
AMERICAS COMPETITIVENESS FORUM 2008

Promoting Prosperity and Economic Opportunity

FINAL REPORT

U.S. DEPARTMENT OF COMMERCE
INTERNATIONAL TRADE ADMINISTRATION

In partnership with:

The City of Atlanta

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LETTER FROM SECRETARY GUTIERREZ

Our region must strategically rise to the challenge of an increasingly global and competitive marketplace. Leaders of the public and private sectors must implement policies that expand opportunities for innovators and entrepreneurs who bring new ideas, technology, and capital to our economies. The Second Americas Competitiveness Forum (ACF 2008) demonstrated that leaders from across the hemisphere have the ability to approach this challenge with creativity, determination, and energy.

This report highlights the key themes from the ACF 2008: Alliances in Business and Education, Renewable Energy and Sustainable Resources, Travel and Tourism, and Trade Logistics. The report also includes details of all plenary sessions, the highly-subscribed regional market opportunities sessions, and business-to-government meetings. Finally, it provides the results and analysis from our interactive Competitiveness Perceptions Survey. I hope you will find the information contained herein empowering and compelling.

I look forward to continuing the success of the Americas Competitiveness Forum when Chile hosts the Third Americas Competitiveness Forum (ACF 2009) from September 27th to 29th. Together we can develop policies and strategies that will promote greater growth and economic prosperity throughout the region.

Sincerely,

Carlos M. Gutierrez

INTRODUCTION

In June 2007, U.S. Secretary of Commerce Carlos Gutierrez hosted the inaugural Americas Competitiveness Forum (ACF) in Atlanta, Georgia. The forum was born of a commitment made by U.S. President George W. Bush following the 2005 Summit of the Americas to convene a high-level meeting to enhance the region's ability to compete more successfully in the global marketplace. Approximately 1,000 representatives from the Hemisphere's public and private sectors participated in the inaugural ACF. Twenty-five countries from the region sent official government delegations, including Minister-level government officials with responsibility for economic issues.

The success of the inaugural ACF laid the foundation for a second ACF, held in August 2008, in Atlanta. The commitment for ACF 2008 included the Heads of State from Colombia, El Salvador, and Guatemala, in addition to 23 Minister-level government officials.

The private sector showed equal eagerness to participate in a sustained, regional dialogue on competitiveness issues. Approximately 35 percent of ACF participants hailed from the private sector, including high-level private sector representatives such as Eduardo Castro-Wright, President and Chief Executive Officer, Wal-Mart Stores, U.S.A; Ray C. Anderson, Founder, Chairman, and Chief Executive Officer, Interface, Inc.; Jim Balsillie, Co-Chief Executive Officer Research In Motion; and Paul Bell, President, Americas, Dell, Inc., among others. Additionally, ACF 2008 received widespread media coverage including CNN en Español, the Wall Street Journal, the Atlanta Journal Constitution, and the Miami Herald.

The goals of the ACF are to: (a) highlight national, regional, and local examples of best practices in competitiveness; (b) introduce participants to innovative industry practices and successful public-private partnerships; (c) facilitate discussions between the public and private sectors about the drivers and impediments of economic growth; and (d) provide businesses the opportunity to learn about and take advantage of trade and investment opportunities in the region.

One unique aspect of the ACF is that it allows the private sector to take advantage of opportunities to pursue additional business. ACF 2008 featured a number of meetings between the business community and foreign government officials; the U.S. Department of Commerce's International Trade Administration provided over 200 one-on-one export counseling sessions to U.S. businesses interested in pursuing new business in the Hemisphere.

ACF 2008's four key thematic topics were: Alliances in Business and Education, Renewable Energy, Trade Logistics, and Travel and Tourism. This Report summarizes the key discussions of ACF 2008, including regional examples, lessons learned, and preliminary insights on next steps. In addition to the four program tracks, ACF 2008 also featured Regional Market Opportunity Sessions where participating nations discussed trade and business opportunities in their respective countries.

Several recurring themes emerged from ACF 2008 on fostering competitive environments:

- Governments have to create the right policies and conditions for expanding trade and investment.
- An effective regulatory and licensing system that is transparent and consistent is essential.
- Infrastructure for the efficient movement of goods, information, and people is critical to growth.
- A long-term strategy is needed to meet energy needs and challenges in an environmentally sound way.
- There's a correlation between the availability and quality of education and economic competitiveness and prosperity.

Noteworthy accomplishments of ACF 2008 include:

- **Commitment by the countries in the Western Hemisphere** to continue cooperating on economic issues. Chile will host the 2009 ACF and the 2010 ACF will be held in Atlanta.
- **Increased trade and investment opportunities** explored during the more than 200 business meetings facilitated by the U.S. Department of Commerce in Atlanta.
- **Western Hemisphere Textiles/Apparel Cooperation** to promote further growth in the region's textiles and apparel trade.
- **Latin American Small Business Initiative** launched to help small businesses in the Americas take advantage of trade opportunities in the hemisphere.

We believe that the ACF has facilitated a productive dialogue between the public and private sectors on competitiveness issues. We look forward to deepening this dialogue and furthering the cooperation established during the first two fora at the next ACFs in Santiago, Chile in September 2009, and Atlanta in 2010. We hope you join us.

HOW DOES THE REGION PERCEIVE ITS OWN STATE OF COMPETITIVENESS?

As part of an expanded agenda, organizers at the Second Americas Competitiveness Forum conducted a survey on competitiveness in the region. Respondents from across the region and from a variety of sectors took the survey at the ACF or online in the weeks following the Forum. This sample group proved representative of the nearly 1000 attendees, and provided much insight into perceptions of competitiveness throughout the Hemisphere.

The Methodology

There were a total of seventeen questions. Participants were asked to identify themselves and their views of their respective country’s competitiveness, as well as that of the region as a whole. The survey included such questions as: Which factor, in your estimation, has the greatest impact on the region’s ability to compete successfully in the global market? What policy priorities should governments focus on to improve competitiveness? What is the best way to integrate the informal economy?

Survey Highlights

Some of the most enlightening responses were those regarding barriers to competitiveness. Participants were asked to identify the biggest negative effect on competitiveness, and what governments should do to improve competitiveness. The results overwhelmingly suggested that weak educational systems serve as the greatest impediment, and that improving education and vocational training, especially in secondary schools, would strengthen the region’s ability to compete.

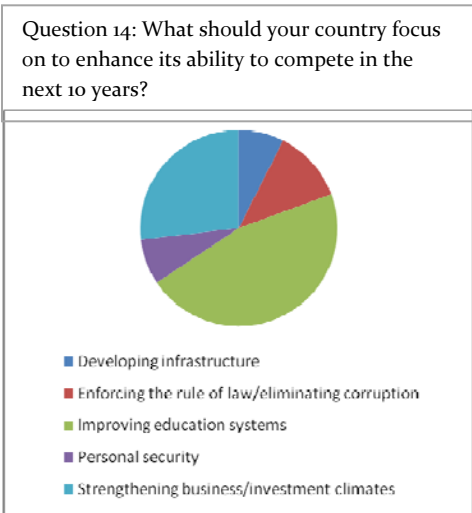
Other impediments cited in the survey include a weak business climate in North and South America, and personal security and corruption as major barriers in the Caribbean and Central America.

How Do We Measure Ourselves Against Each Other?

Also interesting were sub-regional responses. The results showed that the Caribbean participants perceived their region to be the least competitive, while North Americans perceived themselves as very competitive. Participants from Central America viewed their region as competitive, while South American participants ranked themselves as generally less competitive than other sub-regions.

The Full Survey

The competitiveness survey gives a unique perspective on the state of competitiveness in the Hemisphere and recommendations from ACF participants on how to enhance economic prosperity in the Americas. The full results from the survey can be found in the appendix.



PLENARY INSIGHTS

The Americas' Global Image: A Media Perspective

August 18, 9:00 a.m. – 9:45 a.m.

Participants:

Alberto Padilla, CNN en Español

Maria Elvira Salazar, Mega TV

Daniel Fernandez Canedo, Clarin Newspaper

Sergio Sarmiento, Reforma, TV Azteca

The ACF Plenary Panel entitled, “The Americas’ Global Image: A Media Perspective” featured a discussion among well-known media personalities and journalists from the Americas on the major economic and political issues that contribute to and detract from the global and regional image of the Americas. The topics discussed during this session were far reaching, from inflation to immigration, from the drug trade to free trade, from freedom of the press to the repression of journalists, from journalistic responsibility to education in the region.

The panelists conveyed that, through the lens of the media, the Americas has much work to do in terms of its global competitiveness image especially when compared to regions such as Eastern Europe and Asia. For example, according to panelists, Venezuela may be competitive with its exports of oil and Argentina may be a competitive producer of beef and soy, but the region needs to have a better long term competitiveness strategy (beyond commodity exports) and a higher standard for what constitutes solid annual economic growth. Panelists agreed that 3-4% annual growth without inflation, paired with economic stability, is not enough to get many countries and its residents out of poverty, and yet, many countries tout 3-4% growth as a success story.

Lessons Learned

Panelists acknowledged that the media needs to do a better job of covering the success stories. For example, the press could highlight how NAFTA has created jobs in all countries party to the agreement and how CAFTA is providing a better life for citizens in Central America. Ultimately, panelists agreed that the media is responsible for transforming the Americas’ image in the world.

Panelists agreed that a country’s economic stability, prosperity and ability to compete are inextricably linked to the degree to which it protects civil liberties and freedom of the press. A country’s press must be able to report on the importance of trade, as well as its benefits and detriments.

Competitiveness in the America: Government Leaders’ Perspective

August 18, 9:45 a.m. – 11:05 a.m.

Participants:

President Alvaro Colom Caballeros, Guatemala

President Elias Antonio Saca Gonzalez, El Salvador

President Alvaro Uribe Velez, Colombia

Secretary Carlos M. Gutierrez, U.S. Department of Commerce

Enrique Garcia, Andean Development Corporation

This session highlighted the economic growth resulting from the policies pursued by Presidents Colom, Saca, and Uribe. The three leaders discussed the importance of close trade relations with their neighbors and the importance of working together in other areas like fighting drug trafficking, providing quality education, and improving trade logistics.

The three presidents expressed a common desire to spread democracy, to see their countries prosper by growing the market, and to sustain their mutual commitment to social justice. They acknowledged that ongoing political tension challenges their ability to expand their economies and increase investor confidence. In order for

their nations to attain security and prosperity in the future, these leaders are committed to improving transparency and transforming the region's image in the global market.

President Uribe emphasized the important role the government plays in building investor confidence. His programs on security and democracy have helped restore trust in Colombia. President Uribe cited several examples of his commitment to social justice, growth, and competitiveness, including: regularly held public town hall meetings; tax reduction policies; efforts to improve trade logistics; and programs to help families send children to school instead of work.

El Salvador's **President Saca** spoke extensively on how a more cohesive Central America could better compete in the global marketplace. El Salvador is home to only 7 million people, but the seven-country region has a population of more than 40 million, about the same as Colombia. He emphasized that more cooperation is necessary to ensure the efficient flow of goods and people across borders while maintaining security standards, and that a transparent and democratic El Salvador is ready and waiting for investors.

President Colom of Guatemala echoed President Saca's calls for further regional collaboration, saying that he hopes to eventually eliminate customs between El Salvador and Guatemala. He acknowledged Guatemala's ongoing struggles with insurgents, kidnappings, poverty and an educational system in need of reform. Despite these challenges, the country's economy has grown almost every year. With regional integration and sound policies, an era of unprecedented prosperity could come to the Americas.

Several best practices were discussed in the panel. For example, the leaders of Guatemala and Colombia hold regular public community councils. El Salvador, with coastline facing the Pacific Ocean, is revamping its port and plans to connect to the Atlantic via a "dry canal" to Honduras and a highway to Guatemala. In addition, El Salvador and Guatemala have begun implementing

education reforms to provide every child with access to a computer and education in both Spanish and Quechua. Colombia provides national health coverage for all and has a program that pays families who choose to send their children to school instead of work. All three presidents remain dedicated to social justice and committed to strengthening alliances in the region which is especially important in an era when democracy and open markets are being tested in the region.

Keynote Luncheon Address

Monday, August 18, 12:30 p.m. – 2:00 p.m.

Participants:

*Eduardo Castro Wright, Wal-Mart Stores, U.S.A.
Ray C. Anderson, Interface, Inc.*

Wal-Mart serves more than 200 million customers weekly in 15 markets worldwide, including the Western Hemisphere. Previously, as President and then CEO of Wal-Mart Mexico, **Mr. Castro-Wright** was credited with transforming this subsidiary into one of Mexico's best retailers and a jewel of Wal-Mart's international arm. Wal-Mart's goal is to grow globally but also to promote economic growth and prosperity in the countries in which it operates. Wal-Mart, with a network of over 60,000 suppliers, is working with small and medium sized businesses in Latin America and the Caribbean. For example, in Guatemala, in partnership with the U.S. Agency for International Development and two non-profit groups, Wal-Mart is training farmers to supply produce for its local stores. In fact, the Inclusive Market Alliance for Rural Entrepreneurs will help small-scale farmers become productive and prosperous entrepreneurs. Most of the fruits and vegetables Wal-Mart sells in its Central American stores are produced locally. But supply glitches have resulted in temporary shortages of products such as lettuce. Wal-Mart wants to diversify its supplier base to keep its shelves stocked as it expands. Farmers who participate will receive training in crop diversification and good agricultural practices, processing, and post-harvest techniques to meet national and international agricultural standards. Wal-Mart is

also looking to give small farmers an opportunity to produce niche items, such as herbs that are too expensive to import.

Ray C. Anderson is the Founder and Chairman of Interface, Inc. Interface began in 1973 when Mr. Anderson recognized the need for flexible floor coverings for the modern office environment. Interface is now the world's largest producer of commercial floor coverings. Inspired by Paul Hawken's *The Ecology of Commerce*, Mr. Anderson set about transforming the petroleum-intensive company into a firm with zero negative impact on the environment. Interface, Inc. is nearly halfway towards its goal of "Mission Zero." This has been accomplished through the redesign of processes and products, the pioneering of new technologies, and the increasing use of renewable materials and sources of energy. Mr. Anderson said his model could be replicated but noted that overcoming the status quo is the most difficult challenge. According to Mr. Anderson, sustainability is the key to long-term competitiveness.

Local Economic Competitiveness: Mayors' Perspective

August 18, 3:30 p.m. – 4:30 p.m.

Participants:

*Governor Celso Jaque, Mendoza, Argentina
Julio Pereyra, Latin American Federation of Cities and Municipalities
Mayor Desmond McKenzie, Kingston, Jamaica
Alexander A. Mejia, CIFAL Atlanta*

This session refocused the hemispheric ACF discussion on the local level. The session featured panelists with several different local leadership perspectives and provided significant viewpoints on how to enhance competitiveness at the national level by investing and coordinating locally.

Local autonomy was a recurring theme in this discussion. For example, 90% of the funding that Kingston's local government receives comes from the central government, leaving local government

leaders with few options for locally focused reforms.

On the other hand, because of the autonomy granted to Buenos Aires as a municipality by the central government and lending institutions, the city is able to determine ways it can spur economic growth through targeted initiatives in areas such as language, technology, and workforce training.

Each mayor or local leader faces diverse issues depending on how his local government intersects with the national government on economic and policy issues. Politics are local but economies are now global, and all must work to promote results-based local policies in order to advance local competitiveness. National competitiveness cannot happen without local competitiveness. Local municipalities share best practices and cooperate on large programs, such as purchases or infrastructure projects for added value and cost savings.

The Trillion Dollar Solution: Facilitating Trade in an Uncertain World

August 18, 4:30 p.m. – 5:30 p.m.

Participants:

*Jim Balsillie, Research In Motion
Minister Jim Prentice, Canada
Beatriz Leycegui Gardoqui, Mexico
Assistant Secretary Israel Hernandez, International Trade Administration*

Every minute almost \$2 million dollars in goods crosses border between the United States and its two largest trading partners: Canada and Mexico. These transactions occur almost seamlessly, with all sides cooperating to ensure that trade flows unimpeded despite concerns about security and other cross border issues. In *The Trillion Dollar Solution: Facilitating Trade in an Uncertain World*, panel participants shared their recommendations for enhancing economic competitiveness in the Americas based on lessons learned from the North American experience. Their starting point was that the North America

Free Trade Agreement (NAFTA) has been a success across North America, making all three countries more competitive and prosperous over the last decade and one half that it has been in force.

Panel participants discussed a number of policy prescriptions that they believe could facilitate enhanced competitiveness throughout the Americas. The panelists cited the need to reform 100 year-old competition and antitrust policies which panelists believe do not adequately reflect the characteristics of global competition in the 21st century. Panelists also cited other ways governments could positively encourage economic growth, including: lowering the tax burdens on fast-growing business, offering research and development tax credits, and investing in business education. Increased intellectual property protection and cooperation on good governance standards were also discussed. Lastly, panelists cited the need for increased legislative and political support for free trade agreements and the creation of new hemispheric relations, both public and private, to enhance the region's ability to compete successfully in the global economy.

A number of best practices were also discussed in this session. For example, Canada continues to aggressively support free trade agreements across the region by negotiating agreements with several countries including: Chile, Peru, Costa Rica, and potentially Panama, Colombia, and the Caribbean. Canada is also investing in its Gateways and Corridors Fund which will develop global supply chains from North America to Asia, and improve trade facilitation and infrastructure throughout Canada and North America.

Mexico is also undertaking several initiatives to improve its competitiveness. According to a World Bank study, improving trade facilitation could save close to \$400 billion a year, and increase exports from Mexico by 21%. Mexico's National Infrastructure Plan is investing \$250 billion in infrastructure between 2007 and 2012.

Lastly, the countries of North America are cooperating regionally through the Security and Prosperity Partnership of North America (SPP) on trade facilitation measures like standardizing operating hours for ports-of-entry and liberalizing cross-border trucking services.

Strategies for Tourism Diversification

August 19, 8:30 a.m. – 9:45 a.m.

Participants:

Minister Mercedes Araoz, Peru

Secretary Rodolfo Elizondo Torres, Mexico

Minister Luis Guillermo Plata Paez, Colombia

Minister Allen M. Chastanet, St. Lucia

Recent trends in the global economy have brought new challenges to the tourism industries of the Americas. Tourism ministers from four nations shared how they are developing innovative policies and strategies to improve the market position of their destinations, and how they are using product diversification and linkages to other economic sectors to drive competitiveness.

Travel and tourism is an industry that is just now being recognized as a strong economic development tool. The development of Travel and Tourism Satellite Accounts in nations throughout the region allows for measuring the impact of the industry on a macro basis. Consolidating and developing new products is a major priority for tourism destinations throughout the region, as all are mindful that the tourism market has grown in complexity and requires swift responses to consumer demands. SMEs that cater to active/adventure tourism lessen pressure on peak seasons and more popular attractions. Adventure travelers naturally disaggregate as they explore in search of pristine places or authentic cultural interaction in uncongested areas and seasons. In order to attract international travelers, destinations must expand their tourism offerings while simultaneously ensuring the proper "care and feeding" of the tourism assets that are at the root of that attraction. Safety and security must be at the forefront of all tourism development, as travel will suffer in destinations

where visitors do not feel they are sufficiently safe and protected from harm.

Mexico has taken measures to foster the development of regional tourism products that would help “spread” visitor traffic to less well-known destinations. In Mundo Maya, for instance, Mexico has signed aviation agreements with other governments in the region to facilitate the corresponding air connectivity needed to move visitors to these lesser-known destinations. In addition, they are working and investing jointly with Honduras, Guatemala, El Salvador and Belize in promotional programs at international consumer and trade fairs in London, Berlin and other venues. Peru has recognized the critical need to diversify touristic products that are sustainable and good for the country’s ecosystem. They also recognized that they must simultaneously generate a business climate that makes it easy for businesses to undertake this development and diversification. To date, the government has streamlined the process for getting business development certificates, as well as environmental and cultural licenses, to make it easier to operate in the tourism sector in Peru. Colombia’s primary challenge in the travel and tourism industry has been to dispel the perception that the country is not safe to visit. They have been addressing safety and security issues for residents and visitors alike for more than five years, and there is finally a discernable difference between perception and reality.

Colombia will continue to work to close the gap between perception and reality so that over time the country’s image improves. As international travelers seek out new and interesting destinations to visit, Colombia will become the focus of interest. In addition, they will continue to host familiarization tours for travel trade and travel media so that industry experts will, in turn, help “sell” Colombia to trade clients and consumer travelers. Peru will continue to develop areas that have not previously been “mainstream” for visitors, hoping to spread out the impact visitors have on the ecosystem and the infrastructure. Additionally, Peru will work with neighboring countries to build the high-end

convention trade to South America, offering Peru as a leisure destination for pre- and post-convention travel to other destinations, such as Uruguay. Mexico will continue to smartly grow their travel and tourism industry by preserving natural places and developing urban areas. This will allow services to be offered to visitors without overpopulating or overdeveloping an area. The current President of Mexico has provided a significant increase in the tourism budget, which will help the Ministry of Tourism strengthen its global competitive position. *National Geographic Adventure* is developing adventure/active travel programs with countries throughout the region to foster growth for SMEs.

Outlook for Energy: A View of 2030

August 19, 9:45 a.m. – 10:00 a.m.

Participant:

Neal Goins, ExxonMobil Ventures Mexico, Inc.

Mr. Goins gave an overview of the energy outlook for the Western Hemisphere. He noted that population growth and economic progress, especially in developing countries, will drive global energy demand higher, despite substantial efficiency gains. Oil, natural gas, and coal are indispensable to meeting the growing energy demand even with the rapid growth in renewables. The challenge for ExxonMobil and others is to supply the energy that the world needs to grow. The key factors for investment promotion are a skilled, educated workforce and adequate infrastructure.

Innovation at the Intersection of Cultures and Disciplines

August 19, 10:00 a.m. – 10:45 a.m.

Participant:

Frans Johansson, Author of “The Medici Effect”

Mr. Johansson illustrated how combining diverse ideas, perspectives, industries, people, and cultures results in world-class innovation and success – both in profit and productivity. He

provided recommendations on how to make these intersections happen and showed how diverse teams generate far more innovative ideas.

Who would have considered designing an office building based on termites' construction methods? Yet that intersection occurred when the architect, working with a multidisciplinary team, created a building in Harare, Zimbabwe, with no air conditioning and a 90% energy savings over similarly-sized buildings. With that and other examples, Mr. Johansson showed why diversity drives innovation. He also gave advice for how companies and governments can leverage existing diversity and increase it. He recommended that organizations staff for innovation, that business, education and government find innovative solutions in workforce development, and that companies and governments should try as many ideas as possible. Lastly, Mr. Johansson pointed out that risks are minimal and that humans are not very good at predicting what will and won't succeed – so a diversity of perspectives, cultures and experiences can only increase the likelihood of success.

Keynote Luncheon Address

Tuesday, August 19, 12:30 p.m. – 2:00 p.m.

Participants:

Sandy Baruah, Small Business Administration
Ralph R. Peterson, CH2M Hill

Sandy Baruah of the U.S. Small Business Administration spoke about growing economies. He explored the five new realities of economic development: (1) we are living in a global marketplace; (2) worldwide competition is intense and the pace of change is accelerating; (3) the world becomes more complicated every day; (4) collaboration between the public and private sector is critical; (5) the ability to innovate is the only sustainable competitive advantage. He compared the differences between public and private sector involvement in job creation. Some of the best practices he cited included free trade agreements, global manufacturing locations, the internet, and workforce development.

Ralph Peterson is Chairman and CEO of CH2M HILL, one of the world's leading environmental engineering firms with an annual revenue of \$5.12 billion and 25,000 employees worldwide. Not only did the Panama Canal Authority select CH2M HILL to manage its \$5.25 billion canal expansion, Engineering News Record ranked the company as the top U.S. environmental firm in its Top 200 Environmental Firms list for three years.

Mr. Peterson highlighted the importance of infrastructure in competitiveness. He explained the two types of competitiveness, constructive and destructive competitiveness. Constructive competitiveness harnesses innovation, whereas destructive competitiveness views competition as a zero-sum game, where one's win is another's loss. He emphasized the importance of constructive competitiveness, and how forums like the ACF will help generate such attitudes towards competition. He highlighted best practices, from his work with the Panama Canal to the London Olympic Games. One important infrastructure project he cited was the conversion of waste water into drinking water in Singapore, which helped sustain the environment and replenish the area's water supply. In the Panama Canal, he was able to conserve water by using water saving basins, so that the limited water in parts of the canal would not hinder its productivity.

Enhancing Competitiveness in the Americas – Perspectives from the Region

August 19, 3:30 p.m. – 4:15 p.m.

Participants:

Assistant Secretary Thomas A. Shannon, Jr., U.S. Department of State
Vice President Jaime Morales Carazo, Nicaragua
Mayor Alejandro Char Chaljub, Barranquilla, Colombia
Ambassador Hector Morales, Organization of American States

Mayor Char and Vice President Morales detailed the economic and social progress their respective city and country have made in the past few years, while Assistant Secretary Shannon focused on U.S.

efforts to build an inclusive community in the Western Hemisphere.

Despite its strategic location in Northern Colombia, Barranquilla's reputation suffered during the early 1990s. Barranquilla was a border city in a nation with closed borders, wrought with narco-trafficking. As the market slowly began to open in the mid-nineties, however, Barranquilla was able to take advantage of its location along the Caribbean and soon became a booming trading center. Barranquilla is now open for business, particularly with North America, and the city and its people have never been more prosperous.

Vice President Carazo noted that Nicaragua has had a similar past. War brought destruction and social upheaval, but it was also a stimulus for reconstruction and a newfound social cohesion. Nicaraguans now have a desire for security and a spirit of rehabilitation. Economic growth is healthy, and the government is on the verge of embarking upon a new economic program to increase competitiveness.

Finally, AS Shannon stated that the United States is committed to the flourishing democracies in the Western Hemisphere. Our nations share political values and economic understanding, and building economies around openness and inclusiveness will lead to greater prosperity for all. The nations of the Western Hemisphere must work together to manage globalization and create models of competitiveness that bring wealth to all, especially the lowest levels of society.

Keynote Presentation

August 19, 4:15 p.m. – 4:30 p.m.

Participant:
Paul Bell, Dell Americas, Inc.

Mr. Bell's presentation centered on the linkages between the global debate on environmental policy and the information technology industry's

role as a driver of economic growth and productivity. He emphasized the importance of developing and implementing an innovative, strategic information technology infrastructure that focuses on four areas: e-learning, accessibility, energy efficiency, and productivity. Mr. Bell believes that these components have a significant impact on profit margins and return on investment.

He cited several best practices adopted by the Dell Corporation that have resulted in reduced energy consumption and increased productivity. For example, Dell uses video-conferencing, in lieu of in-person meetings, with representatives and clients in multiple locations. Dell's "green" philosophy is based on an environmentally sensitive, four-step life cycle which includes: product design, manufacturing and operations, customer purchase and use, and end-of-life. Dell has incorporated guidelines in every phase of the cycle that not only promote greater energy efficiency, but also enhance their competitive edge. Additional information can be found at www.regeneration.org.

Keynote Presentation

August 19, 4:30 p.m. – 4:45 p.m.

Participant:
Governor Sonny Perdue, Georgia

The State of Georgia has experienced tremendous growth since Governor Sonny Perdue took office. The state has broken trade records, widened the availability of affordable healthcare, and saved energy and promoted green businesses.

One of the best practices Governor Perdue has implemented is a work-ready certification program for job applicants. Those seeking work can demonstrate their skills and abilities via assessments that are available at technical colleges throughout the state. The database of certificate-holders is available to businesses, allowing them to choose potential hires from a strong, vetted workforce.

Governor Perdue's program for economic growth has been successful, leading to greater innovation and growth among Georgia's businesses and a higher standard of living for Georgia's citizens.

ACF Closing Ceremony

August 19, 4:45 p.m. – 5:30 p.m.

Participants:

Secretary Carlos M. Gutierrez, U.S. Department of Commerce

Mayor Shirley Franklin, Atlanta, Georgia

Minister Hugo Lavados, Chile

Secretary Gutierrez spoke of the importance of freedom, and how it fosters a climate of excitement that leads to innovation, growth, and new ideas. To that end, he argued that the biggest and most powerful economic and competitiveness strategy we have is freedom. Secretary Gutierrez also expressed his enthusiasm and support for ACF 2009, which will take place in Chile. He urged all participants to work towards adopting many of the best practices highlighted at the Forum in order to strengthen the Hemisphere's competitive edge, noting that what we have accomplished through the ACF is significant and should be embraced by the Americas.

Minister Lavados touched on five points that he considers crucial to competitiveness. Investing in human capital is the most important component of competitiveness. Chile has set aside \$6 billion to fund scholarships for Chilean students to study post-graduate degrees internationally. Second, Minister Lavados emphasized the importance of local and regional development as sub-national entities take on increased responsibilities. Third, he spoke of the importance of streamlining government bureaucracy, so that registering a company would not involve so many steps. Fourth, he emphasized the importance of small and medium enterprises. In Chile, SMEs account for almost 60 percent of employment, and 80 percent of all companies. Minister Lavados added that it is important to create a system in which business can take innovative risks without fearing the stigma of failure. Finally, he

mentioned the importance of a national strategy for innovation.

Secretary Gutierrez, Mayor Franklin, and Minister Lavados signed a Letter of Intent (LOI) to facilitate cooperation between the United States Department of Commerce, the City of Atlanta, and the Ministry of Economy of Chile regarding preparations for the Government of Chile's hosting of the third annual 2009 Americas Competitiveness Forum. The 2009 ACF will be held in Santiago, Chile in September 2009,

MAIN THEMES

Alliances in Business and Education

Education is consistently cited as one of the biggest obstacles to improving the region's competitiveness in the global economy. There is a clear need to identify creative, flexible partnership models among government, industry, and the academic community. These relationships can develop marketable technologies and foster entrepreneurial activity that will enhance economic growth and opportunities throughout the Americas. The Alliances in Business and Education track explored these issues through the following panel discussions:

The Role of Competitiveness Councils in Promoting Competitiveness

August 18, 11:00 a.m. – 12:15 p.m.

Dr. Roberto Newell Garcia, Mexican Institute for Competitiveness
Claudio Gastal, Brazil Competitiveness Movement
Hernando Jose Gomez Restrepo, Private Council on Competitiveness, Colombia
Antonio Rodriguez Mansfield, Dominican Republic Competitiveness National Council
Deborah L. Wince-Smith, U.S. Council on Competitiveness

This panel engaged leaders from competitiveness councils of the United States, Brazil, Mexico, Colombia, and the Dominican Republic in a discussion of different models of competitiveness councils and various missions pursued by these organizations in the Hemisphere. Panelists showcased how their organizations function in different economic environments and discussed how they are effective in addressing the issue of competitiveness in their respective country.

Discussion Highlights –

- The panel defined competitiveness as a country's ability to attract and retain investments and talent.
- In today's competitive global market conditions, there is an increased need for private-public sector collaboration on issues

of competitiveness. Competitiveness Councils are organizations composed of private and public sector leaders who come together to discuss national competitiveness issues and work to make and/or change policy that will allow their country to better compete.

- All recognized the importance of infrastructure, education, investment, and talent as the foundation to support innovation as a driver of economic growth and activity.
- Each Competitiveness Council is funded, managed, and influences policy and opinion in different ways. Therefore, representatives from each Council recognized the value in sharing ideas with each other and have agreed that the ACF is a natural fit for annual meetings of Councils from the Hemisphere.

Regional Best Practices –

- By gathering information and priorities from the private sector and academia and passing them on to the Colombian government through policy proposals and action plans, Colombia's Private Council on Competitiveness has helped to form Colombia's National Competitiveness Policy (CONPES 3527). As part of the National Competitiveness Commission, the Private Council on Competitiveness has installed thirty Regional Competitiveness Commissions across the country.
- Brazil Competitiveness Movement (MBC) has created many programs focused on spurring innovation and encouraging small business growth. Partnering with the U.S. Council on Competitiveness and the Brazilian Agency for Industrial Development (ABDI), MBC formed a *Call to Action*, which centers on three critical enabling conditions for innovation: talent, investment, and infrastructure. This program calls on nations and partners across the Americas to focus on an innovation agenda that will prepare all countries in the Americas for success in the 21st century.
- The Mexican Institute for Competitiveness (IMCO) utilizes many vehicles to advocate reforms and influence policy makers. Effective modes of communication include

not only radio, television, magazines, the internet, but building partnerships in organizations such as the North American Competitiveness Council and the Senate's Competitiveness Committee. IMCO and its affiliates use fact-based, non-partisan research to share results of public policy reforms.

Lessons Learned -

- Sustainability, independence, and the capability to underwrite long-term operations are fundamental to promote competitiveness and achieve results.

Characteristics of a Successful Public Private Partnership

August 18, 2:00 p.m. – 3:15 p.m.

Jose R. Cardenas, USAID Bureau for Latin America and the Caribbean

William Swope, Intel Corporation

Miguel Brechner, One Laptop Per Child Per Teacher / Plan Ceibal

Dr. Ines Bustillo, Economic Commission for Latin America

Paul Raines, Home Depot

Dr. Jerry Haar, Florida International University

The competitive advantages provided through strategically organized public private partnerships (PPPs) in the region show great potential. However, these alliances are more often focused on infrastructure and physical assets, rather than on human capital. This panel featured a robust discussion on a diverse range of applied case studies, showcasing proven methodologies of successful PPP implementation in the Americas.

Discussion Highlights –

- Latin America is home to more PPPs than any other region in the world.
- PPPs create sustainable alliances that attract international capital inflows, spur productivity gains and expert knowledge development. PPPs merge the strategic vision and technical capacity of international non-profits and the management skills of a private firm.

- PPPs commit to public standards, rely on private sector expertise, and take advantage of community knowledge.

Regional Best Practices –

- One Laptop per Child: Administered by the non-profit One Laptop per Child and the Government of Uruguay, this program has put computers in the hands of every child in the nation. The program trains and prepares children at an early age, equitably distributes technology to children, and gives adults a chance to learn computer skills from their children. Students now want to spend more time in school because of this program.
- Home Depot: The largest home improvement company in Mexico has partnered with local municipalities in areas often hit by extreme weather. Home Depot works in partnership with local law enforcement agencies to be the last business to close before a hurricane and the first to open afterwards. They donate supplies and labor to help rebuild police stations and medical centers, as well as residences in local communities.
- Intel: In Guatemala, there was a shortage of qualified engineers to work at Intel's laboratories. Intel worked in partnership with a local university to develop engineering curriculum to create a labor force for their laboratories. Intel only hires as many graduates as they need, but everyone can take advantage of the program and receive a cutting-edge engineering education.

Lessons Learned –

- PPPs operate best when they have a clearly defined focus. If PPPs try to pursue too many objectives, they often allocate resources inefficiently and are ineffective in achieving their goals or mandates.
- Partnerships with compelling business interests are often more successful than purely philanthropic endeavors.

Academia and Industry as Partners in Innovation

August 19, 11:00 a.m. – 12:15 p.m.

Dr. Deborah Lazard, MSD-México
Lueny Morell, Hewlett-Packard
German Rios, Andean Development Corporation

Private sector funded academic research coupled with adequate vocational training programs are essential to attaining a competitive workforce. How do governments partner with the private sector in this undertaking? This panel focused on the role that partnerships between the business community and academia could play in enhancing economic competitiveness, entrepreneurship, and workforce development. Presenters examined how the most innovative countries have commercialized research through partnerships between universities and the private sector.

Discussion Highlights –

- Technology drives growth and without investment in research and development (which currently amounts to only 0.5% of GDP in Latin America, according to the UN Institute for Statistics) the growth in the region will lag behind growth in other regions, namely Asia.
- Innovative technologies can be transferred to the market and duplicated elsewhere, improving productivity and competitiveness.

Regional Best Practices –

- Colombia: a new program, MERLIN, has been developed to improve shipping logistics for flower producers. With a more efficient production and shipping line, Colombian flower growers can better compete with their Dutch counterparts.
- Venezuela: A project partially funded by CAF, ExporTIC included training and consulting for thirty Venezuela high tech companies on how to commercialize, market, and export their technology. The work included group sessions, individual consulting assignments, and export action plans for each of the companies in the program.

Lessons Learned -

- South and Central America should continue their efforts to improve associations between the academic and private sectors.

Next Steps -

- Convocation of the Second Meeting of Ministers and High Authorities of Science and Technology in Mexico City on October 27 and 28, 2008.

Winning Strategies, Best Practices

August 19, 2:00 p.m. – 3:15 p.m.

Minister Jose Lino Barañao, Argentina
Carlos Mazal, World Intellectual Property Organization

Jose Acosta, UPS

Eduardo Santos, Hewlett-Packard

Dr. Jerry Haar, Florida International University

Partnerships in the Americas among business, government, and academia can boost competitiveness. Panelists showcased successful examples of economic clusters in several regions in the hemisphere. While there are a variety of clusters in the region, the session stimulated a dialogue to share winning strategies, best practices, and lessons learned. When cooperative relationships exist between these three entities, achievements in science and technology can be transformed into practical applications. This symbiotic cycle drives economic growth and can give regions a substantial competitive advantage.

Discussion Highlights -

- Regional clusters allow firms and non-profits to take advantage of locally held knowledge, creating an impetus for the formation of multiple synergistic ventures among the private sector, non-profits, and governmental entities.

Regional Best Practices –

- Brazil: Since 1996, Brazil has implemented numerous intellectual property laws to comply with trade-related aspects of intellectual property rights. Brazil now has a comparatively mature business climate for intellectual property protection, enhancing the nation's competitiveness in the hemisphere.
- MERCOSUR: Science and technology collaborations across member nations have increased information sharing and the dissemination of critical research. Public-private partnerships have especially allowed all member nations to take advantage of

scientific and technological advances in the region.

- Argentina: the Productive Agglomerates Development Project (PI-TEC) finances 80% of the cost of filing for a patent, enhancing the development of science and technology activities.

Lessons Learned –

- Latin America needs greater investment in human capital; Chile is the only Latin American country that ranks in the top 50 in the 2008 Global Competitiveness Report, compiled by the World Economic Forum.

Renewable Energy and Sustainable Resources

The impact of energy on jobs, business, and the economy extends far beyond the energy sector itself. Increases in prices mean that consumers have less to spend on other goods and services. Corporate decisions on where to locate, expand, and create jobs depend significantly on the reliability and affordability of fuel and power. Competitive economies need affordable and reliable energy. Clean, renewable energy would help alleviate energy security dilemmas faced by many nations in the Western Hemisphere. Renewable energy can open up new frontiers for industrial production, commercial interaction, and technological innovation as well as accelerate economic growth.

Securing a Sustainable Water Supply for the Americas

August 18, 11:00 a.m. – 12:15 p.m.

*Rodrigo Calderon, Coca-Cola Company
Jorge Ale Yarad, Aguas Santiago Poniente S.A.
Dr. Polioptro Martinez Austria, Mexican Institute of Water Technology
Claudio A. Pinto, JCA Markets, Inc*

Adequate supplies of fresh water are essential to life, health, and economic development. Given the importance of water to poverty alleviation, and human and ecosystem health, the management of water resources is significant. Incorporating technologies designed to save water results in a reduction of production costs and enhanced competitiveness. Water shortages and poor water management can lead to loss of biodiversity and agricultural production, increased malnutrition and disease, and reduced economic growth-- all of which can lead to social instability and conflict.

Discussion Highlights -

- Water covers about 70 percent of the Earth's surface, but only three percent is fresh water. Currently, 1.1 billion people lack access to safe drinking water, and 2.6 billion lack

adequate sanitation services. By 2025, it is estimated that two-thirds of the world's population could be facing serious water shortages. The world has a finite amount of fresh water, but if managed properly, there is enough to meet personal, agricultural, and industrial needs.

- The price of water needs to reflect the true cost, including economic, environmental, and social costs. While there are sections of the Western Hemisphere that have abundant water resources, large areas of Argentina, Peru, Chile, and other nations are arid or semiarid.
- The economic benefits of improved water supply and sanitation far outweigh the investment costs. Success is not possible without strong leadership and commitment from government, civil society and business leaders. Leaders must set priorities and instigate the reforms necessary to improve institutional performance and attract investment.

Regional Best Practices –

- Coca-Cola is taking action to recycle 100 percent of its bottles and cans in the market. It is working with the World Wildlife Fund to measurably conserve seven of the world's most critical freshwater ecoregions, including the Rio Grande/Rio Bravo and the rivers of the Mesoamerican Caribbean Reef. By the end of 2010, Coca-Cola plans to return all the water that they use for manufacturing processes to the environment at a level that supports aquatic life and agriculture.

Converting Methane to Energy

August 18, 2:00 p.m. – 3:15 p.m.

*Lic. Jorge H. Padilla, SIMEPRODE, Mexico
Jennifer Wilson, CIFAL Atlanta
Lic. Jaime M. Saldana, Sistemas de Energía Internacional, S.A., Mexico
Richard Crump, Caterpillar
Randy Cluff, Canada Composting
Paul M. Gunning, U.S. Environmental Protection Agency*

The Methane to Energy panel highlighted methane recovery as an energy source with positive economic and environmental benefits. Captured methane used for power generation reduces atmospheric methane levels and has contributed to an eleven percent drop in U.S. ambient methane levels since the 1990s.

Discussion Highlights –

- Methane is a greenhouse gas, but it is also a clean energy source. There are numerous untapped opportunities to produce community-based energy through methane captured from agricultural, industrial, commercial, and municipal solid waste, as well as commercial coal mining operations. However, there is a lack of mandated methane capture and use policy at all levels of government throughout the Western Hemisphere.
- Education of society, as a whole, is needed to affect a shift for greater use of all available methane sources.

Regional Best Practices –

- The Monterrey, Mexico landfill gas-to-energy project powers 16,000 homes in Monterrey, public street lights, and the operation of Monterrey’s metro system while eliminating 180,000 metric tons of CO₂ per year. The plant in Monterrey has been in operation since 2003 and was designed and implemented as a Global Environment Facility operation managed by the World Bank. Monterrey offers a good illustration of the impact international cooperation on methane gas can have. In a city of almost 4 million which produces over 4,000 tons of waste daily, the municipal government is poised to meet 80 percent of its electricity needs with energy from landfill gas.
- The Dufferin Organics Processing Facility in Toronto, Canada, converts 40,000 tons a year of municipal solid waste to methane for energy uses and composting. Canada Composting Inc. uses anaerobic digestion to decompose organic wastes to produce biogas which is converted into electrical and thermal

energy. The facility accepted its first organic waste in September 2002. The waste is collected at curbside from residences and businesses, and is part of a City of Toronto source separated organics program.

Renewable Energy Opportunities in the Americas

August 19, 11:00 a.m. – 12:15 p.m.

Alessandro Golombiewski Teixeira, Brazilian Trade and Investment Promotion Agency

Dr. Jay Hakes, U.S. Department of Energy

Dr. Sam Shelton, Georgia Institute of Technology

James Husbands, Barbados Manufacturing Association

Mark Lambrides, Organization of American States

The Renewable Energy Opportunities in the Americas panel highlighted renewable and alternative energy sources, focusing on solar, wind, and biofuels, as keys to greater energy security for the Western Hemisphere as it moves to lessen its dependence on hydrocarbon fuels. Now, more than ever, nations fully recognize the imperative for widespread adoption of renewable energy to promote sustained economic growth, social development and environmental stewardship.

The use of renewable energy not only decreases the intensive use of fossil fuels, but also creates new jobs, revitalizes small and medium size industries, and attracts new investments to expand the energy infrastructure of individual nations. Renewable energy is bringing about a new energy future, one that is cleaner, more sustainable, more affordable, more secure, and less reliant on carbon-based fossil fuels. While there is no “silver bullet” that will solve the world’s energy problems, it is clear that renewable energy and efficiency technologies are an indispensable component of the solution.

Discussion Highlights -

- Highly divergent markets will dictate nations' renewable and alternative energy opportunities. Solar and wind power are intermittent, capital-intensive power sources but they have no fuel costs and very low operating costs. Wind and solar technologies are undergoing rapid change, and the products available today will be vastly different in five to ten years. Competition among technologies can be a good policy driver. That being said, consistent policy commitments, such as tax incentives from all levels of government are needed for these technologies to fully penetrate the market.
- According to the Energy Information Administration (EIA), world marketed energy consumption is projected to increase by 50 percent from 2005 to 2030 (U.S. Department of Energy's International Energy Outlook 2008).
- A growing world population and strong economic growth, particularly in developing countries, will propel energy consumption, and the twin forces of urbanization and industrialization will accelerate this trend.

Regional Best Practices -

- Renewable energy sources like wind, solar, geothermal, hydrogen and biomass have the potential to play an increasingly important role for the Western Hemisphere region. The use of clean, renewable, and efficient energy technologies and services enables improvements in economic and social conditions.
- Solar power is being used to heat water in the Caribbean. It is estimated that the solar water heating industry saves Barbados about US\$6.5 million per year in imported fuel. Currently, about 32,000 solar water heaters are installed in homes, commercial businesses, and hotels in Barbados. The proliferation of solar water heating systems in Barbados resulted from concessions granted by the Ministry of Finance, which enabled manufacturers to import materials duty-free,

and provided consumers with partial or full tax deductions for the cost of the heaters.

- Brazil has a unique leadership position in the emerging global biofuels industry. Its role in developing technologies that allow consumers to switch easily between fossil fuels and biofuels has been revolutionary. In addition, the promise of second-generation technology, particularly commercially viable cellulosic ethanol, will dramatically change the global competitive landscape. Nations capable of innovating will have tremendous advantages, both because the emerging technologies will support their industries and because they will possess a high value-added export.

Travel and Tourism

Travel and tourism is a major contributor to the gross domestic product of many economies in the Americas, and, in several cases, is the leading export, employer, and driver of infrastructure development. Increased tourism activity and traveler behavior have led to a greater focus on maintaining the balance among the economic, environmental and socio-cultural impacts of tourism development. The challenge to governments in the Americas is to identify the appropriate sustainable practices, infrastructure, and policies to support tourism development initiatives.

Sustainable Tourism Development as a Driver of Competitiveness

August 18, 11:00 a.m. – 12:15 p.m.

Dawn Drew, National Geographic Traveler Magazine

Jeff Senior, Fairmont Hotels and Resorts

Joe McInerney, American Hotel and Lodging Association

Damien Shiels, World Bank Group

Strategies for balancing the environmental, social, and economic considerations of tourism development vary by destination and market segment. Leaders from the travel and tourism field spoke about innovative ways travel and tourism industries of the Americas are applying sustainable development principles to strengthen their competitive positions.

Discussion Highlights –

- The environmental and economic impact of the travel and tourism industry cannot be overstated. Stewardship is critical to the continued success of the travel and tourism industry throughout the Americas.
- There are many programs already in place for developing sustainable programs and practices for travel and tourism businesses. Tourism businesses need to identify which program(s) will work best for them; the “one size fits all” approach is inadequate.
- Travel and tourism help alleviate poverty, and innovative programs that connect travelers to

small communities can help sustain the community and its traditions, cultures, and peoples, while simultaneously providing travelers with an authentic experience.

- Travelers around the globe believe that travel and tourism industry businesses have a responsibility to develop and implement sustainable practices, and will make buying decisions based on those practices.

Regional Best Practices –

- The American Hotel & Lodging Association is working to develop initiatives with partner organizations to cover all segments of the industry to provide hotel owners and operators with options to create environmentally-friendly and sustainable hotels. AH&LA’s goal is to ensure that programs identify key green/sustainability issues, best practices, resources, and opportunities in areas such as: energy, water, waste management, construction and design, toxics and cleaning chemicals, paper, air quality, and supply chain/packaging. In addition, they are doing research and documenting case studies and success stories to demonstrate the business case for “going green.”
- National Geographic’s *Traveler* magazine established a “destination immersion” program for travelers who want to experience a potential destination before they actually visit. They are currently working with Mexico and India, bringing the culture, heritage, music, and food of both countries to potential travelers.
- In Mexico, the partnered development of the Bom Dia brand of fair trade coffee and the development of a hands-on tour of the coffee plantation has allowed Mexico to sustain a small community and artisan tradition of coffee-growing that may have otherwise disappeared.
- Fairmont Hotels and the Audubon Society have partnered on water conservation and sustainability programs, which have resulted in cost savings of 10-30 percent per annum for Fairmont golf course maintenance.

Next Steps –

- Governments around the globe should develop sustainable policy guidelines, as have Germany, the United Kingdom and the Netherlands, for instance.
- Businesses catering to destination travelers should do the same, telling customers how they are doing in the sustainable realm, visibly displaying “green” certificates earned, and “green” association memberships held.
- Travelers should continue to travel to destinations that are working hard in the sustainable realm, and should patronize businesses that are doing likewise.

Improving Market Access for Small and Medium Tourism Enterprises

August 18, 2:00 p.m. – 3:15 p.m.

Ronald Sanabria, Rainforest Alliance

Francis Farrell, National Geographic Adventure Magazine

Russell Walters, Adventure Travel Trade Association

Santiago Soler, Inter-American Development Bank

Small and medium enterprises (SMEs) comprise the majority of tourism businesses throughout the Americas. Increasingly, destinations in the region recognize the need to improve consumer awareness of these businesses in order to remain competitive. Experts in tourism development and financing shared best practices on developing SME networks, capacity building, and marketing partnerships.

Discussion Highlights -

- The Multilateral Investment Fund impacts local development, which incorporates local SMEs, communities and inhabitants, and non-tourism service providers of the tourism value chain.
- Establishing partnerships with industry, NGOs, and governmental groups is critical to the success of SMEs throughout the region, particularly as SMEs are one of the top income earners for a significant majority of the countries within the region.

- Businesses will be more competitive if they protect the assets that attract visitors to their destinations, become more resource efficient, improve market exposure, and provide a sound service quality-price balance.
- Unlike large businesses, SMEs see each other as allies rather than competitors, which allows them to collaborate to produce greater value.

Regional Best Practices -

- Ecuador has partnered with the National Geographic’s *Adventure* magazine and the Rainforest Alliance to create and market a program called Pur Ecuador (Pure Ecuador) to highlight Ecuadorian hotels committed to sustainable practices. The program included a website and double-page advertisements in the magazine. This partnership enabled small hotels to participate in an advertising campaign that, under normal circumstances, they would not have been able to afford.
- Upon completion, the Maine Huts and Trails program, supported by partners New Balance Foundation, L.L. Bean, and the Penobscot Indian Nation, will consist of a 180-mile recreation corridor, with up to twelve huts, each designed to accommodate 40 guests. The first section of the trail and first hut opened in 2008. This program is expected to be a significant economic engine in Western Maine and will directly benefit the dozens of SME businesses located in and around the corridor.
- The Multilateral Investment Fund has implemented 24 sustainable projects in 19 countries, which in turn, support more than 6,500 SME businesses around the globe. The impact of these programs supports some of the world’s poorest local populations living near commercially viable tourist attractions; incorporates local SMEs, communities, and inhabitants as service providers in the tourism value chain; increases enterprises’ capacity for locally-owned tourism SMEs by improving integration of various tourism product components; avoids social disruption and preserves the cultural heritage of inhabitants;

and prevents environmental impacts on the region's diverse natural resources.

Next Steps –

- SMEs represent the future of the travel and tourism industry – at least at the middle and upper price points. Educated people are becoming increasingly sophisticated and well-traveled. SMEs are more nimble and can deliver the kind of attention and intimacy these travelers are seeking. Local flavor and authenticity change the way people interact with one another. People-to-people connections are critical to the long-term health of the industry.
- Governments should formulate and implement national and local policy planning guidelines and evaluation frameworks for sustainable tourism development. Working with NGOs and the industry, governments should develop shared sustainability standards and improve both infrastructure and public services. This will ensure that investments in the travel and tourism sector contribute toward conserving biodiversity and community development.
- Governments should help businesses implement sustainable practices, making technical and financial assistance accessible to businesses of all sizes. They should also support sustainable public-private tourism partnerships and voluntary accountability mechanisms, such as independent certifications that include biodiversity protection criteria.
- SMEs should consider attending conferences, such as the Adventure Travel and Trade Association Summits, to interact with other organizations and to further their individual causes.

Marine Ecology & Sustainable Tourism

August 19, 2:00 p.m. – 3:15 p.m.

Lelei LeLaulu, Counterpart International

Michael King, Barbados

Timothy R.E. Keeney, National Oceanic and Atmospheric Administration

Marine conservation efforts in the Caribbean Basin are vital not only to the long-term health of the marine ecosystem, but also to the economic well-being of the Caribbean travel and tourism industry. The panel discussed crucial marine conservation issues, strategies and research to educate citizens and policymakers on the importance of this fragile resource.

Discussion Highlights –

- In the Caribbean, the annual net value of fisheries, dive tourism, and shoreline protection that are directly attributable to healthy coral reefs is estimated to be between \$3.1 and \$4.6 billion.
- Most countries are developing and implementing appropriate coastal zone management policies and guidelines that will provide a competitive advantage for Caribbean tourism products, but more infrastructure is still needed.
- Partnerships between marine biologists and the local communities are critical to educating residents about maintaining healthy coral reefs, quality fishing practices, and local products that ultimately benefit both residents and visitors.

Regional Best Practices –

- There are more than 1,800 Marine Protected Areas (MPAs) in the United States and more than 285 in the Wider Caribbean region, which includes Mexico, Belize, Honduras, and Guatemala. MPAs are a valuable tool to ensure coral reefs and the natural beauty the travel and tourism industry depends on will not disappear. However, enforcement of the laws that protect MPAs is challenging. Some areas are training volunteers to serve as “educators” rather than enforcement officers. These volunteers provide additional “eyes on

the water” that help protect the marine resources.

- The 61st United Nations adopted a resolution toward the sustainable development of the Caribbean Sea for present and future generations. This resolution contains all of the elements to have the Caribbean basin treated as a special zone that would ensure ecological and sustainable viability far into the future.

Next Steps –

- Aquaculture should be used to supplement the need to fish the world’s coral reefs. By establishing aquaculture regulations for federal waters, the U.S. and others will go a long way toward unleashing aquaculture’s potential. It would create jobs and economic growth in many communities, particularly those with a history of being connected to the fishing industry. It would also reduce pressure on already depleted wild fish stocks.
- Policy guidelines for the sustainable development of the Caribbean Sea need to be developed, and enforcement will require collaboration among all of the Caribbean nations and the United States.
- There is now, and will continue to be, a need for Marine Resource Management Specialists, Economists, and Development Specialists. Universities need to support and nurture students to follow these paths of study.
- Hemispheric cooperation is needed to enhance and develop a workable implementation of the global architecture already under discussion at the United Nations.

Trade Logistics

This track highlighted how public and private stakeholders develop and implement policies that improve logistics operations and financing, mitigate supply chain risk to ensure reliable and responsible sourcing, and foster the implementation of environmentally sound best practices. Panelists identified collaboration, affordable and low-technology intensive methods of achieving sustainable supply chains, and workforce development as the top priorities for improving the competitiveness of value chains in the Western Hemisphere.

Greening the Supply Chain

August 18, 11:00 a.m. – 12:15 p.m.

Jack W. Boisen, Continental Airlines Cargo

Rick Parker, Wal-Mart Stores

Jay Brickman, Crowley Maritime Corporation

Ray Schorsch, CEMEX

Dr. Steve Walton, Emory University

The “Greening the Supply Chain” panel acknowledged a shift in the goal orientation of energy efficiency and waste reduction from just cost efficiencies to environmental stewardship.

Discussion Highlights -

- Participants discussed the most advanced energy efficient technologies such as natural gas tankers to low-capital intensive methodologies such as strategic window placement in distribution facilities.
- Representatives from leading transportation and logistics firms also stressed the need for collaboration within the industry, notably increased utilization of intermodal alternatives.

Regional Best Practices –

- Wal-Mart stores stressed the need for sustained commitment behind strong leadership to effectively implement “green” initiatives. For example, Wal-Mart has fitted its U.S. truck fleet with auxiliary power units, new tire specifications, and aerodynamic side panels that have increased efficiency by over

30 percent and resulted in cost savings of over two percent. In terms of low-capital intensive “green” approaches, Wal-Mart has strategically placed windows on the side of their San Jose, Costa Rica, distribution facility to decrease electricity costs by utilizing sun light.

- CEMEX, one of the largest logistics operators in Latin America, is using some of the most advanced technologies to develop unique approaches to green initiatives. For example, SmartSilo is an innovative service for efficiently managing CEMEX customers’ bulk materials supply via remote monitoring and automatic replenishment. This technology not only provides CEMEX’s fleet with more flexibility and responsiveness, but it decreases congestion traffic during peak hours and results in cost savings. Nearly 40 percent of all CEMEX yearly loads will be delivered during off peak hours, which has allowed CEMEX to decrease fleet size and minimize fuel consumption—also resulting in ten percent less emissions of carbon dioxide and other particulate emissions.
- Crowley Maritime has invested over \$1 billion in new green initiatives to increase energy efficiency and to mitigate the negative environmental externalities on the trade corridor from the Southeastern United States to Puerto Rico and the Caribbean. Crowley, as a common carrier, has invested in natural gas and low-sulfur content fuel tankers—these are expected to decrease particulate emissions by 44 percent and decrease visible exhaust smoke by almost 75 percent. Crowley is also using low-capital intensive methodologies, such as increasing the amount of electronic data interchange (EDI) to 90 percent of communication within the company, while reducing paper usage by millions of sheets.

Operating and Financing Efficient Cross Border Supply Chains

August 18, 2:00 p.m. – 3:15 p.m.

Carolina Roca Ruano, Guatemala

Mauricio Mesquita Moreira, Inter-American Development Bank

Jose Acosta, UPS

Manuel Aragon, Teqflor International Logistics

This panel acknowledged that Western Hemisphere governments must improve the efficiency of trade facilitation to address growing competition from intra-Asia and inter-Asian supply chains.

Discussion Highlights—

- Panelists stressed the need to understand the effect of both time and cost within the transportation of goods across borders—costs born of delays can almost double total transportation costs.
- In addition, public sector panelists emphasized the importance of public-private cooperation to effectively oversee supply chain security in light of new global security threats.

Regional Best Practices –

- United Parcel Service (UPS) is increasingly using their supply chain finance unit, UPS Capital, to enable delivery of the physical goods along with the financial services needed to finance those goods in transit. UPS uses its expertise in logistics and trade finance to act as a supply chain “translator”—essentially bridging a critical information divide between physical and financial value chains. UPS is successfully using its UPS Capital unit to provide critical analysis about the information collected from the supply chain to synchronize and optimize trade flows.
- Carolina Roca, formerly of Guatemala SAT (Customs), has implemented dramatic reforms in human resources management, customs infrastructure, processes and IT management, strategic alliances, and overall supply chain/customs security—through the

“El Camino Transparente a la Excelencia” program. Specifically, SAT has been very effective in reorienting the training procedures to develop strong core competencies of specializations for all customs workers as well as implemented an integrated electronic manifest and electronic import declaration (DUA-GT) system. As a result, more private sector operators are willing to cooperate with SAT; SAT has been generating more revenue while improving competitiveness—as noted in the World Economic Forum’s Global Enabling Trade Report 2008, which Guatemala ranks 4th in Latin America and the Caribbean in terms of customs efficiency.

- Mauricio Mesquita Moreira of the Inter-American Development Bank (IADB) has quantified the impact of transport costs on the total cost of trade in Latin America, which has exceeded the cost impact of traditional tariffs in the total cost of trade. For most sectors and markets in Latin America, transport costs are significantly higher than tariffs; as a result, reductions in freight costs can have a more significant impact than tariff liberalization on the volume and diversification of Latin American exports. The IADB has identified port inefficiencies and low competition among shippers as two of the most significant determinants of Latin America’s poor competitive position in terms of transport costs—effectively shifting national and regional priorities to improving these determinants rather than focusing on tariff liberalization.

Ensuring Reliable and Responsible Sourcing

August 19, 11:00 a.m. – 12:15 p.m.
Ellen Smith, Jockey International
Juan Gonzalo Flores, IFC Office for Advisory Services in Latin America and the Caribbean
T. James Min II, DHL Express
Richard Feinberg, University of California at San Diego
Dr. Steve Walton, Emory University

This panel acknowledged the importance of corporate governance, proper oversight, and income generating opportunities for suppliers in developing economies.

Discussion Highlights—

- Panelists connected a healthy and well paid workforce and other responsible business practices with increased productivity and reliability, as well as the effect of guaranteed and protected income generating opportunities for small suppliers to create new market opportunities.
- Leading multinational corporations called upon customers to drive these ethical business practices through consumer demand.

Regional Best Practices—

- Dr. Richard Feinberg of the University of California-San Diego has discovered a positive relationship between responsible business practices, higher wages, and internal productivity and increased exports in Latin America. Dr. Feinberg has facilitated strong free trade zone administrations, national administrations, G-8 countries, and large multinational brands in down streaming these practices to receive the intended benefits. For example, El Salvador has invested over \$7 million to provide for 160 national inspectors to audit labor standards. Dr. Feinberg has facilitated great successes with large industrial exporters in developing economies throughout Latin America, but small sub-contractors of these exporters must be involved in the responsible business process

to maximize benefits to trade and productivity.

- DHL has developed a Disaster Response Team comprised of 80 DHL employees based in South Florida to manage logistics and freight movements and to deliver much needed aid in disaster affected areas throughout Latin America. In 2007, DHL partnered with Operation Blessing International to deliver and install two water purification systems as well as to donate materials to maintain essential infrastructure services to both DHL's employees' families and communities, in addition to DHL's customers. DHL has improved community relations and their corporate image and is beginning to realize growing market opportunities as a result. However, DHL insists that responsible business practices and the resulting increased productivity can only be driven by consumer demand, which is not yet apparent.
- Jockey International has implemented community health programs, mandatory physical labor breaks at the workplace, and a complex labor standard certification system for their suppliers throughout Latin America to improve productivity and achieve a high level of responsibility in all business processes. For example, Jockey plant managers were able to help Costa Rican schools treat a rampant stomach ailment affecting Jockey's employees' children, which was preventing Jockey's employees from arriving to work on time and maintaining minimum levels of productivity. As a result of these high quality standards, Jockey has increased productivity up to 90-95 percent throughout their Latin America operations.

Lessons Learned—

- Panelists identified collaboration, affordable and low-technology intensive methods of achieving sustainable supply chains, and workforce development as the top priorities for improving the competitiveness of value chains in the Western Hemisphere. In addition, the trade logistics panel helped to identify goals for labor and responsible business standards that ultimately increase

exports and improve diversification while improving productivity simultaneously. Representatives, especially from the transportation and logistics industry, stressed the need for strong leadership and perseverance. Moreover, industry representatives emphasized the importance of consumer demand as the most essential driver of change—corporate leaders cannot effectively take action if it is not in the interest of satisfying consumer demand. While industry representatives were more focused on the means to attain certain milestones within the trade logistics industry, public sector participants attempted to reframe the debate on trade facilitation. Academia and international organizations are now focused on identifying the true determinants of how effective a country is at moving goods across borders—a change from the noticeable emphasis that the trade community places on tariff liberalization. Transport costs and customs inefficiencies are two important priorities public sector participants have identified for the Latin American region to improve trade facilitation. More broadly speaking, the public sector and private sector both recognized cooperation between the two is absolutely necessary to achieve goals set out for either sector. Collaboration, both industry wide and between federal and municipal agencies, is the most important lesson learned by the Latin America transportation and logistics industry.

infrastructure policy in order to improve the competitiveness of U.S. services exports and promote prosperity throughout the many industries involved in moving goods domestically and across borders. Sustainable supply chain management and public-private sector partnerships are two important themes that this forum will build from discussions held at the ACF. In addition, ITA, in partnership with the World Customs Organization, is developing customs capacity building programs to promote the implementation of importer/exporter compliance systems to improve supply chain security. The ACF discussion on the importance of improving customs core competencies inspired this project executed through the Total Economic Engagement (TEE) program from ITA. Ms. Carolina Roca will partner with ITA to engage Central American and Caribbean customs administrations to work cooperatively with private sector exporters/importers to create compliance systems that improve security and decrease the fiscal burden on national governments.

Next Steps—

- The International Trade Administration is organizing an October 2008 forum of supply chain, transportation, and distribution experts to develop a strategic and long term view of what cross border supply chains, domestic freight movements, Information and Communication Technology systems, and most importantly physical infrastructure and infrastructure services will look like in 10-20 years. This forum will build off topics discussed at the ACF and is intended to guide the next administration's transportation and

Other Topics

Angel Investing

August 18, 2:00 p.m. – 3:15 p.m.

*Elizabeth O'Halloran, University of Virginia
Knox Massey, Atlanta Technology Angels
Diego May, LINK Inversiones, Costa Rica
Antonio Botelho, Pontificia Universidade Católica
do Rio de Janeiro
John May, Angel Capital Association
Peter Rodriguez, University of Virginia*

This panel of five regional subject experts discussed the recent development of business angel investing as an important source of financing for early-stage companies in Latin America. Angel investors, high net worth individuals who provide capital and expertise to entrepreneurs, invest in companies that have grown beyond what friends and family can invest, but who still do not fit the reduced risk profile of institutional venture capital investors. The panel compared the successes and failures of groups in the U.S. to emerging Latin American group activity and provided information on best practices to individuals and institutions interested in forming angel groups.

Discussion Highlights -

- Angel investments are increasingly important for early stage growth companies because global credit conditions are weak and the availability of traditional sources of capital is tight and getting tighter.
- The rule of law provides a foundation for all angel investing and therefore must be strong, fair, enforced, and transparent.

Regional Best Practices –

- Individuals gain from their involvement as “angels.” In Brazil, angel investors have seen a 3000 percent return on investment.

Lessons Learned -

- In the United States, angel investors invest approximately the same amount as institutional venture capital investors. Angel investments and institutional investments each account for approximately \$28 billion in U.S. early stage companies each year, according to panelist John May.

Next Steps -

- The Brazilian government will hold an angel investing workshop on December 3, 2008,
- The Chilean government will likely hold an angel investments panel at the 2009 Americas Competitiveness Forum.
- At the 2008 ACF, a regional ad-hoc sub-group was formed between various Caribbean participants along with the representative of Costa Rica and the Multilateral Investment Fund to further look at cooperative efforts in organizing angel networks.

Venture Capital

August 19, 11:00 a.m. – 12:15 p.m.

*Erik Carlberg, ALTA Growth Capital, Mexico
Rodolfo Oppenheimer, Prosperitas, Uruguay
Diego May, LINK Inversiones, Costa Rica
Susana Garcia Robles, Inter-American
Development Bank
Sidney Chameh, DGF Investments
Cate Ambrose, Latin American Venture Capital
Association*

This panel featured some of Latin America's most seasoned and successful venture capital fund managers and investors. Panelists shared their first-hand experience in cultivating entrepreneurship and nurturing opportunities for investment, from angel and seed investing all the way through the continuum of capital formation for early stage growth enterprises. A key discussion theme was the ecosystem for investment, including the impact of public policy and the role of local and multinational organizations in fostering venture capital across Latin America. A constant theme throughout the panel was the important role played by the

Multilateral Investment Fund in developing the venture capital sector across Latin America.

Discussion Highlights –

- Reliable data is necessary to share success stories and to attract foreign investment into the region’s emerging venture capital funds.
- The investment environment in U.S. states is similar to that in Latin America, where early stage investors face similar difficulties with regard to developing early stage financing, as rule of law is one of the few support mechanisms for angel investing.

Regional Best Practices –

- The Multilateral Investment Fund has operated for 14 years supporting venture development in Latin America, and it ultimately hopes to become obsolete as new business ventures attract institutional investment.

Lessons Learned –

- Governments must ease investment barriers in order to stimulate further venture investing in the region.

Supporting a Healthy Workforce in Emerging Markets

August 18, 11:00 a.m. – 12:15 p.m.

Chris Singer, Pharmaceutical Research and Manufacturers of America

Dr. Dennis C. Liotta, Emory University

Dr. Gary Gereffi, Duke University

A healthy population is not a result of competitiveness, but a necessary prerequisite to building a competitive society. This panel highlighted public and private programs dedicated to ensuring access to medicine throughout the hemisphere. The private sector, including the pharmaceutical industry, has a number of programs dedicated to helping ensure healthy populations in the developing world, which, when

partnered with the government, can produce outstanding results for improved competitiveness.

Discussion Highlights –

- Healthcare must be improved to improve competitiveness. Currently, this is difficult for developing nations, as investing in healthcare is a long term priority and requires economic foresight. Currently for developing nations, the lack of healthcare is a barrier to productivity, and like education, is necessary for a successful economic future. By partnering with academia and industry, governments of developing nations can streamline development and improve the health of the population.

Regional Best Practices –

- Merck, a pharmaceutical company, has created advocacy groups in Central America and Colombia, including a project to bring together government leaders to raise awareness and develop sustainable solutions. Merck has also created a CD to give to journalists on how to report about HIV/AIDS, as well as how to explain the developments towards combating the disease.

THE FUTURE: WHAT'S NEXT?

The Second Americas Competitiveness Forum (ACF 2008) demonstrated that the enthusiasm generated from the inaugural forum has remained strong. The participating countries' understanding and commitment to the mutually beneficial goals of economic prosperity and sustainability through innovation, opportunity, and strategic partnering has continued to deepen. There are three main conclusions that summarize the future direction of the ACF.

First, the results of the ACF Competitiveness Perception Survey support the findings of numerous studies and reports on the region. However, while respondents' views on the biggest impediments to competitiveness were in line with the results, the key question for future discussion is: Are we effectively addressing those challenges with committed resources and the implementation of improved organizational infrastructure that enables individual countries to adopt the best practices and methodologies highlighted at the ACF?

Second, a number of ACF speakers emphasized the important role that local governments play in enhancing a country's overall competitiveness. ACF participants advocated for increased cooperation and communication between government officials at the federal and municipal levels.

Third, the ACF format provides unique interaction between all sectors of society, including government, private sector, academic, and non-government organizations. Strategic alliances that collectively engage these stakeholders are key to strengthening our ability to compete. We saw through the best practices presented during the Forum that public-private partnerships can be very successful.

The inaugural ACF spawned a number of events focused on regional and subregional competitiveness, such as the Americas Innovation Forum (Uruguay, 2008) and the Central American Competitiveness Meeting (Nicaragua, 2008). A number of existing fora also incorporated the issue of competitiveness into their agendas. In conclusion, it is important that the individual sectors continue the cross-pollination inspired by the ACF.

ACF 2009 is scheduled to take place in Santiago, Chile. Additional information can be found at www.trade.gov/competitiveness/acf.

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Tatiana Posada
Taylor Brown
Terry Ainsworth
Todd Gerken
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Tom Strauss
William Ashcraft

The authors of this document include ACF Program and Operations staff, in consultation with panel moderators and ACF partners. Our goal is to illuminate the achievements made at the ACF, and encourage further accomplishments in the hemisphere.

APPENDIX 1: ACF AGENDA

SUNDAY, AUGUST 17

5:30-6:00 p.m.

Pavilion of the Americas

Pre-Reception: Building Learning Communities

- Alan November, Senior Partner, November Learning

6:00 - 8:00 p.m.

Pavilion of the Americas

Welcome Reception

- Alexander A. Mejia, President and Executive Director, CIFAL Atlanta
- Carlos M. Gutierrez, Secretary of Commerce, United States
- Gregory Meeks, U.S. Congressman, New York

MONDAY, AUGUST 18

8:30 - 9:00 a.m.

Centennial Ballroom

Opening Plenary: Welcome to the ACF 2008

- Shirley Franklin, Mayor, City of Atlanta
- Carlos M. Gutierrez, Secretary of Commerce, United States

Master of Ceremonies:

- Christopher Padilla, Under Secretary of Commerce for International Trade, United States

9:00 – 9:45 a.m.

Centennial Ballroom

Plenary Panel: The Americas' Global Image: A Media Perspective

- Daniel Fernandez Canedo, Editor-in-Chief, Clarin Newspaper and Anchorman, Radio America's "21st Century Economy"
- Maria Elvira Salazar, Host, Maria Elvira Live, Mega TV
- Sergio Sarmiento, Journalist/Anchor, Reforma, TV Azteca

Moderated by:

- Alberto Padilla, Anchor, CNN en Español

9:45 - 11:00 a.m.

Centennial Ballroom

Plenary Panel: Competitiveness in the Americas: Government Leaders' Perspective

- His Excellency Alvaro Colom Caballeros, President of the Republic of Guatemala
- His Excellency Elias Antonio Saca Gonzalez, President of the Republic of El Salvador
- His Excellency Alvaro Uribe Velez, President of the Republic of Colombia

Moderated by:

- Carlos M. Gutierrez, Secretary of Commerce, United States

Introductory Remarks by:

- Enrique Garcia, President and Chief Executive Officer, Andean Development Corporation

11:00 a.m. - 12:15 p.m.

Breakout Discussions

TRADE LOGISTICS 1: GREENING THE SUPPLY CHAIN

- Jack W. Boisen, Vice President of Cargo, Continental Airlines Cargo
- Rick Parker, Senior Director for International Logistics, Wal-Mart Stores
- Jay Brickman, Vice President of Government Services, Crowley Maritime Corporation
- Ray Schorsch, President, Atlantic Region, CEMEX

Moderated by:

- Dr. Steve Walton, Interim Associate Dean of Full-Time MBA Programs, Goizueta Business School, Emory University

TRAVEL & TOURISM 1: SUSTAINABLE TOURISM DEVELOPMENT AS A DRIVER OF COMPETITIVENESS

- Dawn Drew, Vice President and Publisher, National Geographic Traveler Magazine
- Jeff Senior, Vice President of Marketing and Sales, Fairmont Hotels and Resorts
- Joe McInerney, President and Chief Executive Officer, American Hotel and Lodging Association

Moderated by:

- Damien Shiels, Senior Investment Promotion Officer, Latin America and Caribbean, Foreign Investment Advisory Service (FIAS) World Bank Group

ALLIANCES IN BUSINESS & EDUCATION 1: THE ROLE OF COMPETITIVENESS COUNCILS IN PROMOTING COMPETITIVENESS

- Dr. Roberto Newell Garcia, Chief Executive Officer, Mexican Institute for Competitiveness
- Claudio Gastal, General Director, Movimento Brasil Competitivo
- Hernando Jose Gomez Restrepo, President, Consejo Privado de Competitividad, Colombia
- Antonio Rodriguez Mansfield, Competitiveness National Council, Dominican Republic

Moderated by:

- Deborah L. Wince-Smith, President and Chief Executive Officer, U.S. Council on Competitiveness

RENEWABLE ENERGY 1: SECURING A SUSTAINABLE WATER SUPPLY FOR THE AMERICAS

- Rodrigo Calderon, Vice President and Director of Public Affairs and Communications, Latin America, The Coca-Cola Company
- Jorge Ale Yarad, General Manager, Aguas Santiago Poniente S.A., Chile
- Dr. Polioptro Martinez Austria, General Director, Mexican Institute of Water Technology, Mexico

Moderated by:

- Claudio A. Pinto, Partner, Market Development, JCA Markets Inc

OTHER TOPICS 1: SUPPORTING A HEALTHY WORKFORCE IN EMERGING MARKETS

- Chris Singer, Chief Operating Officer, Pharmaceutical Research and Manufacturers of America
- Dr. Dennis C. Liotta, Samuel Candler Dobbs Professor of Chemistry, Emory University

Moderated by:

- Dr. Gary Gereffi, Professor of Sociology and Director, Center on Globalization, Governance and Competitiveness, Duke University

REGIONAL MARKET OPPORTUNITIES: NAFTA

- Jorge Lopez, Director General, International Promotion, PROMEXICO
- Israel Hernandez, Assistant Secretary for Trade Promotion and Director General of the U.S. and Foreign Commercial Service, U.S. Department of Commerce
- Andrew Shisko, Minister Counselor of Commercial Affairs, Canadian Embassy, United States

Moderated by:

- Adrean Rothkopf, Vice President, Western Hemisphere Affairs, U.S. Chamber of Commerce and Executive Vice-President, AACCLA

12:30 - 2:00 p.m.

Centennial Ballroom

Keynote Luncheon Address

- Eduardo Castro Wright, President and Chief Executive Officer, Wal-Mart Stores, U.S.A.
- Ray C. Anderson, Founder, Chairman, and Chief Executive Officer, Interface, Inc.

Introduction by:

- Christopher Crommett, General Manager and Senior Vice President, CNN en Español

2:00 - 3:15 p.m.

Breakout Discussions

TRADE LOGISTICS 2: OPERATING & FINANCING EFFICIENT CROSS-BORDER SUPPLY CHAINS

- Carolina Roca Ruano, Former Superintendent of Tax Administration, Guatemala
- Mauricio Mesquita Moreira, Senior Trade Economist, Inter-American Development Bank
- Jose Acosta, Vice President, Operations, Americas Region, UPS

Moderated by:

- Manuel Aragon, Managing Director, Teqflor International Logistics, LLC

TRAVEL & TOURISM 2: IMPROVING MARKET ACCESS FOR SMALL AND MEDIUM TOURISM ENTERPRISES

- Ronald Sanabria, Sustainable Tourism Director, Rainforest Alliance
- Francis Farrell, Publisher, National Geographic Adventure
- Russell Walters Advisory Board Member, Adventure Travel Trade Association and President, Northern Outdoors

Moderated by:

- Santiago Soler, Regional Specialist, Inter-American Development Bank, Multi-Lateral Investment Fund

ALLIANCES IN BUSINESS & EDUCATION 2: CHARACTERISTICS OF A SUCCESSFUL PUBLIC PRIVATE PARTNERSHIP (PPP)

- Jose R. Cardenas, Acting Assistant Administrator, Bureau for Latin America and the Caribbean, USAID
- William Swope, Vice President and General Manager, Corporate Affairs, Intel Corporation

- Miguel Brechner, Chairman, One Laptop Per Child Per Teacher / Plan Ceibal, Uruguay
- Dr. Ines Bustillo, Washington Office Director, Economic Commission for Latin America
- Paul Raines, Executive Vice President, The Home Depot

Moderated by:

- Dr. Jerry Haar, Associate Dean and Professor, College of Business Administration, Florida International University

RENEWABLE ENERGY 2: CONVERTING METHANE INTO ENERGY

- Lic. Jorge H. Padilla, General Director, SIMEPRODE, Mexico
- Jennifer Wilson, Program Director, Environmental Sustainability, CIFAL Atlanta
- Lic. Jaime M. Saldana, Renewable Energy Division, Assistant Director, Sistemas de Energía Internacional, S.A., Mexico
- Richard Crump, Director, Electric Power Business Development, Caterpillar
- Randy Cluff, Business Development Manager, Canada Composting, Canada

Moderated by:

- Paul M. Gunning, Chief, Non-CO2 Programs Branch, U.S. Environmental Protection Agency

OTHER TOPICS 2: ANGEL INVESTING PANEL

- Elizabeth O'Halloran, Managing Director and Director of Intellectual Capital, Batten Institute, Darden School of Business, University of Virginia
- Knox Massey, Executive Director, Atlanta Technology Angels
- Diego May, Founding Member, LINK Inversiones, Costa Rica

- Antonio Botelho, Assistant Professor, Pontifícia Universidade Católica do Rio de Janeiro
- John May, Chair Emeritus, Angel Capital Association

Moderated by:

- Peter Rodriguez, Associate Professor of Business Administration, Darden School of Business, University of Virginia

REGIONAL MARKET OPPORTUNITIES: CENTRAL AMERICA

- Emmanuel Hess, General Manager, Procomer, Costa Rica

- Romulo Caballeros Otero, Minister of Economy, Guatemala

- Fredis Alonso Cerrato, Minister of Industry and Commerce, Honduras

- Javier Chamorro, Executive Director, ProNicaragua

- Severo Sousa, Vice Minister, Foreign Trade, Panama

- Ricardo Esmahan D'Aubuisson, Minister of Economy, El Salvador

Moderated by:

- Carlos J. Valderrama, Director, Latin America, Musick Peeler and Garrett, LLP

3:30 - 4:30 p.m.

Centennial Ballroom

Plenary Panel: Local Economic Competitiveness: Mayors' Perspective

- Celso Jaque, Former Mayor and Current Governor of Mendoza, Argentina
- Julio Pereyra, President, Latin American Federation of Cities and Municipalities
- Desmond McKenzie, Mayor of Kingston, Jamaica

Moderated by:

- Shirley Franklin, Mayor, City of Atlanta
- Alexander A. Mejia, President and Executive Director, CIFAL Atlanta

This session will be conducted in English and Spanish.

4:30 - 5:30 p.m.

Centennial Ballroom

Plenary Panel: The Trillion Dollar Solution: Facilitating Trade in an Uncertain World

- Jim Balsillie, Co-Chief Executive Officer Research In Motion
- Jim Prentice, Minister of Industry, Canada
- Beatriz Leycegui Gardoqui, Undersecretary for International Trade Negotiations, Ministry of Economy, Mexico

Moderated by:

- Israel Hernandez, Assistant Secretary for Trade Promotion and Director General of the U.S. and Foreign Commercial Service, U.S. Department of Commerce

7:00 - 9:00 p.m.

Georgia Aquarium

Official Dinner

- Ed Bastian, President and Chief Financial Officer, Delta Air Lines
- Ralph de la Vega, President and Chief Executive Officer, AT&T

Keynote Speaker:

- Enrique Garcia, President and Chief Executive Officer, Andean Development Corporation

Presentation of Awards

- Alexander A. Mejia, President and Executive Director, CIFAL Atlanta

TUESDAY, AUGUST 19

8:30 - 9:45 a.m.

Centennial Ballroom

Plenary Panel: TRAVEL & TOURISM: Strategies for Tourism Diversification

- Mercedes Araoz, Minister of Foreign Trade and Tourism, Peru
- Rodolfo Elizondo Torres, Secretary of Tourism, Mexico
- Luis Guillermo Plata Paez, Minister of Trade, Industry, and Tourism, Colombia

Moderated by:

- Allen M. Chastanet, Minister of Tourism and Aviation, St. Lucia

Master of Ceremonies:

- Israel Hernandez, Assistant Secretary for Trade Promotion and Director General of the U.S. and Foreign Commercial Service

9:45 a.m.–10:00 a.m.

Centennial Ballroom

Plenary Keynote: Outlook for Energy: A View to 2030

- Dr. Neal R. Goins, President, ExxonMobil Ventures Mexico, Inc.

10:00 a.m. - 10:45 a.m.

Centennial Ballroom

Plenary Presentation: Innovation at the Intersection of Cultures and Disciplines

- Frans Johansson, Author, *The Medici Effect: Breakthrough Insights at the Intersection of Ideas, Concepts, and Cultures*

11:00 a.m. - 12:15 p.m.

Breakout Discussions

TRADE LOGISTICS 3: ENSURING RELIABLE AND RESPONSIBLE SOURCING

- Ellen Smith, Compliance Counsel, Jockey International
 - Juan Gonzalo Flores, Program Manager, SVC Pillar, IFC Office for Advisory Services in Latin America and the Caribbean
 - T. James Min II, Vice President, International Trade Affairs and Compliance, DHL Express
 - Richard Feinberg, Professor of International Economics, University of California at San Diego
- Moderated by:

- Dr. Steve Walton, Interim Associate Dean of Full-Time MBA Programs, Goizueta Business School, Emory University

ALLIANCES IN BUSINESS & EDUCATION 3: PARTNERS IN ENTREPRENEURSHIP & INNOVATION

- Dr. Deborah Lazard, Director of Innovation Networking, MSD-México

- Lueny Morell, Director, University Relations Latin America, Hewlett-Packard
 - German Rios, Director, Competitive Support Program, Andean Development Corporation
- Moderated by:

- Amb. Alfonso Quinonez, Executive Secretary for Integral Development and Director General of the Inter-American Agency for Cooperation and Development, OAS

TEXTILES & APPAREL: THE FUTURE OF WESTERN HEMISPHERE SOURCING AND SUPPLY CHAIN STRATEGIES

- David Spooner, Assistant Secretary for Import Administration, U.S. Department of Commerce
- Beatriz Leycegui Gardoqui, Undersecretary for International Trade Negotiations, Ministry of Economy of Mexico
- James (Jerry) Cook, Vice President of Government and Trade Relations, Hanesbrands Inc.

Moderated by:

- R. Matthew Priest, Deputy Assistant Secretary for Textiles and Apparel, U.S. Department of Commerce

RENEWABLE ENERGY 3: OPPORTUNITIES IN THE AMERICAS

- Alessandro Golombiewski Teixeira, President, Brazilian Trade and Investment Promotion Agency, Brazil
- Dr. Jay Hakes, Former Director, Energy Information Administration, U.S. Department of Energy
- Dr. Sam Shelton, Director of Research Programs, Georgia Institute of Technology
- James Husbands, President, Barbados Manufacturing Association, Barbados

Moderated by:

- Mark Lambrides, Division Chief, Renewable Energy and Climate Change Division, Organization of American States

OTHER TOPICS 3: VENTURE CAPITAL PANEL

- Erik Carlberg, Managing Director, ALTA Growth Capital, Mexico

12:30 - 2:00 p.m.

Centennial Ballroom

Keynote Luncheon Address

- Sandy Baruah, Acting Administrator, Small Business Administration
- Ralph R. Peterson, Chairman and Chief Executive Officer, CH2M Hill

Introduction by:

- Antonio Delgado, Editor, AmericaEconomia, Miami

2:00 - 3:15 p.m.

Breakout Discussions

TRAVEL & TOURISM 3: MARINE ECOLOGY & SUSTAINABLE TOURISM

- Lelei LeLaulu, President and Chief Executive Officer, Counterpart International
- Michael King, Ambassador to the United States, Barbados

Moderated by:

- Timothy R.E. Keeney, Deputy Assistant Secretary for Oceans and Atmosphere, National Oceanic and Atmospheric Administration

- Rodolfo Oppenheimer, Senior Partner, Prosperitas, Uruguay
- Diego May, Founding Member, LINK Inversiones, Costa Rica
- Susana Garcia Robles, Senior Investment Officer, Multilateral Investment Fund, Inter-American Development Bank
- Sidney Chameh, Founding Partner, DGF Investments

Moderated by:

- Cate Ambrose, Executive Director, Latin American Venture Capital Association

REGIONAL MARKET OPPORTUNITIES: SOUTHERN CONE

- Dr. Beatriz Nofal, President, PROSPERAR, Argentina
- Reginaldo Arcuri, President, Brazilian Agency for Industrial Development, Brazil
- Orlando Jimenez, Head, Innovation Division, Ministry of Economy, Chile
- Daniel Martinez, Minister of Industry, Energy and Mining, Uruguay

Moderated by:

- Anthony Wayne, U.S. Ambassador to Argentina

OTHER TOPICS 4: SMALL AND MEDIUM ENTERPRISE TRADE CAPACITY BUILDING

- Cristina Orellana, Gerente General, Servicio de Cooperación Técnica, Chile
- Rosario Valencia Castillo, Director General, Mexican Association of Small Business Development Centers
- Michael Apel, Senior Trust Fund and Technical Assistance Officer, Inter-American Investment Corporation

- Rick Martin, Acting Director, International Trade Center, Georgia Small Business Development Center Network
- Moderated by:
- Jovita Carranza, Deputy Administrator, U.S. Small Business Administration

ALLIANCES IN BUSINESS AND EDUCATION 4: Partnerships for Competitiveness: Winning Strategies, Best Practices

- Jose Lino Barañao, Minister of Science, Technology and Production, Argentina
 - Carlos Mazal, Sr. Counsellor, World Intellectual Property Organization
 - Jose Acosta, Vice President, Operations, Americas Region, UPS
 - Eduardo Santos, Hewlett-Packard
- Moderated by:
- Dr. Jerry Haar, Associate Dean and Professor, College of Business Administration, Florida International University

REGIONAL MARKET OPPORTUNITIES: CARIBBEAN

3:30 - 4:15 p.m.

Centennial Ballroom

Plenary Session: Enhancing Competitiveness in the Americas – Perspectives from the Hemisphere

- Thomas A. Shannon, Jr., Assistant Secretary of State for Western Hemisphere Affairs, United States
- His Excellency Jaime Morales Carazo, Vice President of the Republic of Nicaragua
- Alejandro Char Chaljub, Mayor of Barranquilla, Colombia

Moderated by:

- Hector Morales, U.S. Ambassador, Organization of American States

4:15-4:30 p.m.

Centennial Ballroom

Plenary Keynote Presentation:

- Paul Bell, President, Americas, Dell, Inc.

4:30-4:45 p.m.

Centennial Ballroom

Plenary Keynote Presentation:

- Sonny Perdue, Governor, State of Georgia

Introduced by:

- Craig Lesser, Former Commissioner of the Georgia Department of Economic Development

- Allen Chastanet, Minister of Tourism, St. Lucia
 - Miguel Calzada Leon, Ambassador-at-Large, Foreign Affairs Ministry, Dominican Republic
 - Bartolome Gamundi Cestero, Secretary of Economic Development and Commerce, Commonwealth of Puerto Rico
 - Her Excellency Glenda Morean Phillip, Ambassador to the United States and Mexico, Permanent Representative to the Organization of American States, Trinidad and Tobago
- Moderated by:
- Anton Edmunds, Executive Director, CCAA

REGIONAL MARKET OPPORTUNITIES: ANDEAN

- Luiz Guillermo Plata Paez, Minister of Trade, Industry, and Tourism, Colombia
- Susana Cabeza de Vaca, Minister of Production, Ecuador
- Mercedes Araoz, Minister of Foreign Trade and Tourism, Peru

Moderated by:

- Ambassador Lino Gutierrez, Special Advisor to the Secretary of Commerce, U.S. Department of Commerce

4:45 - 5:30 p.m.

Centennial Ballroom

ACF 2008 Closing Ceremony

- Carlos M. Gutierrez, Secretary of Commerce, United States
- Shirley Franklin, Mayor, City of Atlanta
- Hugo Lavados, Minister of Economy, Chile

6:30 - 8:00 p.m.

Federal Reserve Bank of Atlanta

Closing Reception

- Ben DeCosta, General Manager, Hartsfield-Jackson International Airport
- Dr. David E. Altig, Senior Vice President, Federal Reserve Bank of Atlanta

APPENDIX 2: ACF COMPETITIVENESS SURVEY RESULTS

1. Please indicate which sector you represent:	Responses	Percentage
<i>Government</i>	35	52%
<i>Business/Private</i>	29	43%
<i>NGO</i>	2	3%
<i>Other</i>	1	1%

2. Please indicate which region you represent:	Responses	Percentage
<i>Central America and Panama</i>	7	10%
<i>Caribbean</i>	5	7%
<i>South America</i>	11	16%
<i>North America</i>	43	64%
<i>Other</i>	1	1%

3. How competitive do you believe your region is in the global market?	Responses	Percentage
<i>Not at all competitive</i>	1	1%
<i>Not very competitive</i>	11	16%
<i>Somewhat competitive</i>	23	34%
<i>Very competitive</i>	31	46%

4. How competitive do you believe your country is in the global market?	Responses	Percentage
<i>Not at all competitive</i>	1	1%
<i>Not very competitive</i>	9	13%
<i>Somewhat competitive</i>	27	40%
<i>Very competitive</i>	35	52%

5. A number of commentators indicate that Latin America as a region is lagging behind other regions in its ability to compete. In your estimation, how accurate are these commentaries?	Responses	Percentage
<i>Not at all accurate</i>	1	1%
<i>Not very accurate</i>	17	25%
<i>Somewhat accurate</i>	0	0%
<i>Accurate</i>	49	73%

6. What affect do reports like The World Economic Forum's Global Competitiveness Report have on influencing perceptions of the region as a good place to do business?	Responses	Percentage
<i>Tremendous influence</i>	18	27%
<i>Some influence</i>	46	69%
<i>No influence</i>	3	4%

7. Do you think that relatively negative rankings for the region in reports such as the World Bank's Doing Business Report and Transparency International's Corruption Perceptions Index hinder investment in the region?	Responses	Percentage
<i>Yes - A great deal</i>	30	45%
<i>Somewhat</i>	34	51%
<i>No - Not at all</i>	3	4%

8. In your estimation, are reports such as the World Economic Forum's Global Competitiveness Report, the World Bank's Doing Business Report, and the Transparency International's Corruption Perceptions Index an accurate reflection of your region?	Responses	Percentage
<i>Accurate</i>	49	73%
<i>Not very accurate</i>	17	25%
<i>Not at all accurate</i>	1	1%

9. Which issue, in your estimation, has the largest negative effect on your region's ability to compete?	Responses	Percentage
<i>Personal security</i>	6	9%
<i>Corruption/lack of law enforcement</i>	15	22%
<i>Inadequate infrastructure</i>	9	13%
<i>Weak business/investment climates</i>	19	28%
<i>Weak educational systems</i>	18	27%

10. What should your region focus on to enhance its ability to compete over the next 10 years?	Responses	Percentage
<i>Developing infrastructure</i>	6	9%
<i>Enforcing the rule of law/eliminating corruption</i>	14	21%
<i>Improving education systems</i>	23	34%
<i>Personal security</i>	4	6%
<i>Strengthening business/investment climates</i>	20	30%

11. To what extent has the reemergence of populist governments in Latin America affected the world's perception of the region as a good place to invest/do business?	Responses	Percentage
<i>A great deal</i>	32	48%
<i>Not at all</i>	9	13%
<i>Somewhat</i>	26	39%

12. Do you believe that the persistence of a large, informal economy is a major factor in retarding a country's competitiveness?	Responses	Percentage
<i>A great deal</i>	35	52%
<i>Not at all</i>	8	12%
<i>Somewhat</i>	24	36%

13. What is the best way to integrate the informal economy into the formal economy?	Responses	Percentage
<i>Decrease the regulatory burdens to formalize</i>	20	30%
<i>Enhance cooperative/vocational training</i>	7	10%
<i>Make labor laws more flexible</i>	5	7%
<i>Provide easier access to microcredits/financing</i>	17	25%
<i>Reform property rights and registration</i>	14	21%
<i>Tax reform</i>	4	6%

14. What should your country focus on to enhance its ability to compete in the next 10 years?	Responses	Percentage
<i>Developing infrastructure</i>	5	7%
<i>Enforcing the rule of law/eliminating corruption</i>	8	12%
<i>Improving education systems</i>	31	46%
<i>Personal security</i>	5	7%
<i>Strengthening business/investment climates</i>	18	27%

15. In an effort to improve the ability of your country to compete, cooperative relationships amongst businesses, academia, and the public sector currently exist.	Responses	Percentage
<i>TRUE</i>	<i>49</i>	<i>73%</i>
<i>FALSE</i>	<i>18</i>	<i>27%</i>

16. In terms of education, what grade levels should the region focus on in order to enhance the ability of all of its citizens to compete?	Responses	Percentage
<i>Cooperative/Vocational Training</i>	<i>12</i>	<i>18%</i>
<i>Elementary/Middle School</i>	<i>18</i>	<i>27%</i>
<i>Pre-school</i>	<i>6</i>	<i>9%</i>
<i>Secondary/High School</i>	<i>23</i>	<i>34%</i>
<i>University</i>	<i>8</i>	<i>12%</i>

17. What should governments in your region emphasize in order to maximize the opportunities for its citizens to better compete?	Responses	Percentage
<i>Decreased regulation of key industries</i>	<i>4</i>	<i>6%</i>
<i>Improve education and training</i>	<i>41</i>	<i>61%</i>
<i>Improve the environment for entrepreneurship</i>	<i>15</i>	<i>22%</i>
<i>Provide access to healthcare</i>	<i>4</i>	<i>6%</i>
<i>Tax reform</i>	<i>3</i>	<i>4%</i>

APPENDIX 3: OFFICIAL GOVERNMENT PARTICIPATION

Argentina

José Lino Barañao, Minister of Science, Technology and Production Innovation
Beatriz Nofal, President, National Investment Development Agency
D. Héctor Marcos Timerman, Ambassador of Argentina

Barbados

Darcy Boyce, Minister of State in the Ministry of Finance
Michael King, Ambassador of Barbados

Canada

Jim Prentice, Minister of Industry

Chile

Hugo Lavados, Minister of Economy
Mariano Fernández, Ambassador of Chile

Colombia

Alvaro Uribe Velez, President of the Republic of Colombia
Luis Plata Paez, Minister of Commerce
Carolina Barco, Ambassador of Colombia
Julio Riaño, Ambassador, Ministry of Foreign Affairs
Alex Char, Mayor of Barranquilla

Costa Rica

Marco Vinicio Ruiz, Minister of Foreign Trade
Jorge Woodbridge, Minister of Competitiveness
Marco Vargas, Minister of Institutional Coordination
F. Tomás Dueñas, Ambassador of Costa Rica

Dominican Republic

Miguel Calzada Leon, Ambassador at Large, Ministry of Foreign Affairs

Ecuador

Susana Cabeza de Vaca, Coordinating Minister of Production
Xavier Abad, Minister of Industry and Competitiveness
Luis Gallegos, Ambassador of Ecuador

El Salvador

Elias Antonio Saca, President of the Republic of El Salvador
Jose Ruben Alonso Rochi, Minister of Tourism
Ricardo Esmahan, Minister of Economy
Yolanda de Gavidia, Special Envoy, Office of the President
Carmen Tobar, Deputy Chief of Mission

Guatemala

Álvaro Colom Caballeros, President of the Republic of Guatemala
Haroldo Rodas Melgar, Foreign Minister
Rómulo Caballeros Otero, Minister of Economy

Rubén Morales, Vice Minister of Economy for Integration and Foreign Trade
Ana Ordóñez de Molina, Minister of Education
Carlos Enrique Mata Castillo, Coordinator for Investment and Competitiveness (PRONACOM)
Julio Eduardo Orozco Pérez, Director, Guatemalan Tourism Institute (INGUAT)
Stephen McFarland, U.S. Ambassador to Guatemala
Francisco Villagrán de Leon, Ambassador to the United States

Honduras

Fredis A. Cerrato, Minister of Industry and Trade
Roberto Flores Bermúdez, Ambassador of Honduras

Jamaica

Michael Stern, Minister of Industry, Investment and Commerce
Robert Gregory, President, Jamaica Trade and Investment

Mexico

Gerardo Ruiz Mateos, Secretary of Economy
Rodolfo Elizondo Torres, Secretary of Tourism, SECTUR
Beatriz Leycegui, Undersecretary for International Trade Negotiations, Ministry of Economy

Nicaragua

Jaime Morales Carazo, Vice President of the Republic of Nicaragua
Javier Chamorro, Executive Director, ProNicaragua
Arturo J. Cruz, Jr., Ambassador of Nicaragua

Panama

Severo Sousa, Vice Minister of Trade and Industry

Peru

Mercedes Aráoz, Minister of Trade and Tourism
Felipe Ortiz de Zevallos, Ambassador of Peru

St. Lucia

Rufus George Bousquet, Minister of Trade, Industry, and Commerce
Allen Chastanet, Minister for Tourism and Civil Aviation
Darrel Montroppe, Permanent Secretary for Tourism and Civil Aviation
Richard Frederick, Minister of Housing, Urban Renewal, and Planning

St. Vincent & the Grenadines

La Celia A. Prince, Ambassador of St. Vincent and the Grenadines

Trinidad & Tobago

Glenda Morean-Phillip, Ambassador of Trinidad and Tobago

United States

Carlos M. Gutierrez, U.S. Secretary of Commerce

Uruguay

Daniel Martinez, Minister of Industry, Energy and Mining
Miguel Brechner, President, Uruguay Technology Laboratory (LATU)

Dan Piestun, President, INIA
Carlos Alberto Gianelli Derois, Ambassador of Uruguay