Rathnayake	Cooperate Management Consultatnt	Bio Foods (Pvt) Ltd
36	Ms. Asoka Malkanthi Jayakody	Director (Research & Policy Advocacy)	Board of Investment
37	Mr W. U. K. M. A. Wijayakulathilaka	Director - (Investment Appraisal) - Manufacturing	Board of Investment (BOI)

No.	Name	Designation	Organization
38	Mr. M.J.K. Mohottala	Director (Kandy Export Processing Zone)	Board of Investment - Kundasale
39	Ms. Nilupul De Silva	Director - Promotion	Board of Investment (BOI)
40	Major G. Dahanayaka	Director	Board of Investment -Koggala
41	Mr N. N. Kumaratunga	Director - (Investment Appraisal) - Services & Utilities Sector	Board of Investment (BOI), responsible for EPZs and Commercial hubs (Commercial hub section)
42	Mr. Jayamenon	Senior Deputy Director	Board of investment - Jaffna
43	Mr. Ananda K. Rajakaruna	Senior Deputy Director	Board of Investment (BOI)
44	Ms. Renuka Dasanayake	Deputy Director (Investment Appraisal)	Board of Investment (BOI)
45	Mr. D.M.N. Dissanayake	Deputy Director- Investment Appraisal	Board of Investment (BOI)
46	Mr. A S Subasinghe	Assistant Director	Board of Investment (BOI)
47	Ms. Lakmali Withange	Assistant Director- Investment	Board of Investment (BOI)
48	Mr. Sudath Jayasekera	Assistant Director	Board of Investment (BOI)
49	Mr. W S Alwis	Assitant Director	Board of Investment (BOI)
50	Mr. P.W. Senevirathna	Asst.Director	Board of Investment -Koggala
51	Mr. Viran Fernando	Assistant Director	BOI
52	Mr. Anuruddha Perera	Project Officer- Investment Appraisal	Board of Investment (BOI)
53	Ms. Jeewani Sewwandi Liyanapathirana	Research Officer	Board of Investment (BOI)
54	Ms. K. Ranatunga	Admin.Officer	Board of Investment -Koggala
55	Mr. H M Jayasundara		Board of Investment - Kundasale
56	Mr. Gamini Herath	Managing Director	Boat Building Technology Improvement Institute (BTI)
57	Mr. Priyantha Weeratunga	Course Director Director	Boat Building Technology Improvement Institute (BTI) Paramount Rectagg (Pvt) Ltd
58	Dr. R.A.U.C. Ranasinghe	Chairman	C.R.Exports (Pvt.) Ltd.
59	Mr. Keerthi Bandara	CFO/Executive Director	Camso Loadstar (Pvt) Ltd SLAMERP
60	Mrs. W A Dilrukshini	Additional Director	Central Bank
61	Mr. M.S. Hadunge	Senior Asst.Director	Central Bank
62	Mr. M.A.C. Najeep	Director (Northern)	Central Environmental Authority
63	Mr. S. Sayakkara		Central Province Women's Chamber of Small Industries and Commerce
64	Mrs. Shirley Jayawardane	Chairperson	Central Province Women's Chamber of Small Industries and Commerce
65	Ms. M. Ariyaratne		Central Province Women's Chamber of Small Industries and Commerce
66	Mr. Lalantha Fernando	Group Director	Ceyline Eng. Services (Pvt) Ltd
67	Ms. Sheamalee Wickramasingha	Group Managing Director	Ceylon Biscuits Ltd.
68	Mr. Nadeeja Karunathilaka	General Manager- International Market Development	Ceylon Biscuits Ltd.
69	Ms. Lilakshini de Mel	Senior Assistant Secretary General	Ceylon Chamber of Commerce
70	Mr. Shiran Fernando	Chief Economist	Ceylon Chamber of Commerce
71	Ms. Jayani Ratnayake	Economist	Ceylon Chamber of Commerce
72	Ms. Manori Dissanayaka	Assistant Secretary General	Ceylon Chamber of Commerce
73	Mr. Dinesh De Silva	Chairman - Import Section	Ceylon Chamber of Commerce
74	Mr. Buddhika Abayakoon	Head of International Marketing Consumer Food Sector	Ceylon Cold Stores PLC
75	Mr. Dammika Kapukotuwa	Director	Ceylon CyberCom (Pvt) Ltd
76	Mr. Kapila Fernando		Ceylon Electricity Board

No.	Name	Designation	Organization
77	Mr. Ronald		Ceylon Electricity Board
78	Mr. S.P.A. Dahanayaka	Habour Manager	Ceylon Fishery Harbour Cooperation
79	Mr. P. Hettiarachchi	Habour Manager	Ceylon Fishery Harbour Cooperation
80	Mr. D.N. Dissanayaka	Habour Manager	Ceylon Fishery Harbour Cooperation
81	Mr. Nuwan Jayasinghe	Manager - Operations	Ceylon Fishery Harbours Corporation
82	Ms. Chitra Jayasinghe	Deputy General Manager	Ceylon Shipping Corporation Ltd
83	Mrs. Yamuna Wettasinghe	Assistant General Manager(Business Development & Marketing)	Ceylon Shipping Corporation Ltd
84	Mr. S.M. Jayaratne	Design Engineer	Cey-Nor Foundation Ltd.
85	Mr. Ashoka Abeywickrama	Chief Executive Officer	Chamber of Commerce & Industry of Central Province
86	Mr. T. Jurison Jenaraj	CEO	Chamber of Commerce & Industries of Yalpanam
87	Mr. H.M. Sudath Wickramathissa	CEO	Chamber of Provincial Entrepreneurs (COPE)
88	Mr. Nimalan Karthikeyan	Strategic Advisor	Chief Minister Office -Nothorn Province
89	Ms. I.V.N. Preethika Kumudinie	Deputy Chief Secretary (Planning) /SP	Chief Secretary's Office - Galle
90	Mrs. M.S. Darmasena		Chief Secretary's Office - Kandy
91	Mr. K.G.S. Nishshanka	D .C.S Planning	Chief Secretary's Office - Kandy
92	Mr. Pardeep Rajapaksha	Assistant Director	Chief Secretary's Office - Kandy
93	Mr. Sarada de Silva	Chairman	Cinnamon Training Academy
94	Prof. Jayasiri Lankage	Managing Director	Cinnamon Training Academy
95	Mr. Ananda Kularathna	Managing Director	Citro Essencial Oil (Pvt) Ltd.
96	Mr. Lahiru Samaranayeka	F & B Manager	Club Palm Bay Hotel
97	Mr. Lalith Kumarasinghe		Club Palm Bay Hotel
98	Mr. Sampath Samarawickrama	Director- Market Development & Research	Coconut Development Authority
99	Mrs. Wasula Herath	Assistant Director - Marketing Development & Research	Coconut Development Authority
100	Dr. I.M.S.K. Idirisinghe	Head- Agriculture Economics Division	Coconut Research Institute.
101	Mr. S. Shanthakumar	Additional Director	College of Technology Jaffna
102	Mr. Lal Hettiarachchi	General Manager(Ship Building)	Colombo Dockyard PLC (CDPLC)
103	Mr. D.L. Darshana Chandrasekara	Head of Marketing- Ship Repairs	Colombo Dockyard PLC (CDPLC)
104	Mr. W.M.M.A. Weerasinghe	Engineer-Estimating & Invoicing	Colombo Dockyard PLC (CDPLC)
105	Dr. E. K. D. Lalith Edirisinghe	Associate Dean	Colombo International Nautical & Engineering College (CINEC) -Faculty Of Management, Humanities & Social Science
106	Mr. Anslem Perera	Chairman	Colombo Tea Traders' Association
107	Ms. Chandrika Thilakarathne	Director - Consumer Affairs & Information	Consumer Affairs Authority
108	Mr. Dharmasiri Alahakoon	Chairman/ Joint Managing Director	Country Style Foods (Pvt.) Ltd
109	Mr. Sarath W. Alahakoon	Chairman/ Joint Managing Director	Country Style Foods (Pvt.) Ltd
110	Dr. Dan Malika Gunasekera	Legal Counsel/Legal Consultant Former Executive Director	Danmar Ceylon Shipping Corporation
111	Mr. H.R.P. Fernando	Deputy Director	Department of Agriculture
112	Dr. P.V. Sriyalatha	Chief Animal Quarantine Officer	Department of Animal Production & Health
113	Dr. U.S.Gunarathna	Animal Quarantine Officer	Department of Animal Production & Health
114	Dr. J. Malathy	Animal Quarantine Officer	Department of Animal Production & Health
115	Dr. I.D.V.L. Dharmawardhana	Animal Quarantine Officer	Department of Animal Production & Health
116	Dr. Parakrama Wijayanaga	Doctor in Ayurveda	Department of Ayurveda
117	Mr. P.M.PANura Kumara	Additional DG	Department of Census and Statistics Sri Lanka

No.	Name	Designation	Organization
118	Mr. D.M.N. Bandara	Senior Statistician	Department of Census and Statistics Sri Lanka
119	Ms. Ishanthi Kulathilake	Senior Statistician	Department of Census and Statistics Sri Lanka
120	Ms. Chamini Wijayapala	Statistician	Department of Census and Statistics Sri Lanka
121	Ms. Gothami Silva	Director of Commerce	Department of Commerce
122	Mr. H.M.B. Herath	Director of Commerce	Department of Commerce
123	Mr. G.L. Gnanatheva	Deputy Director	Department of Commerce
124	Mr. D.M. Rathnayake	Deputy Director	Department of Commerce
125	Mr. Alexi Gunasekera	Deputy Director	Department of Commerce
126	Ms. Kishani Wickramasinghe	Assistant Director	Department of Commerce
127	Mrs. S. Shamala	Asst. Commissioner of Co-Operative Development	Department of Cooperative Development
128	Mr. M. Sivakumaran	Samurdhi Manager	Department of Divi neguma Development
129	Ms. A.P.P. Disna	Director - Regulation	Department of Export Agriculture
130	Mr. I.V.A.D.C. Induruwa	Assistant Director	Department of Export Agriculture
131	Mr. K.T.N. Nambukara	Head Quarters Extension Officer	Department of Export Agriculture
132	Mr. M C L Fernando	Director General	Department of Fisheries & Aquatic Resources
133	Ms. Sepalika Wickramasinghe	Deputy Director/ Quality Control	Department of Fisheries & Aquatic Resources
134	Mr. L.D.A. Udayakantha	Marine Engineer Assistant	Department of Fisheries and Aquatic Resources (DFAR)
135	Mr. M K W S Kumara	Assistant Director	Department of Fisheries & Aquatic Resources
136	Mr. J. Suthakaran	Assistant Director	Department of Fisheries and Aquatic Resources (DFAR)
137	Mrs. P. Beneraj	District Officer	Department of Industries, Northern Province
138	Ms. Anjalika Gunasekara	Director	Department of National Planning
139	Ms. Chandrika Senanayake	Additional Director	Department of Project Management & Monitoring Ministry of National Policies and Economic Affairs
140	Ms. L.K.S. Dharmakeerthi	Registrar of the Company	Department of Registrar of Companies
141	Mr. H.M.M.U.B. Herath	Provincial Director	Department of Trade, Commerce & Tourism – Central Province
142	Ms. Dilanthi Piyadigama	Research & Development Assistant	Dept. of Export Agriculture, Galle
143	Mr. G. S. Fernando	Managing Director	Dhanusha Marine Lanka Export (Danusha Group of Companies)
144	Mr. Sachitra Fernando	Manager/Business Development	Dhanusha Marine Lanka Export
145	Ms. Gayathri Amarasinghe	Manager Sales & Operation	Dhanusha Marine Lanka Export
146	Mr. Dimithri Perera	Country Manager	DHL Keells (Pvt) Ltd
147	Mrs. M. Ketharagowry	District Coordinator (WDO)	District Child / Women Development Unit
148	Mr. Sirankan	Assistant Director of Planning	District Secretariat, Chudikkuli
149	Mr. C.A. Suneth Lochana	Add.GA	District Secretariat, Hambantota
150	Mr. N Gawrithassan	Assistant Director Planning	District Secretariat, Kilinochchi
151	Mr. K.W. Munasinarachchi	Assistant Director (Planning)	District Secretariat, Matara
152	Mr. T. Thireskumar	Additional District Secretary	District Secretariat, Vavuniya
153	Mr. Gamini Bandara	Proprietor	Dumbara Lanka Spice
154	Mr. Chaminda Lankagama	Market Development Manager	Electro Metal Pressings (Pvt) Ltd
155	Mr. Suresh Ellawala	Director	Ellawala Horticulture (Pvt) Ltd
156	Mr. Asela Jayarathna	Business Development Consultant	EPIC Lanka (Pvt) LTD
157	Mr. Siri J. Samarakkodi	Managing Director	Esjay Electronics (Pvt) Ltd
158	Mr. Srinath Fernando	General Manager	European Chamber of Commerce of Sri Lanka (ECCSL)

No.	Name	Designation	Organization
159	Mr. Dilshan		European Chamber of Commerce of Sri Lanka (ECCSL)
160	Mr. Suntharalingam Anpalagan	Director	Ever Tree Fruit Products (Pvt) Ltd
161	Mr. Theepan	Accountant	Ever Tree Fruit Products (Pvt) Ltd
162	Mr. Harin de Silva	Chairman	Exporters Association of Sri Lanka (EASL)
163	Mr. Sharanyan Sharma	Managing Director	Extreme Seo Internet Solutions
164	Mr. W.T.G. Samantha	Senior Lecturer/Head-DIS	Faculty of Engineer University of Ruhuna
165	Mr. Ajith D Perera	Secretary General	Federation of Chambers of Commerce in Sri Lanka (FCCISL)
166	Dr. Kithsiri Manchanayakke	Chairman	Federation of IT Industry Sri Lanka (FITIS)
167	Mr. A.I. Nagahawatta	Operations Manager	Ferrow Chemicals (Pvt) Ltd
168	Mr. E.R.C. Moraes	Senior Advisor	Finlays Colombo Limited
169	Ms. Deepika Hettiarachchi	Assistant Director - Agriculture Research	Food Research Unit
170	Mr. Nalin Herath		Forever Skin Natural(Pvt)Ltd
171	Mr. Melvin Samarasinghe	Chairman	Foundry Development Services Institute
172	Ms. Priyadarshani Halpe	General Manager	G D P Silva & Sons International (Pvt) Ltd.
173	Mr. Chanaka Kariyawasam	CEO	Galle Chamber of Commerce
174	Mr. Hasitha Wijesundara	Advisor	GIZ - SME Development Programme
175	Mr. Emilio Carcano	Special Project and Stratgic Development	Goglio (Packaging Represent)
176	Mr. S. Muththusamy	Chairman	Green Field Bio Plantation (Pvt) Ltd
177	Mr. Fazal Mushin	CEO	Green Field Bio Plantation (Pvt) Ltd
178	Mr. D. Chandana Thennakoon	Assistant Manager HR & Administration	Greentel Mobile
179	Mr. Ruwan Waidyaratne	Managing Director Chairman	Hayleys Advantis Limited Ceylon Association Of Shipping Agents (CASA)
180	Mr. Samudra Rajapakshe	Head - Strategic Business Development	Hayleys Agriculture Holdings Ltd.
181	Mr. Amal Rodrigo	Director	Hayleys Free Zone
182	Mr. Nalaka Ratnayake	Manager	Hayleys Group
183	Ms. P.A.J. Champika	Reseach Officer	Hector Kobbekaduwa Agrarian Research and Training Institute (HARTI)
184	Mr. Lankesha Ponnampereuma	Manager	Hikka Tranz By Cinnamon
185	Eng. Buddhika Marasingha	Director / Mechanical Engineer	Hitech Solutions (Pvt) Ltd
186	Ms. Nimalka Morahela	Proprietor	HnA Consulting & Events
187	Mr. Renuka Lasantha	Senior Lecturer	ICBT – Kandy
188	Mr. Suboda Perera	Senior Lecturer	ICBT – Kandy
189	Mr. Geeth Jayathilaka	Lecturer	ICBT – Kandy
190	Ms. Yamuna Perera	Director - Exports	Impex Corporation
191	Ms. Renuka Damayanthi	Director - Exports	Impex Corporation
192	Mrs. N. Nimalka Dias	Past Controller General	Import and Export Control Department (IECD)
193	Ms. T.V.D.D.S. Karunarathne	Controller General	Import and Export Control Department (IECD)
194	Ms. Iresha Weerasekara	Controller	Import Export Control Department (IECD)
195	Mr. S.Sivakangatharan	Deputy Director	Industrial Development Board
196	Mr. Priyanka Rathnamalala		Industrial Development Board
197	Mr. Neelakanth Wanninayake	Executive Director & CEO	Industrial Service Bureau
198	Dr. P. Ranasinghe	Senior Deputy Director - Herbal Technology Section	Industrial Technology Institute (ITI)

No.	Name	Designation	Organization
199	Dr. P.N.R.J. Amunugoda	Senior Research Scientist	Industrial Technology Institute (ITI)
200	Dr. H.P.P. Sudaththa Somasiri	Senior Deputy Director	Industrial Technology Institute (ITI)
201	Ms. Manori Wijemanna	Senior Deputy Director/ Marketing & Business Development	Industrial Technology Institute (ITI)
202	Mr. Indika de Zoysa	Director (Projects)	Information and Communication Technology Agency (ICTA)
203	Mr. Sachindra Samararatne	Project Manager	Information and Communication Technology Agency (ICTA)
204	Mr. Nilan Thimbiripola	Project Manager	Information and Communication Technology Agency (ICTA)
205	Dr. Swarna Hapuarachchi	Director	Institute of Indigenous Medicine
206	Dr. A.H. Mohammed Mawjood	Senior Lecturer	Institute of Indigenous Medicine
207	Dr. Janaka Wijayasiri	Research Fellow	Institute of Policy Studies (IPS)
208	Mr. Nanda B. Kohona	Director	International Commodity Traders (Pvt) Ltd
209	Mr. Victor Antonypillai	Country Officer - Sri Lanka and Maldives	International Finance Corporation (IFC)
210	Ms. Lakmini Wijesundera	Chief Executive Officer	IronOne Technologies Pvt Ltd
211	Dr. Dayaratna Silva	National Project Coordinator	ITC
212	Mr. V. Sriharan	AO	Jaffna Chamber Of Commerce
213	Mr. T. Loganathan	Director	Jaffna College Institute of Technology
214	Dr. Dinesh Edirisinghe	Head of Ayurveda	Jetwing Hotel
215	Mr. Ananda de Silva	Business Development Manager	Jetwing Lighthouse
216	Mr. Tuli Cooray	Secretary General	Joint Apparel Association Forum (JAAF)
217	Mr. Sean Van Dort	Director - Logistics & Digital Service Intergration	MAS Capital Joint Apparel Association Forum (JAAF) - Logistics Committee
218	Mr. S. Shnmugalingam	Factory Manager	Juchufy Fruit Based Industry
219	Mr. Lakshan Algama Perera	Director-Finance and Business Development	K.I.K.Lanka (Pvt) Ltd.
220	Mr. Sanka Wijeratne	Director-Finance and Planning	K.I.K.Lanka (Pvt) Ltd.
221	Mr. Sujeewa Godage	General Manager - Capital Development & Sustainability	Kahawatta Plantation PLC
222	Mr. Janaka Gunawardena		Kahawatta Plantation PLC
223	Mr. M.M. Niyaz		Kandy Muslim Traders' Association
224	Mr. Dinesh Wijesiri		Kaneel Cinnamon & Spice Export - Kandy
225	Mr. Balendran	General Manager	Karachchi South MPCs
226	Mr. S. Pirashanth	Production Assistant Manager	Katpagacholai
227	Mr. John Fernando	Assistant Sales Manager - Exports	Kelani Cables PLC
228	Ms. Ishara Jayasinghe	Product Development Executive	Kevilton Electrical Products (Pvt) Ltd
229	Mr. K.L. Karunaratne	Managing Director	L.B. Spices Trading (Pvt) Ltd
230	Mr. W.G. Gunasena	Chairman	Lakrandi Cinnamon Oil
231	Mr. Nilhan Ekanayake	Manager Administration / Export	Lanka Canned (Pvt) Ltd.
232	Mr. Asiri Silva	Manager Export Administration	Lanka Canned (Pvt) Ltd.
233	Mr. Suresh D. De Mel	Managing director Director	Lanka Fishing Flies (Pvt) Ltd Hambantota District Chamber of Commerce
234	Ms. Kemalochana Velauthan		Lanka Fruit & Vegetable Producers, Processors and Exporters Association
235	Mr. Rohan Pallewatta	Managing Director/CEO	Lanka Harness Co. (Pvt) Ltd.
236	Mr. Pubudu Ediriweera	Head of Operations & Compliance	Lanka Harness Co. (Pvt) Ltd.

No.	Name	Designation	Organization
237	Mr. Shayne Madappuli	Business Development Manager	Lanka Hiqu (Pvt.) Ltd T&G lanka (Pvt.) Ltd
238	Ms. Sachithra Pelendahewa	Project Engineer	Lanka Hiqu (Pvt.) Ltd T&G lanka (Pvt.) Ltd
239	Mr. Prithee Perera	Personal Assistant to M.D	Lanka Hiqu (Pvt.) Ltd T&G lanka (Pvt.) Ltd
240	Dr. Prasad Medawatte	CEO	Lanka Hospitals Corporation PLC
241	Ms. Tehania Samarasekara	Manager- International Patient Care Services	Lanka Hospitals Corporation PLC
242	Mr. D.K.R. Dharmapala	CEO	Lanka Sportreizen
243	Mr. Jagath Kumara	Senior Surveyor and In charge of Sri Lanka Operations	Lloyd's Register Marine
244	Mr. E.W.A.S. Erathna	Exports and Compliance Officer	Maliban Biscuit Manufactories (Pvt) Ltd
245	Mr. Christopher Fernando	Executive Director	Malwatte Valley Plantation PLC
246	Mr. Duminda Meddogoda		Mas Holdings (Pvt) Ltd
247	Mr. R.G.S.A. Perera	Deputy Director	Measurement Units, Standards and Services Department (MUSSD)
248	Mr. S.D.I. Dias	Assistant Director	Measurement Units, Standards and Services Department (MUSSD)
249	Mr. Alanka Ruwanpathirana	Assistant Director	Measurement Units, Standards and Services Department (MUSSD)
250	Mr. Chamindika Jude Samaraweera	Managing Director	Medical Tourism (Pvt) Ltd
251	Ms. N. Jayasinghe	Legal Officer	Merchant Shipping Secretariate
252	Mr. P V T P Chandana	Gov. Ship Surveyor	Merchant Shipping Secretariate
253	Capt. Upul Peiris	Government Ship Surveyor	Merchant Shipping Secretariate
254	Mr. Jeewana Waidyarathne	General Manager	Metatechno Lanka Company (Pvt) Ltd
255	Mr. Pubudu Basnayake	OEM Director - New Market for South East Asia	Microsoft
256	Mr. S T Abouthali	AD/FCAU	Ministry of Health, Nutrition and Indigenous Medicine
257	Mr. B.Wijayarathna	Secretary	Ministry of Agriculture
258	Mr. K. Hettiarachchi	Add. Secretary	Ministry of Agriculture
259	Mr. T.H. Amarasinghe	Director- Agriculture Technology	Ministry of Agriculture
260	Mr. E.H.G. Prasanga	Asst.Secretary	Ministry of Agriculture & Trade (SP)
261	Mr. M. Bakerathan	Development Officer	Ministry of Agriculture, Northern province
262	Mr. W.A.D.S. Gunasinghe	Additional Secretary	Ministry of Development Strategies & International Trade (MODSIT)
263	Dr. Ravi Ratnayake	Member- National Trade Negotiation Committee	Ministry of Development Strategies and International Trade (MODSIT)
264	Ms. Gamani Liyanarachchi	Director	Ministry of Development Strategies & International Trade (MODSIT)
265	Ms. Amila Nawaratne	Assistant Director	Ministry of Development Strategies & International Trade (MODSIT)
266	Mr. Ryan Jehan Rockwood	Representative	Ministry of Development Strategies & International Trade (MODSIT)
267	Mr. Deyanath Kulatunga		Ministry of Development Strategies & International Trade (MODSIT)
268	Ms. Krishani K. Koralege		Ministry of Education
269	Mr. Jagath Murage	Director	Department of Trade Investment Policy - Ministry of Finance
270	Mrs.U.P.I.G.Uggaldeniya	Assistant Director(Planning)	Ministry of Fisheries & Aquatic Recourses Development

No.	Name	Designation	Organization
271	Ms. Prasadini Bominiyaarachchi	Asst.Secretary	Ministry of Fisheries & Aquatic Recourses Development (SP)
272	Mr. Kapila Fonseka	Director	Ministry of Foreign Affairs Economic Affairs & Trade
273	Ms. Subhashini Silva	Assistant Director	Ministry of Foreign Affairs
274	Mr. U. Ahamed Razee	Assistant Director	Ministry of Foreign Affairs
275	Dr. Ananda Jayalal	Director Food Control Unit	Ministry of Health, Nutrition & Indegenous Medicine
276	Dr. T. Weeraratna	D/D Technical	Ministry of Health, Nutrition and Indigenous Medicine.
277	Dr. K. Ariyaratne	Director-Private Health sector Development	Ministry of Health, Nutrition and Indigenous Medicine.
278	Dr. E. Rajapakshe		Ministry of Health, Nutrition and Indigenous Medicine.
279	Mr. D.D. Mathararachchi	Senior Programme Director	Ministry of Higher Education and Highways
280	Ms. Mangala Gunarathne	Director	Ministry of Higher Education and Highways
281	Ms. R . Thilageshwary	Asst Secretary	Ministry of Industries - Central Province
282	Mr. Rohan Jayatilaka	Director	Ministry of Industry & Commerce
283	Mr. R.S.K. Doolwalage	Director (Commerce)	Ministry of Industry & Commerce
284	Mr. Anil Sirimanne	Assistant Director	Ministry of Industry & Commerce
285	Mr. H.M.S. Kumara		Ministry of Industries - Central Province
286	Rear Admiral. D E C Jayakody	Project Director - Maritime Cities Development Project	Ministry of Mega polis & Western Development
287	Mr. U G Ratnasiri	Additional Secretary - Economic Affairs	Ministry of National Policies & Economic Affairs
288	Mr. Dhammika Ranatunga	Director - Development	Ministry of Plantation Industries
289	Mr. N.S. Wanasinghe	Director	Ministry of Plantation Industries
290	Ms. H.R. Sirinama	Director	Ministry of Ports and Shipping
291	Mrs. B.M.R.P. Bandaranayake	Assistant Director Planning	Ministry of Ports and Shipping
292	Dr. Kumudini Gunasekara	Agri Business Specialist	Ministry of Primary Industries
293	Mr. Ransilu Watawala	Deputy Director	Ministry of Primary Industries
294	Mr. Sapumal Kapukotuwa	Value Chain Specialist	Ministry of Primary industries ASMP -World Bank
295	Mr. Waruna Dhanapala	Senior Assistant Secretary (ICT for Dev)	Ministry of Telecommunication & Digital Infrastructure
296	Mrs. Uma Nirajanan	Director (Planning)	Ministry of Tourism Development & Christian Religious Affairs
297	Mr. J.M. Thilakarathna Banda	Additional Secretary	Ministry of Transport and Civil Aviation
298	Mr. Sanjeeva Abeygoonewardena	Director/CEO Group Managemnet Committee	Mountain Hawk Express (Pvt) Ltd (FedEx Express) Hayleys Advantis Ltd.
299	Dr. (Mrs) Diana Gunawardena	Chairperson	Mystical Rose Health & Leisure Care (Pvt) Ltd
300	Mr. Dinesh Gunawardena	Director	Mystical Rose Health & Leisure Care (Pvt) Ltd
301	Mr. R.Thirumurugan	Inspection Officer	National Apprentice and Industrial Training Authority (NAITA)
302	Mr. H.M.U.K.PB. Herath	Director (Freshwater Aquaculture Development)	National Aquaculture Development Authority (NAQDA)
303	Mr. Ramal Jasinghe	President	National Chamber of Exporters
304	Mr. Shiham Marikkar	Secretary General/CEO	National Chamber of Exporters
305	Mr. L.S.G. Thilakaratne	Consultant	National Chamber of Exporters of Sri Lanka(NCE)
306	Ms. Linda Motha	Senior Executive -Technical Service	National Chamber of Exporters
307	Mr. Sachithra Weerasinghe	Manager	National Chamber of Exporters
308	Ms. Keshani Witanage		National Chamber of Exporters
309	Mr. G.G. Jayasinghe	Deputy Director (R)	National Cinnamon Research & Training Centre

No.	Name	Designation	Organization
310	Mr. Lakshman Wijewardena	Director	National Economic and Development Authority (NEDA)
311	Mrs. D.G. Ayoma .P. Dias	Assistant Director - Export Services and Export Marketing	National Gem & Jewellery Authority
312	Mrs. I.K. Warshamana	Deputy Director	National Plant Quarantine Service
313	Ms. W.Jayani Nimanthika	Assistant Director	National Plant Quarantine Service
314	Mr. J. G. Shantha Siri	Senior Scientific Officer	National Science Foundation
315	Mrs.Vijitha Weerasinghe	Director/ Planning	National Transport Commission
316	Ms. Supuli Sililari	Managing Director	Nature Healing Ayurveda Products
317	Mr. Kapila Sumanapala	Director Administration	Neil Fernando and Company (Pvt) Ltd
318	Mrs. Dawn. S. Austin	Managing Director	Nidro Supply (Pvt) Ltd.
319	Mr. T. Thavaruban	Chairman	Northern Chamber of Information Technology
320	Mr. Y. Sharmmhik	Vice Chairman	Northern Chamber of Information Technology
321	Mr. Jagath Chammika	Managing Director	NorthWest Marine (PVT) LTD
322	Mr. I D D Wickramasinghe	Finance Manager	NorthWest Marine (PVT) LTD
323	Mr. S. Naguleswaran	Owner of the Company	Nutri Food Packers
324	Ms. Shanali Samarasekara	Assistant Director	Ocean University /Regional Centre, Galle
325	Mr. P.U.I. Perera	Director (Training)	Ocean University of Sri Lanka
326	Mr. A. Jesudas	S.D.A	Ocean University,Jaffna
327	Mr. Fazil Nayeem	General Manager - Operations	Oceanpick (Pvt) Ltd
328	Mr. Irfan Thassim	Managing Director	Oceanpick (Pvt) Ltd
329	Mrs. S. Kaileswaran	District Director	Office of the District Director of Agriculture
330	Mr. Kushan Kodituwakku	Managing Director	OREL Corporation (Pvt) Limited
331	Mr. Dashan Rathnasinghe	R&D Engineer Electronics	OREL Corporation (Pvt) Limited
332	Mr. Duminda Perera	R&D Junior Project Manager	OREL Corporation (Pvt) Limited
333	Mr. Indika Kulatunga	General Manager Innovation	OREL Corporation (Pvt) Limited
334	Mr. Anuradha Abeyweera	R&D Manager	OREL Corporation (Pvt) Limited
335	Mr. Upendra Pieris	Vice President	OrelIT (Pvt) Limited
336	Mr. Jeevan Gnanam	Director / CEO	Orion City IT Park
337	Mr.Siddharthan Udhayakumaran	Executive Assistant to CEO	Orion City IT Park
338	Mr. Chaminda Udakumbura	Deputy General Manager - Administration	Paddy Marketing Board
339	Mr. M.B. Loganathan	Deputy General Manager	Palmyrah Development Board
340	Mr. Sanjay Tiwari	CEO & Executive Director	Piramal Glass Ceylon PLC
341	Mr. Nishan Mendis	Director - Consulting	PricewaterhouseCoopers (PWC)
342	Ms. Zahra Cader	Senior Manager	PricewaterhouseCoopers (PWC)
343	Mr. Sajith Gunaratna	Deputy General Manager	Prima Group / Ceylon Agro Industries Ltd
344	Dr. Nandaka Molagoda	Director	Prime Minister's Policy Development Office
345	Mr. Jaliya Wickramasurendra	Director	PTC Holdings
346	Ms. Sankeetha		Punkudutivu Food Manufactures
347	Ms.Thamilini		Punkudutivu Food Manufactures
348	Ms. Elavally		Punkudutivu Food Manufactures
349	Mr. Jeevantha Fernando	Director	Ranil Marine
350	Mr. Tyrone Mendis		Ranil Marine
351	Mr. M.W.Tiron Premajith	Export Manager	Rathna Producers Cinnamon Exports (Pvt) Ltd
352	Mr. Canagaratnam Sabeson	Head of Key Accounts	Renuka Agri Foods PLC
353	Dr. S.R. Rajiyah	Group Managing Director	Renuka Agri Foods PLC

No.	Name	Designation	Organization
354	Mr. Withanawasam		Rice Research & Development Institute
355	Mrs. Amitha Bentota	Director-Rice Research and Development	Rice Research and Development Institute
356	Mr. J.M. Ikram		Rio Jewellery - Kandy
357	Dr. Susantha Siriwardena	Deputy Director	Rubber Research Board [RRI]
358	Mr. H.M.P. Bandara		Ruhunu Foods (Pvt) Ltd
359	Mr. D.A.H. Dharmapala	Promotion Manager	Ruhunu Tourism Bureau
360	Mr.J.M. Karunaratna	Manager	Ruweena Products
361	Mr. Suresh A. Silva	Managing Director/ Group Chief Executive	S A Silva & Sons Lanka (Pvt.) Ltd.
362	Mr. Prabath Fernando	Assistant General Manager- Finance	S A Silva & Sons Lanka (Pvt.) Ltd.
363	Ms. Pubudini Abeysekera-Anthonypillai	Executive Coordinator	S.A. Knowledge Services (Pvt) Ltd (SAKS) Website Directions Orion City
364	Prof. Achini De Silva	Lecturer	Faculty of Agricultural Sciences - Sabaragamuwa University of Sri Lanka
365	Mr. M. Nilashan	Director	Satron
366	Mr. A.G. Indrajith	Accountant	SDS Spices (Pvt) Ltd
367	Mr.Charitha Dewinuwan Perera		Septra Natural (Pvt) Ltd
368	Ms. Ruvini Ranasinghe	Manager-Business Development	SGS Lanka (Pvt) Ltd.
369	Mr. Ushan Edirisinghe	Senior Marketing Manager-Leisure	Siddhalepa Ayurveda Resorts & Spas
370	Mr. Harshana Rajaratne		Siddhalepa Groups (pvt) Ltd
371	Mr. Palitha Ethulgama	Deputy General Manager - Marketing	Sierra Cables PLC
372	Mr. Haridhu Abeygoonaratne	General Manager	Sim Centric Technologies (Pvt) Ltd.
373	Ms. B. Ameera	Accountant	Sivanarul Products
374	Ms. S.Anitha	Accountant	Sivanarul Products
375	Mr. Ruwindu Peiris	Chairman	SLASSCOM
376	Mr. Chrishan De Mel	Executive Director	SLASSCOM
377	Ms. Menushika Fernandopulle	Programme Manager - Tentative	SLASSCOM
378	Mr. Channa Manoharan	Director Operations Advisory Leader	SLASSCOM PWC
379	Mr. S.D. Premathilake	General Manager	Solas Marine Lanka (Pvt) Ltd.
380	Mr. Shehan Ramanayake	Consultant (Tourism)	Southern Development Board
381	Mr. Vernon Abeyratne	Chairman	Spices & Allied Products Producers' and Traders' Association (SAPTA)
382	Mr. D. G. Pushpakumara	Deputy Director (Finance & Administration)	Sri Lanka Accreditation Board (SLAB)
383	Mr. L.H.D. Bandusoma	Deputy Director	Sri Lanka Accreditation Board (SLAB)
384	Ms. Chanditha Ediriweera	Deputy Director	Sri Lanka Accreditation Board (SLAB)
385	Mr. Manisha H. Wickramasinghe	Assistant Director (Accreditation)	Sri Lanka Accreditation Board for Conformity Assessment (SLAB)
386	Mr. Janaka Munasinghe	Senior Manager – Worldwide Cargo Operations	Sri Lanka Airlines Limited
387	Mr. Felix Fernando	Chairman	Sri Lanka Apparel Exporters Association
388	Mr. Kumar Senevirathna	Reoresentative Manager Logistics	Sri Lanka Apparel Exporters Association Penguin Sportswear (Pvt) Ltd(Emjay Penguin)
389	Mr. Nimal S. Perera	President	Sri Lanka Association for the Advancement of Quality and Productivity (SLAAQP)

No.	Name	Designation	Organization
390	Mr. Niroshan Periyasamy	Deputy Secretary	Sri Lanka Automotive Component Manufacturers Association (SLACMA)
391	Mr. Prema Cooray	Chairman	Sri Lanka Convention Bureau
392	Mr. S. Mahesan	Director (Exports)	Sri Lanka Customs
393	Mr. Sudaththa Silva	Superintendent Customs	Sri Lanka Customs / ASYCUDA World and Border Alerts Management Team
394	Mr. K A K N D Dharmapala	Assistant Superintendent of Customs	Sri Lanka Customs
395	Mr. Palitha Gurusinghe	President	Sri Lanka Ecotourism Foundation
396	Mr. Dilruk Ransinghe	General Manager	Sri Lanka Export Credit Insurance Corporation (SLECIC)
397	Mr. Maliek de Alwis	President	Sri Lanka Food Processors Association (SLFPA)
398	Mr. Delano Dias	Vice President Chief Operating Officer	Sri Lanka Food Processors Association (SLFPA) Cargills Quality Foods Ltd.
399	Mr. Dhammika Gunasekara	Past President Hon Secretary	Sri Lanka Food Processors Association (SLFPA) The Spice Council
400	Mr. Dushmantha Karannagoda	Past Chairman	Sri Lanka Freight Forwarders' Association (SLFFA)
401	Dr. Pradeepa Samarasinghe	Head OF Department Department of IT	Sri Lanka Institute of Information Technology (SLIIT)
402	Dr. Pradeep Abeyguunawardane	Senior Lecturer Head - Department of Information Systems Engineering	Sri Lanka Institute of Information Technology (SLIIT)
403	Mr. Suranjith Swaris	Vice President, Events	Sri Lanka Institute of Marketing
404	Mr. Pradeep Edward	Vice President, Education	Sri Lanka Institute of Marketing
405	Mr. Dehan Seneviratne	Manager/Marketing consultant	Sri Lanka Institute of Marketing
406	Dr. Shehan De Silva	Head of Strategic Planning/ Senior Scientist	Sri Lanka Institute of Nanotechnology (SLINTEC)
407	Mr. Anura Alahapperuma	Head /Tourism Event Mgt.	Sri Lanka Institute of Tourism & Hotel Management
408	Mr. Sarath Kumara	Senior Lecturer	Sri Lanka Institute of Tourism & Hotel Management
409	Mr. Jagath Pathirane	Chairman	Sri Lanka Logistics and Freight Forwarders Association (SLFFA)
410	Mr. Roshan Silva	Vice Chairman Managing Director	Sri Lanka Logistic and Freight Forwarders Association (SLFFA) CL Synergy Pvt.Ltd
411	Commodore. D.S. Bogahawaththa	Commodore Manager IP CP	Sri Lanka Navy
412	Mr. H. D. A. S. Premachandra	Managing Director	Sri Lanka Ports Authority
413	Mr. Upali De Zoysa	Director – Logistics	Sri Lanka Ports Authority
414	Mr. Jayantha Perera	Director- Ports Operation	Sri Lanka Ports Authority
415	Mr. Suranga Walpola	Manager (Logistic)	Sri Lanka Ports Authority
416	Ms. Zavia Miskin	Dy. Chief Operations Manager	Sri Lanka Ports Authority
417	Mr. A.L. Mohammed Nowfer	Dy.Chief Engineer	Sri Lanka Ports Authority
418	Mr. Nirmal Silva		Sri Lanka Ports Authority
419	Mr. D.H.S.Wimalasiri	DHM/Act.RM	Sri Lanka Ports Authority - Galle
420	Mr. N.J. Chrisso De Mel	Chairman	Sri Lanka Shipper's Council
421	Mr. Suren Abeysekera	Vice Chairman	Sri Lanka Shipper's Council
422	Mr. Gamini Dharmawardena	Director General	Sri Lanka Standard Institution (SLSI)
423	Mr L P L Chitrage	Director (Laboratory Services)	Sri Lanka Standard Institution (SLSI)
424	Mr. M.S.S. Fernando	Director (Eng)	Sri Lanka Standard Institution (SLSI)
425	Mrs. Samanthi Narangoda	Director	Sri Lanka Standard Institution (SLSI)
426	Mrs. M.I.S. Jayasekera	Director (Standardization)	Sri Lanka Standard Institution (SLSI)
427	Mr. T. Uthayakumar	Senior Deputy Director	Sri Lanka Standard Institution (SLSI)

No.	Name	Designation	Organization
428	Mr. L.W. Gunawardana	Senior Deputy Director	Sri Lanka Standard Institution (SLSI)
429	Mr. M.K. Samaraweera	Asst.Tea Commissioner	Sri Lanka Tea Board
430	Mrs. Premala Srikantha	Director Promotions	Sri Lanka Tea Board
431	Dr. K. Ranjith W. Abeywickrama	Deputy Director (Laboratory) President	Sri Lanka Tea Board Sri Lanka Association of Testing Laboratory
432	Mr. M.C. Sampath Perera	Assistant Director	Sri Lanka Tea Board
433	Mr. Nalaka Sanjeewa	Market Analyst	Sri Lanka Tea Board
434	Mr. Chandana Wijeratna	Director-Standard & Quality Assurance	Sri Lanka Tourism Development Authority (SLTDA)
435	Ms. Rajeeka Ranathunga	Assistant Director - International Relations	Sri Lanka Tourism Development Authority (SLTDA)
436	Mr. Waruna Ettipola	Assistant Director - Standards & Quality Assurance	Sri Lanka Tourism Development Authority (SLTDA)
437	Mr. Dayasiri Fernando	Assistant Director	Sri Lanka Tourism Development Authority (SLTDA)
438	Ms. Dinushka Peiris		Sri Lanka Tourism Development Authority (SLTDA)
439	Mr. Indrajith de Silva	Director - Destination and Social Responsibility	Sri Lanka Tourism Promotion Bureau
440	Mrs. Madubhani Perera	Director Marketing	Sri Lanka Tourism Promotion Bureau
441	Mr. Tyrone Gunawardane	Manager - Cargo	Sri Lankan Airlines Limited
442	Mr. Clifford Rodrigo	Cargo Sales Manager	Sri Lankan Airlines Limited
443	Mr. Hiran Fernando	Cargo Sales Executive	Sri Lankan Airlines Limited
444	Mr. Chinthaka Kulatilleke	Head of HR & Administration	Sri Lankan Catering
445	Mr. S.Lucia Selvakumar		St.Lucia(Pvt) Ltd
446	Mr. T. Niroshan		Sun Coir Industry
447	Mr. Farazy Fahmy	Director - Research and Development	Synopsys Lanka (Pvt) Ltd
448	Mr. Ashique Mohamed Ali	Director	Talliance (Pvt) Ltd
449	Mr. Ranjith Abeykoon	Secretary General	Tea Exporters' Association
450	Mr. M C M Farook	Deputy Director	Telecommunications Regulatory Commission of Sri Lanka
451	Mr. T.G. Premaratne	Development Officer	Telecommunications Regulatory Commission of Sri Lanka
452	Mr. Rohan Abeywickrama	President	The Association of Small and Medium Enterprises in Tourism (ASMET)
453	Mr. M.B. Jayarathne	Vice President	The Association of Small and Medium Enterprises in Tourism (ASMET)
454	Dr. I.B.V.L. Dharmawadhana	Animal Quarantine Officer	The Department of Animal Production and Health (DAPH)
455	Ms. Laleenie P. Hulangamuwa	Chief Executive Officer	The Hotels Association of Sri Lanka
456	Mr. Sanath Ukwatte	President Chairman/MD	The Hotels Association of Sri Lanka Mount Lavinia Hotel
457	Mr. D.A. Perera	Chairman Managing Director	The Spice Council EOAS Organics (Pvt) Ltd
458	Mr. Jude Fernando	Secretary	The Spice Council
459	Mr.T P L Raj	Treasurer	The Spice Council
460	Mr. Merrick Gooneratne	Executive Director	TOS Lanka Co. (Pvt) Ltd.
461	Mr. D. Fernando	ICT Manager	TOS Lanka Co. (Pvt) Ltd.
462	Ms. Janitha Danthanarayana	Operation Manager	TOS Lanka Co. (Pvt) Ltd.
463	Mr. M. Thanthirimudali		Tour Guide Association
464	Ms. Rashmi Mather		Tourism Task Force
465	Mr. Chandana Hettiarachchi	Secretary	Tourist Drivers Association - Kandy

No.	Name	Designation	Organization
466	Mr. C. Perera	Duty Secretary	Tourist Drivers Association - Kandy
467	Mr. Wilhelm E. Brown	President General Manager	Travel Agents Association of Sri Lanka (TAASL) Alpha Travels & Holidays (Pvt) Ltd
468	Mr. Shibly Shamsudeen	Director Operations	Traveller Global (Pvt) Ltd
469	Mr. A.S. Thenuwara	Managing Director	Tree of Life (Pvt) Ltd
470	Mr. P.Vimalakrishna	BDFO	UNDP
471	Mr. M.Z.M. Farhad	National Sector Specialist	UNIDO EU/ITC/UNIDO Project Sri Lanka
472	Ms. Sumathy. L. Rajasingham	National Quality Expert	UNIDO
473	Dr. Nishantha Sampath Punchihewa	Senior Lecturer & Attorney at Law	University of Colombo
474	Dr. Ruwan Weerasinghe	DGM Business Development	University of Colombo School of Computing
475	Dr. A. Ramanan	Head Of the Department(IT)	University of Jaffna
476	Prof. Velampy	Dean/Faculty of Managemant	University of Jaffna
477	Mr. Ravi Dissanayake	Senior Lecturer	University of Kelaniya
478	Dr. Janaka Wijayanayake	Senior Lecturer - Department of Industrial Management Faculty of Science	University of Kelaniya
479	Dr. Dilani Wickramaarachchi	Senior Lecturer - Department of Industrial Management Faculty of Science	University of Kelaniya
480	Mr. Bhanu Watawana		University of Kelaniya - Faculty of Science
481	Dr. Ajith Pasqual	Head/Dept. of Electronics & Telecommunication Engineering	University of Moratuwa
482	Dr. Lochandaka Ranathunga	Senior Lecturer - Department of Information Technology	University of Moratuwa
483	Eng. Nishal Samarasekara	Senior Lecturer - Department of Transport & Logistics Management	University of Moratuwa
484	Dr. (Mrs) Eresha Mendis	Senior Lecturer - Department of Food Science & Technology	University of Peradeniya
485	Dr. Udayanga Galappaththi	Senior Lecturer	University of Ruhuna
486	Dr. D.H.N. Munasinghe	Professor	University of Ruhuna
487	Mr. Chandana Dissanayake	Managing Director President	Variosystems (Pvt) Ltd Sri Lanka Electronic Manufacturers and Exporters Association
488	Mr. K Uthayakumar	Secretary	Vavuniya District Chamber of Commerce, industry and Agriculture
489	Ms. Subhashini Abeysinghe	Head of Economics	Verite Research
490	Ms. Hasna Munas	Research Analyst	Verite Research
491	Mr. N.C. Illangarathne	Managing Director	Virco International (Pvt) Ltd
492	Mr. Madu Ratnayake	Executive Vice President	VirtusaPolaris
493	Mr. E. Vijithan	Asst. Director	Vocational Training Authority of Sri Lanka
494	Dr. Sarath Obeysekara	Executive Vice President/Chief Executive Officer	Walkers Colombo Shipyard (Pvt) Ltd
495	Mr. Nimal Gunawardane	General Manager	Walkers Colombo Shipyard (Pvt) Ltd
496	Dr. Lalith Samarakkody		
497	Mr. Chamila Silva	Sales & Marketing Engineer	Walkers Colombo Shipyard (Pvt) Ltd
498	Ms. Rifa Musthapha	Past Chairperson	Women's Chamber of Industry and Commerce, Sri Lanka (WCIC)
499	Ms. Chathuri P Ranasinghe	Chairperson	Women's Chamber of Industry and Commerce, Sri Lanka (WCIC)
500	Ms. Eugena Jerome	Board Member	Women's Chamber of Industry and Commerce, Sri Lanka (WCIC)

No.	Name	Designation	Organization
501	Dr. Vinod K. Goel	Senior Consultant	World Bank Group
502	Ms. Katarina	Consultant	World Bank Group
503	Mr. Kavitha Ariyabandu	Analysist	World Bank Group
504	Mr. Vidura Gamini Abhaya	Director of engineering	WSO2
505	Mr. Tharmarajah Suresh	Chairman/ Group CEO	Zillione Holdings Pvt Ltd.
506	Capt. A Banerjee	Managing Director	ZIM
507	Mr. A. Kayansan		
508	Ms. Indira Malwatte	Chairperson & Chief Executive	Export Development Board
509	Ms. Jeevani Siriwardena	Director General	Export Development Board
510	Ms. P.K. Sumitrarachchi	Addl. Director General - Finance & Administration	Export Development Board
511	Mr. Dammika Jayawardane	Addl. Director General - Development	Export Development Board
512	Ms. Chitrangali Dissanayaka	Director	Industrial Products Division
513	Mr. M.K.S.K. Maldeni	Director	Export Service Division
514	Ms. Dayani Wegapitiya	Director	Policy & Strategic Planning Division
515	Ms. Malani Baddegamage	Director	Export Agriculture Division
516	Ms. Anoma Premathilaka	Director	Market Development Division
517	Ms. Indu Alahapperuma	Director	Information Technology Division
518	Mr. S.R.P. Indrakeerthi	Director	Trade Facilitation & Trade Information
519	Mr. K.K. Ruwan Kannangara	Director	Human Resources Management
520	Mr. K.H.R.P. Fernando	Actg. Director	Regional Development
521	Ms. Devi Thakshila Wijayarathne	Legal Officer	Legal Unit
522	Ms. Anoma Karalliyadde	Deputy Director	Central Province Regional Office
523	Ms. N. S. Narandeniya	Deputy Director	Export Agriculture Division
524	Ms. S.A.G. Anuradha	Deputy Director	Export Agriculture Division
525	Mr. C. Amerasinghe	Deputy Director	Export Services Division
526	Ms. Sepali Jayawardena	Deputy Director	Industrial Products Division
527	Mr. Harsha Pathberiya	Deputy Director	Industrial Products Division
528	Mr. Saman Sisil	Deputy Director	Information Technology Division
529	Mr. Prasanna Jayasinghe	Deputy Director	Market Development Division
530	Ms. Manoja Dissanayake	Deputy Director	Market Development Division
531	Ms. Achini Weerawardhane	Deputy Director	Policy & Strategic Planning Division
532	Ms. Kumudinie Mudalige	Deputy Director	Regional Development Division
533	Mr. Anura Wickramasekara	Deputy Director	Southern Province Regional Office
534	Ms. Chandani Ratnayake	Deputy Director	Trade Facilitation & Trade Information Division
535	Ms. Gayani Wijayathilake	Assistant Director	Export Agriculture Division
536	Ms. Inoka Nilmini Wanasinghe	Assistant Director	Export Agriculture Division
537	Ms. Thilini Upadya Wimalagunasekera	Assistant Director	Export Agriculture Division
538	Mr. Akila de Zoysa	Assistant Director	Export Services Division
539	Ms. Vajira Kularathna	Assistant Director	Export Services Division
540	Ms. K. Irugalbandara	Assistant Director	Trade Facilitation & Trade Information Division
541	Ms. Chathurangi D.S. Nuwarapaksha	Assistant Director	North Western Province Regional Office
542	Mr. Sanjeewa Rathnasekara	Assistant Director	Policy & Strategic Planning Division
543	Ms. S. N. Tharangani	Assistant Director	Policy & Strategic Planning Division
544	Ms. Rukshanie Vidyaratne	Assistant Director	Policy & Strategic Planning Division
545	Ms. Dhanushka Ruwanpathirana	Export Promotion Officer	Export Services Division

No.	Name	Designation	Organization
546	Ms. Nipuni Munasinghe	Export Promotion Officer	Export Agriculture Division
547	Mr. Yohan Silva	Export Promotion Officer	Export Agriculture Division
548	Ms. Anuradha Rajapaksha	Export Promotion Officer	Export Agriculture Division
549	Mr. Dinesh Attanayake	Export Promotion Officer	Export Services Division
550	Ms. Fathima Muneera	Export Promotion Officer	Monitoring Unit
551	Ms. W.M. D. U. Bandara	Export Promotion Officer	National Organic Control Unit
552	Ms. Iresha Chuturanganie	Export Promotion Officer	Policy & Strategic Planning Division
553	Ms. Shavindya Sumanasekara	Export Promotion Officer	Policy & Strategic Planning Division
554	Ms. Nilani Rathnayake	Development Officer	Export Services Division
555	Ms. Mangala Madhuwanthi	Development Officer	Industrial Products Division
556	Mr. Rashaad	Officer In Charge	Jaffna Regional Office



Photo: ITC

APPENDIX 2: 2018 NATIONAL BUDGET ACTIVITIES CONTRIBUTING TO THE NES

Items from 2018 National Budget contributing to NES implementation	Applicable to NES, Sector or TSF	Lead implementing agency	Indicative value (Rs.)
49. To strengthen the eco-certification programme to facilitate access to export markets.	Spices and P F&B	Department of Agriculture	25 Mn
53. ...upgrade the Department of Meteorology with the state of the art technology and elevate the capacity of the personnel.	NQI	Department of Meteorology (MUSSD)	200 Mn.
55. We will also exempt NBT on the import of selected equipment including greenhouse technology that enables advanced technology agriculture practices.	Spices		
56. Backward integrated activities related to agriculture will be taxed at the concessional Income Tax rate of 14%.	Spices and P F&B		
74. Establishment of a Development Bank with an EXIM window, to enable the much desired long term financing for our private sector ventures. Until the Bank is established, we will continue with the targeted, existing and the proposed loan schemes. (See: <i>Development Bank Act</i>)	NES	Ministry of National Policies and Economic Affairs	10,000 Mn
80. We will also establish a SME Guarantee Fund which will further augment the SMEs' capacity to borrow given that it will be considered as collateral. 84. The SME Guarantee Fund will be extended to the "IT Initiative" and the exporters who require support, as well. 92. The proposed SME Guarantee Fund will enable SME Exporters who are in the CRIB but have the potential to export, yet has no access to finance its operations, to access financing from Banks utilizing the SME guarantees.	IT-BPM All NES sectors	-Do-	500 Mn
81. "Erumbuma Credit Scheme" which supports the startups with a credit facility of Rs. 1.5 million per annum per idea per person with a Government Guarantee. The "Erumbuma" Credit Scheme	All NES sectors	EDB	25 Mn
82. Will launch, the "IT Initiative", which is in effect the Government's angel fund for the IT industry. This initiative will be operated through the EDB and we will invest Rs. 3 billion in the next 5 years to support: <ul style="list-style-type: none"> The local startups and to attract foreign startups, Small and Medium sized IT Companies, and Create the enabling environment by supporting establishment of Incubators, supporting the acquisition and augmentation of skills and knowhow in collaboration with the local universities etc. 83. The "IT Initiative" will at the outset finance the following: <ul style="list-style-type: none"> 50% of the Rent expenditure for 24 months on the Hatch Incubator and similar support to any such private ventures in the future, as well. The Universities of Colombo and Moratuwa and, SLIIT will conduct training courses on Artificial Intelligence, Robotics, Data Science, Machine Learning, Python Development etc. in collaboration with the industry. Employment for those who successfully follow such courses will be guaranteed by the private sector. The cost of these courses will be shared between the industry and the proposed "IT Initiative". 	IT-BPM	EDB	300 Mn
85. The para-tariffs applicable on the tariff lines which do not at present carry any Customs duties will be abolished within the next 3 years, in keeping with our policy of liberalizing and globalizing.	NES	Ministry of Finance & Mass Media	

Items from 2018 National Budget contributing to NES implementation	Applicable to NES, Sector or TSF	Lead implementing agency	Indicative value (Rs.)
<p>88. We will introduce an "Export Market Access Support Programme" targeting the extension of support to:</p> <ul style="list-style-type: none"> • local companies that already have exports of less than USD 10 million per annum. • potential new entrants to the export market to better access the global value chains. • meeting of the cost of compliance which includes the cost of provision of free samples, intellectual property registration, insurance and promotional costs undertaken overseas. • meeting of the full or partial cost of rent of retail shop space or shelf space occupied by domestic brands that reach overseas markets for a maximum period of 36 months. • Product development assistance to exporters to develop new products or improve existing products to meet the export market standards and financial support will be provided through the "Enterprise Sri Lanka" Credit schemes. 	All NES sectors	EDB	800 Mn
<p>93. National Quality Infrastructure, the testing facilities at the Industrial Technology Institute (ITI), Sri Lanka Standards Institution (SLSI), National Quarantine Center, National Aquatic Research Agency and similar agencies will be upgraded to be on par with international certification bodies. This will facilitate our products to be acceptable in the global markets and to facilitate the proposed import inspection and facilitation scheme.</p>	NQI	ITI/SLSI/NARA/NQC	250 Mn
<p>94. The National Intellectual Property Office will also be upgraded and better resourced.</p>	NES, Spices	-Do-	25 Mn
<p>95. In order to meet the growing demand and to facilitate Business to Consumer e-commerce transactions (B to C), the BoI and the Customs Department will establish a procedure by 1st January 2018, to effect such transactions.</p>	NES Logistics	BoI DoC	
<p>96. Logistics hub: which includes front end services, Multi Country Consolidation, Warehouses, Entrepot Trading and Off Shore Businesses which have immense potential. However, if we are to exploit this potential in full, certain amendments to regulations will have to be effected. <i>Such amendments will consist of the liberalization of the existing investment regime with the inclusion of working capital, expansion of designated areas and introduction of updated operating guidelines.</i></p> <p>97.</p> <ul style="list-style-type: none"> • Sri Lanka Ports Authority Act, No. 51 of 1979 and the Merchants Shipping Act, No. 52 of 1971 will be amended to cater to the demands of the modern day logistics and marine industry. • An independent Ports regulator will be introduced. • Restrictions on the foreign ownership on the shipping and the freight forwarding agencies will be lifted. This will enable major international shipping lines and logistics operators to base their operations in Sri Lanka. 	Logistics NES	SLPA, BoI, Customs	
<p>98. The Government will drive a comprehensive "Multi-National Corporation Outreach" programme (MNC Outreach) to attract global Electronic and Electrical Machinery (EEM) players into the country to create value chain linkages or joint ventures with Sri Lankan EEM exporters.</p>	EEC	EDB	25 Mn
<p>100. The EDB, supported by institutions such as Sri Lanka Customs, Department of Commerce etc., will establish a trade portal (E Export Promotion portal) that will allow the exporters to access reliable trade information on time and trade promotional tools including trade statistics, regulatory requirements, export/import procedures etc.</p>	TIP	EDB	25 Mn
<p>101. The COSTI will be converted into the National Science Technology & Innovation Coordinating Authority (NASTICA) which will be dedicated to convert research into commercial ventures</p>	NES I&E	Ministry of Science, Technology and Research	25 Mn

Items from 2018 National Budget contributing to NES implementation	Applicable to NES, Sector or TSF	Lead implementing agency	Indicative value (Rs.)
102. "Innovators to Industry (I2I)" initiative. The "I2I" aims to connect university graduates and NVQ 4 certified graduates for a registered patent or a viable business idea with the industry. (Industry will adopt the Innovator). The Government will bear: <ul style="list-style-type: none"> the monthly salary, i.e., 50% up to a maximum of Rs. 50,000 per month for a period of 24 months, and the cost of patenting in Sri Lanka and counsel on patenting 	I&E	Ministry of Finance and Mass Media	
103. PDE initiative through the Mechatronic Enabled Economic Development Initiative (MEDII) which will consist of the shared services in Standards, Training, Prototyping and Test Facility (SPTF) and the Long Term Loan Facility (LTLF).	EEM IT-BPM BB	Ministry of Science, Technology and Research	350Mn
105. The boat building industry has been identified to have significant potential as an export industry while paving the way for nautical tourism. As such, we will introduce the necessary regulations to facilitate this industry to grow, including the introduction of a system for standardization and quality assurance and, will also create dedicated industry zones in Trincomalee and Koggala, facing the waterfront. We will exempt the upfront payment of NBT and PAL applicable on the sale of yachts built by Bol companies to the local Bol charter companies.	BB	EDB	100 Mn
106. The country still has a competitive advantage in the spice and concentrates industry. Our support will be as follows: 107. Stringent regulations will be imposed to ensure good quality products protecting the SriLankan identity.	Spices	-Do-	
108. The Cinnamon and the Pepper industry will be supported for value addition and to increase production, by providing incentives to increase the production of high quality planting materials in 1,000 nurseries.	Spices	Ministry of Primary Industries/ Department of Export Agriculture	50Mn
109. Activities will be strengthened at the Cinnamon Training Collage.	Spices	EDB	50Mn
128. The para-tariffs imposed on certain imported food and beverages will be removed. (The list is included in the Technical note).			
138. The EDB together with the SLTDA will invest in the development of a "Branding SriLanka Cuisine" initiative.	PF&B NES	Ministry of Tourism Development & Christian Religious Affairs	
146. We will also introduce an integrated Land Registry (eLR), digitized 45 Land Registers,	NES (land bank)	Ministry of Lands & Parliamentary Reforms	150Mn.
146. We will also introduce and establish a National Single Window connecting 31 State agencies with the Customs Department.	NES Logistics	Ministry of Development Strategies and International Trade	325Mn.
151. If "Enterprise SriLanka" is to succeed, ... <ul style="list-style-type: none"> "Market Oriented Vocational Training" Invest in developing vocational training institutions to develop high quality market oriented training programmes. <i>Supported by "Employment Preparation Fund"</i>	NES IT-BPM BB EEC Logistics Wellness Tourism	Ministry of National Policies and Economic Affairs	2,500Mn.
176. Will support the Colombo University's initiative to collaborate with the industry needs and venture into new streams such as Data Science, Big Data analytics, Actuarial studies, Business analytics etc. 177. The Vavuniya Campus of the Jaffna University will also be strengthened to include a state of the art library facility and an IT center.	IT-BPM	Ministry of Higher Education & Highways	250Mn
206. A comprehensive food hygiene and food safety system will be developed in collaboration with the relevant line agencies.	NQI P F&B Spices	Ministry of Health, Nutrition & Indigenous Medicine	25Mn

Items from 2018 National Budget contributing to NES implementation	Applicable to NES, Sector or TSF	Lead implementing agency	Indicative value (Rs.)
269. The Government will support, by way of grants, selected small industries throughout the Northern Province by empowering the vast network of Producer Cooperatives in the Province.	P F&B Spices	Ministry of Prison Reforms, Rehabilitation Resettlement and Hindu Religious Affairs	1,000Mn
270. We will also establish 2 food processing centers in Delft Island and Kilinnochchi, specializing in Sap based produce such as Palm Juggery, Palmyra fruits and Tuber processing, respectively.	P F&B	Ministry of National Integration and Rehabilitation	40Mn
285. The Consumer Affairs Authority will be strengthened to protect the consumer from price and quality manipulators	NQI	Consumer Affairs Authority	
287. We will introduce new legislation to replace the 148 year old Customs Ordinance to meet our commitment to liberalize trade with the necessary safeguards. In line with the objective of ensuring a paperless clearing system, acceptance of digital signatures for electronic documents will be in operation soon.	NES Logistics	Customs	



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APPENDIX 3: GOVERNANCE OF THE NES DESIGN PROCESS

The following governance structure is proposed to ensure a good balance of views and perspectives between the public and private sector institutions that have a bearing on trade performance.

Cabinet Council on Economic Management

- Provide high-level guidance relating to the overall NES design and implementation process.

NES Navigator – State Minister of International Trade

- Lead the process of NES design.
- Ensure the process is highly consultative, with continued communication with and between all relevant stakeholders.
- Secure the engagement of the public sector, private sector and civil society representatives.

NES Core Team – senior public and private sector representatives

- Play a thorough leadership role throughout the design of the Strategy.
- Conduct targeted, focused group meetings to review the Strategy design progress and provide regular feedback to the NES secretariat.
- Review and confirm strategic orientations to guide the NES design process.
- Ensure that the final Strategy document encapsulates the interests of stakeholders.
- Create visibility for and champion the Strategy at the national level throughout the process.
- Consult national stakeholders and interact with high-level authorities, as a way to achieve the required buy-in of stakeholders and Government.
- Support targeted advocacy and resource mobilization efforts for Strategy endorsement and implementation.

NES Secretariat – EDB

- Support the NES Navigator and Core Team for successful completion and endorsement of the NES.
- Collect, centralize and preserve all archives and documentation related to the NES design process.
- Identify and mobilize relevant public and private stakeholders to be involved in the design of the NES.
- Organize national, sectoral and regional meetings required to ensure an inclusive and participative NES design process.
- Organize communication and outreach efforts to promote the NES as a key driver for national development.



Photo: Alexandra Golovko (ITC)

APPENDIX 4: SECTOR SELECTION METHODOLOGY

The NES export potential assessment combined findings from key international institutions that have analysed opportunities for increasing export growth of Sri Lanka.

There were overlaps in the findings of these various studies, namely because each methodology, while distinct,

incorporates similar analysis of what Sri Lanka is best at exporting. The methodologies differ in their assessment of competitive advantage; in particular the treatment of opportunities for emerging or infant industries, and the emphasis on factors such as market access and growth dynamics.

Various approaches to determining export potential

The Harvard Centre for International Development, Commonwealth Secretariat and ITC have all employed statistical techniques to determine the export potential of Sri Lanka's industries. The findings overlap for some industries but differ for others. A brief explanation of each is provided below.

- The Centre for International Development focuses on existing trade patterns to explain the ability of a country to move into new industries due to the sophistication of existing industries.
- The Commonwealth Secretariat assesses existing flows and, based on this, looks at extending the flows into new markets or intensifying trade in existing markets.
- ITC analyses the dynamics of growth and performance of trade, but also market access conditions, and also uses a product space approach for moving into new sectors.

Table 1: Number of products identified per sector at Harmonized System 6 level with export potential

Sectors	Commonwealth Secretariat	Harvard Centre for International Development	ITC
Tea			2
Rubber and rubber-based products	3	7	3
Apparel and textiles	13	2	17
Fisheries	3		2
Fruits, vegetables, crops	2		
Electronics and machinery	5		
Insulated wires		4	
Printed circuit boards		3	
Diamonds, gems and jewellery			
Coconut-based products	1		2
Spices and essential oils	2		2
Boating industry	2	7	
Food, feed, beverages	2		2
Chemicals and plastics	2		3
Wood, toys, gifts, handicrafts and handloom	1		1
Footwear and leather	1		
Ceramics, porcelain, glass, sands, metals and minerals	5		3
Other products	3	3	3
Paper, printing and packaging			

Source: ITC; Harvard Centre for International Development; Commonwealth Secretariat, 2016.

Note: The numbers in the table represent the number of products identified as having export potential at the Harmonized System six-digit level. No numbers mean no products were found to have a potential in that sector.

Table 1 highlights the number of subsectors in each sector that are found to have high untapped export potential according to the methodology used.

Due to limitations in availability of international trade data, it is not possible to complete export potential assessments for services. As indicated above, services represent a fast-growing segment of Sri Lanka's exports but few have confirmed export trends and sufficient maturity to support export development in the next five years. Based on this, the following services sectors were also considered in the short-listing process:

Construction services	Information and communications technology	Engineering services
Educational services	Wellness and medical services/tourism	Professional services

In addition to the export potential analysis, extra indicators were considered for sector selection, such as a sector's ability to meet national policy and socioeconomic objectives. Through an inclusive and consultative process, public and private stakeholders involved in Sri Lanka's export development provided their assessments of weights to be given to each criterion. They then assigned scores to each of the dimensions considered (ranging from 1 (low) to 3 (high)) to the 27 potential sectors (goods and services). The overall calculation of ranks was then computed using the weighted average scores provided per sector, as well using an average ranking index to avoid biases in the weighing of criteria. Both calculations were used to determine the sectors with the highest ranking.

CRITERIA USED IN THE SECTOR SHORTLISTING EXERCISE

Summary of criteria used by the export performance assessments	Additional criteria used in the public-private consultative process
<ul style="list-style-type: none"> Current/past export performance Global import demand, including share of a product in total demand Market access conditions (tariffs, distances) Percentage of unused potential (per specific markets) and supply capabilities Revealed comparative advantage Product space analysis Stability of export revenue (qualitative) 	<ul style="list-style-type: none"> Alignment with the Government's development agenda Potential for attracting investment/technology upgrading and value addition Social integration considerations – regional development, gender and youth integration Environmental sustainability Medium-term outlook for addressing the key constraints in the sector Links and spillover effects with other priority sectors



Photo: ITC

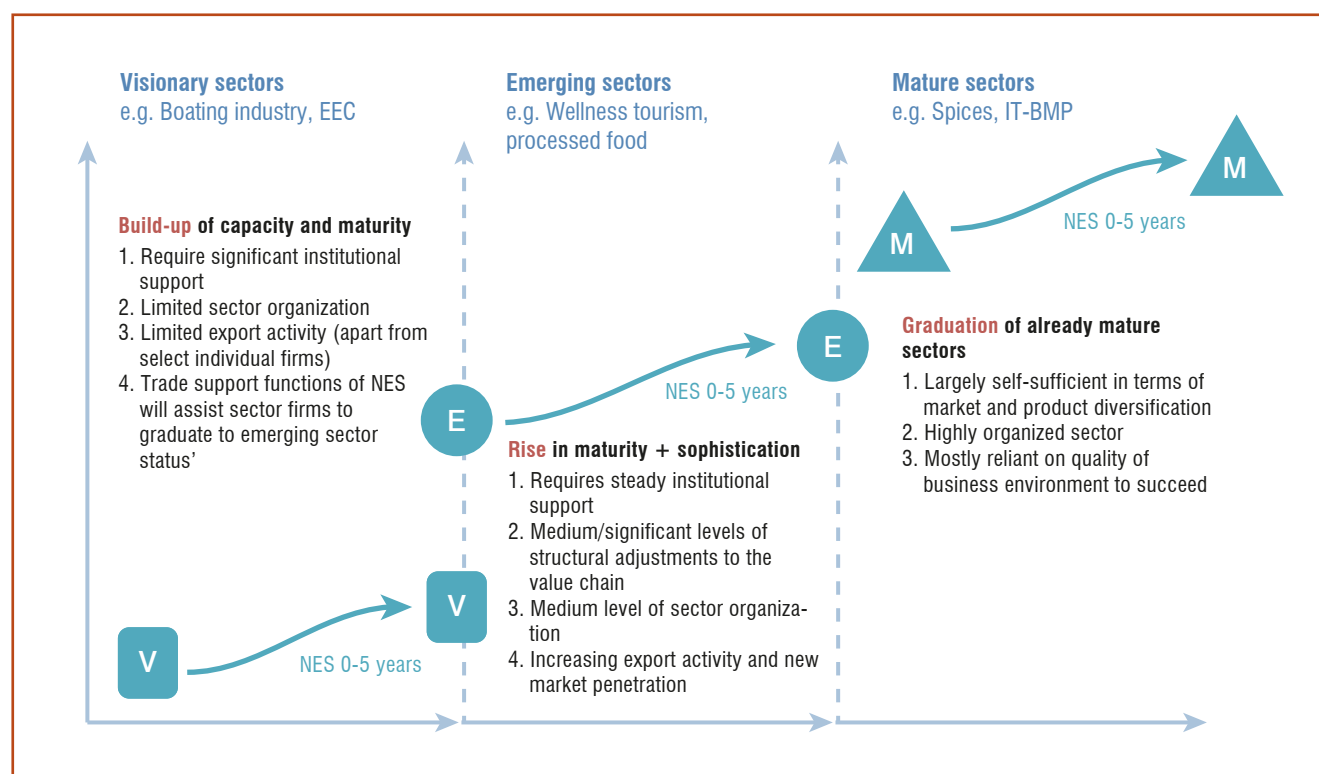
ADDITIONAL CONSIDERATIONS FOR FOCUS SECTOR SELECTION

In addition to the above parameters, the public-private stakeholders at the NES first symposium in April 2017 were asked to consider the following dimensions when ranking sectors.

A mixed portfolio of sectors

The portfolio of focus sectors supported by the NES should reflect the potential and existing capacity within Sri Lanka. As such, the goal was a balance between agricultural, manufacturing and service sectors, with added emphasis placed on those industries that are emerging in global markets. Finally, due consideration was made to include visionary (future) sectors, emerging (infancy) sectors and mature (traditional) sectors.

Figure 24: Mixed portfolio of sectors with maturation time frame



The Strategy implementation time frame also dictates the sectors to be included

The NES is a medium-term strategy as far as the vision and strategic objectives are concerned, with strategic PoAs framed to be implemented in five years. As such, the NES needs to be focused on a few sectors that can be effectively upgraded during the implementation period. The next NES – after the five-year time frame has elapsed – will allow the selection of new focus sectors that became ripe for export growth.

Institutions must evolve in parallel

Institutions remain fundamental to the success of any sector development. Sectors that are better organized through unions, cooperatives and sector associations stand a better chance of steering the NES implementation to ensure the targets are achieved. The presence of organized support provides a favourable framework to build consensus and bring the sector to the next level of sophistication.

No replication of existing strategies

Established export sectors such as apparel, tea and rubber have proven their ability to compete in world markets. Their

strategies are driven by strong private sector ownership and build on the sectors' competitive advantages.²⁹ While these sectors are the backbone of Sri Lanka's export performance, innovation and export diversification are needed to complement these existing star performers.

Contribution to innovation and export diversification

This NES provides a road map towards a more innovative, diversified and resilient export sector through the promotion of focus sectors that do not yet contribute significantly to Sri Lanka's exports but have high potential to achieve international competitiveness over the coming five years. This is also in line with the vision and the fourth strategic objective. Sectors that are active in R&D and innovation can function as best practice examples for other sectors.

29.– The rubber sector has the *Sri Lanka Rubber Industry Master Plan 2017–2026* and the textiles sector is currently in the process of developing its own new sector strategy. Similarly, the coconut product industry has its own sector *Strategic Plan 2016–2020* supported by the Coconut Research Institute. Moreover, many products belonging to the coconut product sector, such as coconut oil and desiccated coconut, are covered in the *Processed Foods and Beverages Sector Strategy*. Other important sectors with high export potential, such as the fisheries sector, are already receiving strong support to develop strategically.

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