



St Helena's Sustainable Economic Development Plan

2018 - 2028

St Helena Government

Mid-Year Progress Report – October 2019

Background

St Helena's Sustainable Economic Development Plan (SEDP) 2018-2028 was endorsed by Executive Council in May 2018. In order to ensure that the SEDP continues to be effective, six monthly reviews of the actions were planned, alongside yearly updates of indicator data.

The speed of implementation of the SEDP largely depends upon a number of external factors including funding, private sector initiative and investor interest. Despite this, St Helena Government's Corporate Planning and Policy Unit (CPPU) have been working to an internal implementation plan which assigns responsibilities and timescales. In the first few months after the SEDP was endorsed, the Chief Government Economist delivered presentations to teams within SHG and ESH who were responsible for delivering actions for the SEDP to ensure that the actions were well understood. Thereafter, CPPU's performance manager have been monitoring progress.

The SEDP presents many actions required to achieve the SEDP goals. In order to avoid overloading the reader with information, this update only reports progress against actions pegged to be started or achieved within the 2018-19 and 2019-20 year.

The actions outlined in this report are important because they reduce barriers or open up opportunities to economic development and help to achieve the SEDP vision. The SEDP vision is to achieve development which is economically, environmentally and socially sustainable and this vision will be achieved by increasing standards of living and quality of life; not relying on aid payments from the UK in the longer term; whilst affording to maintain the island's infrastructure; achieve more money coming into St Helena than going out and sustain and improve St Helena's natural resources for this generation and the next. The goals, as set out in the SEDP, which will help achieve the vision are as follows:

- 1. Increase Exports**

Selling goods made, grown or caught in St Helena to markets abroad and people from abroad increases the amount of money entering St Helena, which can help raise standards of living.
- 2. Substitute Imports**

Buying and consuming goods and services made, grown or caught in St Helena rather than buying and consuming imported goods and services reduces the amount of money leaving St Helena.
- 3. Attract Visitors and Increase Tourism**

Encouraging the provision of tourist infrastructure required for a variety of visitor needs from hotels, restaurants and attractions serviced by a skilled and customer focused workforce.
- 4. Mitigate impacts of inflation on the lowest income groups**

Avoiding reduction in purchasing power by the lowest income groups by regularly reviewing the Minimum Wage and Social Protection benefits.
- 5. Improve Land Productivity**

Making use of derelict or underused brownfield land and changing use of existing property to provide space for businesses to thrive. Supporting businesses to make the most productive use of land.
- 6. Sustain and improve our Natural Capital**

Maintaining and enhancing St Helena's exceptional environment, landscape, heritage and cultural qualities for this generation and the next.
- 7. Improve Infrastructure**

Using tax revenue and other funding streams for investments to improve health, education, water, electricity, transport, risk management and other infrastructure.
- 8. Develop, Maintain and Attract a Skilled Workforce**

Ensuring that local people develop skills which will contribute to the growth of St Helena's economy. Providing the wages and incentives for St Helenians to come back to St Helena and stay on St Helena. Supporting inward migration particularly in sectors where there are skills or labour shortages.
- 9. Develop the Digital Economy**

Open up St Helena to new economic markets by investing in broadband services and infrastructure, work towards delivering a fibre optic cable for the island.
- 10. Reduce Leakage of Income**

Provide investment opportunities for people living on St Helena to buy into, as an alternative to investing abroad. Ensure some of the returns on overseas investment is kept within St Helena.

Economic Outlook

State of the economy: September 2019

Employment

St Helena is a small and remote island community with around 4,500 residents. Many residents work in multiple roles in order to provide services to the local economy.

Unemployment is generally low but rose recently mainly as a result of the end of the recent investment in the Airport and associated infrastructure. The latest data on incomes show the median income to be £8,500 per annum in 2017/18 compared to £8,220 in 2016/17. Inflation increased faster than wages in 2017/18 compared to the year previous, so the real median income rose by £270 in 2016/17 and dropped slightly by £60 in 2017/18.

The average number of unemployment benefit claimants during 2018/19 was 23, up from 13 in the previous year and a further sign that the St Helena economy experienced downturn in 2018/19, largely due to a reduction in fiscal stimulus due to the end of the airport construction project. For the first half of 2019/20, the average monthly unemployment benefit claimants rose to 41.5. It is not expected that these newly unemployed will be long term unemployed because of their skills, but it will take time for the workforce to absorb these potential workers. New investments seen in housing developments and spending the budget allocated for the Economic Development Investment Programme will be important economic stimuli for the next year. Meanwhile, labour shortages continue within hospitality and care professions.

Sectors

Gross Value Added is the measure of the value of goods and services produced in a sector. National Accounts statistics published in 2019 show that the sectors contributing the most to the economy in 2017/18 (apart from Government services, which contributes around 50% of total Gross Value Added, or GVA) were retailing (19% of total GVA),

telecommunications/finance/insurance (14%), production (including water and electricity provision) (8%), and construction (4%).

St Helena is able to compete internationally on the basis of quality drawing on the island's geography, shared language, currency, time zone and close ties with the United Kingdom, low crime and corruption and relatively inexpensive labour and property costs. Exports are concentrated on high quality products including coffee, premium tuna, and niche tourism. Potential opportunities exist for St Helena to compete on the world stage and have been outlined in the SEDP; they include international research, the export of honey bees and honey, developing the digital sector and registering vessels with the Red Ensign.

Unlike larger economies, St Helena's remoteness also constrains its ability to improve productivity through mechanisation and automation. One example is the installation of Automated Teller Machines (ATMs), which has not been possible because the cost of specialised maintenance and repair is too high. While the commercial air service has significantly reduced the cost of importing services (particularly as a result of travel times reducing from five days to one day), specialist maintenance costs remains challenging. A major constraint compared to larger, better connected economies, is the current high cost and slow speed of accessing the internet; a challenge due to be abated by connection to a fibre optic cable in 2021.

In terms of business outlook, the 2018 business survey results show that businesses in most sectors felt that there are opportunities for growth which exist in the coming year, however there is also a feeling that costs of doing business is increasing.

Table 1: Business Outlook, Business Survey, 2018

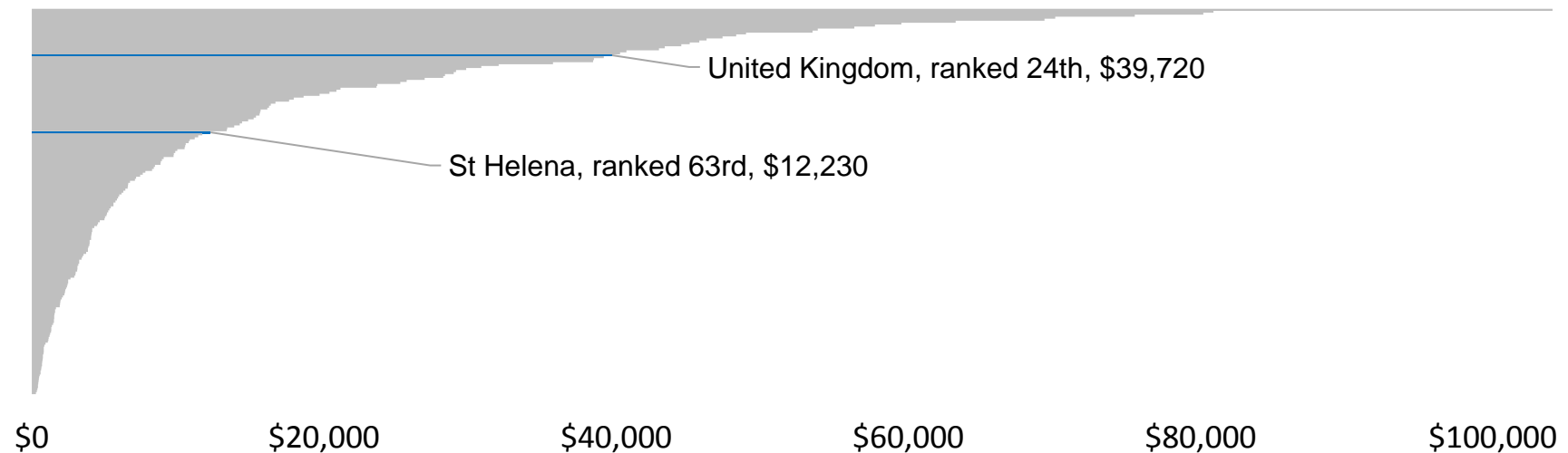
% of businesses reporting	Demand increasing	Demand decreasing	Demand unchanged	Running costs are increasing	Running costs increasing dramatically	Running costs decreasing	New opportunities for growth	Expanding the business into new areas
Agriculture, forestry, fishing	47%	7%	33%	73%	33%	13%	67%	33%
Quarrying, manufacturing, electricity, water and sanitation	30%	20%	50%	60%	40%	20%	70%	30%
Construction	18%	44%	38%	53%	44%	3%	26%	32%
Wholesale and retail trade, repair of motor vehicles, transportation	39%	23%	36%	70%	30%	20%	57%	32%
Accommodation and food service activities	24%	48%	21%	66%	62%	7%	38%	17%
Finance, insurance, information, communication, real estate	33%	17%	50%	83%	33%	17%	83%	50%
All other service activities	57%	19%	19%	62%	43%	29%	62%	38%
Total	34%	30%	33%	65%	42%	14%	50%	31%

Gross Domestic Product

The typical headline measure of the overall economy, Gross Domestic Product (GDP), has limited usefulness in the context of St Helena. Aid flows represent a significant proportion of total GDP, so changes to the levels of aid have a corresponding impact on GDP and the estimates of the growth in St Helena's economy. Additionally, large one-off projects, such as the Airport construction project, can make substantial differences to the estimates and make their interpretation very difficult. There are also measurement challenges, with limited confidence in some data sets or data gaps in areas typically covered in larger economies by regular statistical surveys.

Nonetheless, St Helena's Statistics Office estimated Gross Domestic Product (GDP) for the 2017/18 financial year at £42.4 million, or about £9,220 per capita. GDP is estimated to have fallen by 7.1% in 2016/17 and 1.7% in 2017/18 as the Airport construction period came to an end. The 2017/18 estimate uses the production approach, and is based on total Gross Value Added, plus customs duties. The Statistics Office has improved data sources and methodology for the national accounts, working closely with the UK Office for National Statistics, but inflation, tax revenue, population, and employment and wage data has also been used to describe the state of the economy over the past financial year.

Chart 1: Countries ranked by GDP per capita in 2017 (St Helena is 17/18), \$ nominal



Addressing the trade imbalance

St Helena has many comparative advantages. It benefits from significant natural resources; premium grade tuna, some of the world's most expensive and sought after coffee, and an ecosystem which supports a third of all the endemic species in the British territories and attracts tourists. St Helena is also a safe and easy place to visit; the Island uses the Pound as currency and speaks the English language. And the Airport provides an opportunity for St Helena to better compete internationally, since it reduces the time needed to travel to the Island. Increasing exports, and reducing reliance on imports by producing, supplying and buying local are the key strategies to help retain income on St Helena and to reduce the annual trade deficit, and to help St Helena to become self-sufficient in the longer term.

The Statistics Office estimates that imports of goods for 2018/19 totalled £19.4m (of which £1.4m was for the Airport and associated infrastructure construction project), with the value of St Helena's main goods exports (fish and coffee) at

£419,000. Around 75% of goods exports were fish, with coffee a further 25%. Funds transferred to and from abroad through the Bank of St Helena is a reasonable proxy for the movement of funds in and out of St Helena. For 2018/19, this showed £39.2m going out (mostly to pay for imports) and £16.5m coming in to the Bank of St Helena.

Whilst coffee exports continue to develop, with continued investments in coffee plantations, the export of fresh fish by air has fallen in the first six months of the 2019-20 financial year. The existing fish processing plant continues to require subsidy, due to high energy costs and low prices received for standard frozen exported tuna, due to a regional increase in catches influencing downward pressure on prices over the last year.

Tourist numbers have increased since the air service started. Spending of leisure visitors arriving by air was around £5.8 million during the twelve month period from October 2018 to September 2019 (56% by Saints, and 44% by non-Saints). This is a provisional figure based on estimates of on-Island average daily expenditure from the St Helena Air Visitors Survey, at £190 per day for a non-Saint tourist, and £110 a day for a Saint visiting friends and family. It is estimated that of this 50% is used to buy imported goods and services and the remainder contributes to a multiplier effect on-Island.

Table 2: Tourist Arrivals

Time period	Oct 2016-Sep 2017	Oct 2017-Sep 2018	Oct 2018-Sep 2019
Arrivals for tourism or holiday, total	973	2,316	2,407
Of which were non St Helenian visitors from abroad	357	1,338	1,295

In November 2019 the St Helena Research Institute launched, which will encourage research visitors to St Helena, with a focus on blue and green environmental research, health and social research.

New preliminary Balance of Payment Statistics have been developed by SHG Statistics Office considering current and capital accounts (excluding financial accounts).

Table 3: Provisional Balance of Payment Statistics, 2019

St Helena Balance of Payments Statistics - Current and Capital Account								£ millions, current	
	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19
Current Account									
Credits (receipts)	23.6	25.2	22.4	22.7	22.1	23.7	26.8	33.4	35.6
Goods and Services exports	2.7	2.9	1.9	2.0	2.4	2.4	1.9	2.9	7.0
<i>Goods</i>	0.3	0.9	0.2	0.0	0.2	0.3	0.3	0.3	0.4
<i>Services (travel expenses of tourists and business visitors on St Helena)</i>	2.4	2.0	1.7	2.0	2.2	2.1	1.6	2.6	6.6
Income from SHG investments abroad	0.3	0.3	0.4	0.3	0.2	0.2	0.2	0.1	0.2
Current transfers	20.7	22.0	20.1	20.3	19.5	21.2	24.8	30.4	28.5
<i>General government (financial aid)</i>	18.5	20.0	18.1	18.4	17.6	19.3	22.9	28.5	26.7
<i>Personal transfers from abroad</i>	2.2	2.1	2.1	2.0	2.0	1.9	1.9	1.8	1.8
Debits (payments)	17.9	20.7	30.6	32.1	31.7	30.8	30.6	38.8	29.6
Goods and Services imports	17.3	20.0	29.5	30.2	29.1	27.9	28.2	36.3	27.1
<i>Goods</i>	11.9	13.0	22.6	23.2	22.9	23.1	19.9	24.8	19.3
<i>Services</i>	5.4	7.0	6.9	7.0	6.2	4.9	8.3	11.5	7.7
<i>Transport (freight)</i>	4.0	4.6	4.4	3.8	2.9	1.3	4.2	7.0	3.9
<i>Travel expenses of residents abroad</i>	0.5	0.5	0.8	0.7	0.6	0.7	0.6	0.9	0.9
<i>Other (training and medical costs abroad, advisory services, telecoms)</i>	0.9	1.9	1.6	2.5	2.7	2.9	3.5	3.6	2.9
Current transfers	0.6	0.7	1.2	1.8	2.7	2.8	2.4	2.5	2.6
<i>Personal transfers</i>	0.6	0.7	1.2	1.8	2.7	2.8	2.4	2.5	2.6
Balance on Current Account (credits less debits)	5.7	4.5	-8.2	-9.4	-9.7	-7.0	-3.7	-5.4	6.0
Capital Account									
Credits (receipts)	15.2	4.3	7.8	11.2	11.5	10.4	12.9	10.2	13.0
Capital transfers (development aid, excluding airport)	15.2	4.3	7.8	11.2	11.5	10.4	12.9	10.2	13.0
Balance on Current and Capital Accounts (credits less debits)	20.9	8.8	-0.4	1.8	1.8	3.3	9.1	4.8	19.0
Memo: Goods									
Exports	0.3	0.9	0.2	0.0	0.2	0.3	0.3	0.3	0.4
Imports	11.9	13.0	22.6	23.2	22.9	23.1	19.9	24.8	19.3
Goods Trade Balance	-11.6	-12.2	-22.4	-23.2	-22.7	-22.8	-19.7	-24.5	-18.9
Note: imports and exports of goods for 14/15 and 15/16 are estimates									
Prepared by St Helena Statistics Office, 29 October 2019: preliminary data, subject to revision									

Supporting investment

There is a particular focus within SHG and ESH to facilitate investment. The [Investment Policy](#) was refreshed in May 2018 and the [Investment Strategy](#) was endorsed in April 2019; it includes a description of the incentives which are available to investors including lower corporation tax rates for selected export/import substitution sectors and reduced import duties as per the Approved Investment Scheme. The [Investment Prospectus](#) was launched in October 2019; this is geared towards the investor reader and includes information on opportunities and strategic assets available for sale.

The Immigration Policy is also being updated in 2019/20 to ensure that the process for managing immigration is as transparent and streamlined as possible to facilitate investment.

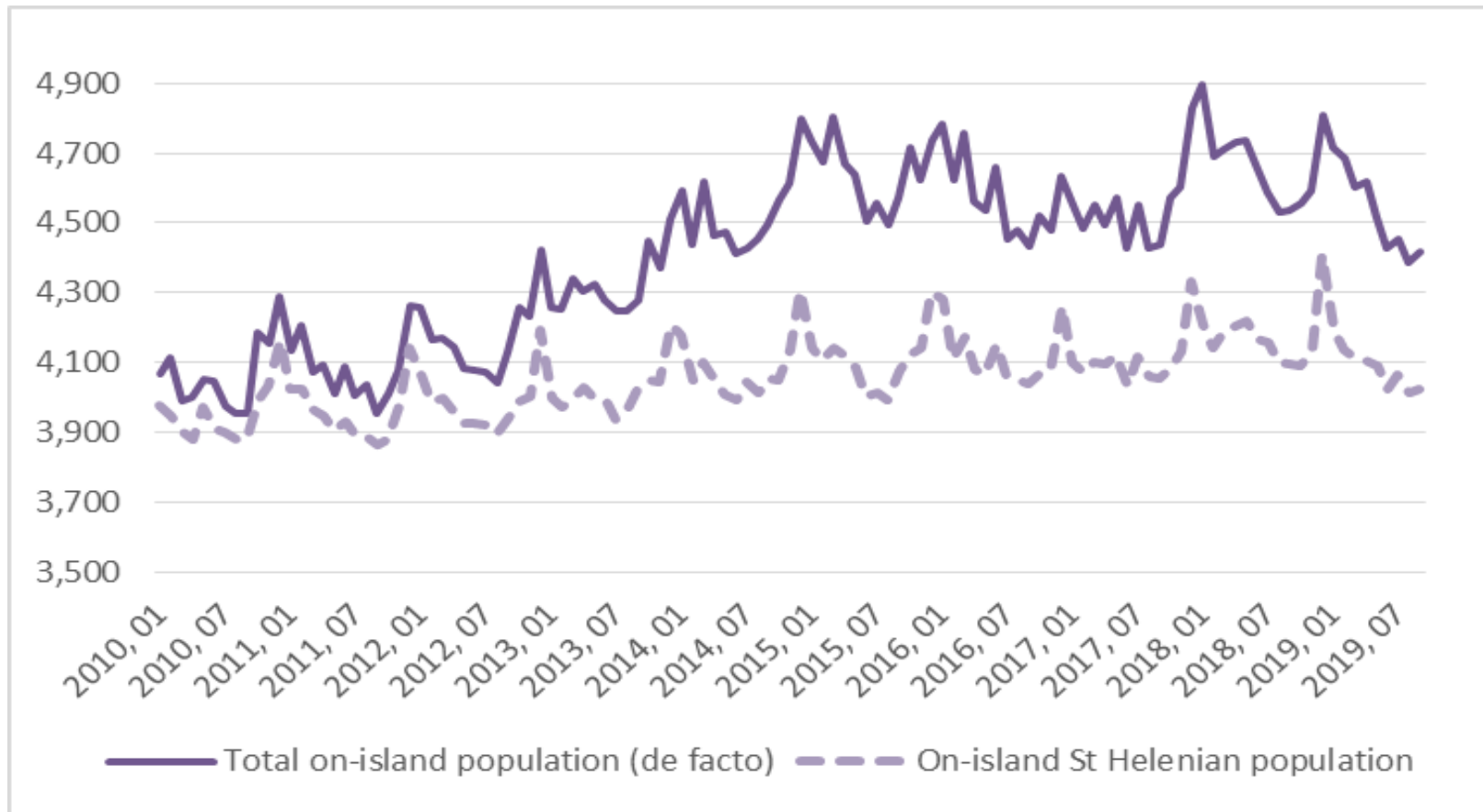
In addition to targeting strategic investments, ESH supports local entrepreneurs to start up and expand their businesses. In 2017-18, as part of the business engagement programme, over 400 businesses were met and consulted with; 114 existing businesses and 41 potential new-business start-ups were supported either financially or from advisory services; a further 113 non-financially supported clients also benefitted from advice.

The challenge of demographic change

The estimated average monthly population on the island was 4,536 (January – September 2019), compared to 4,645 in 2018 and 4,601 in 2017. There are marked seasonal variations in the population estimates, with numbers increasing over the Christmas holiday period. In 2017/18 and 2018/19, over 700 people left St Helena for overseas employment or emigration each year. This is similar to previous years; many of these emigrants return at the end of contracts, and new opportunities resulting from commercial flights commencing will encourage St Helenians to return to the Island, and others to visit and live on St Helena.

Chart 2 shows changes in population in recent years.

Chart 2: Total on-Island and St Helenian Population



St Helena has an aging population. The median age has risen from 33 in 1998 to 47 in 2016, and the old age dependency ratio (the number of people of pensionable age compared to the number of people of working age) has more than doubled in the same period, from 17 to 35. More than one in five of the St Helena population is over the age of 65.

With the current birth rate, and without higher inward migration of younger people, or younger St Helenians returning from overseas, this trend will continue. Like many countries with a high old age dependency ratio, this poses a significant challenge for the economy, for example to maintain tax revenues from a shrinking workforce, and to provide care for increasing numbers of elderly.

Infrastructure

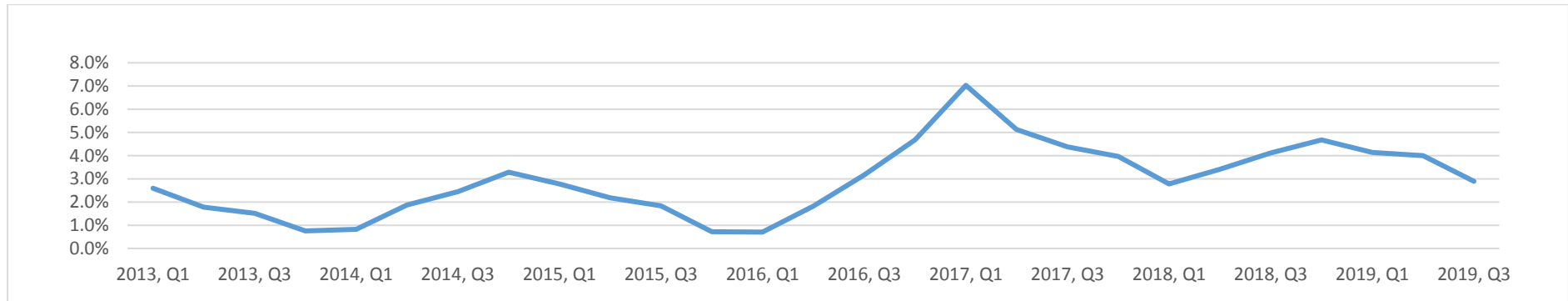
Investment in infrastructure is crucial to stimulate economic growth. Completion of the Rupert's Wharf project will enable relocation of the port operation and provide the opportunity to develop Jamestown waterfront for commercial use. Investment in renewable energy infrastructure reduces reliance on imported fossil fuels with volatile prices. Investment in a connection to the undersea fibre optic cable will provide faster and cheaper access to the internet, opening up new opportunities to improve productivity, develop new economic activity, and deliver public services more efficiently. As well as providing direct economic benefits, these investments will facilitate education and upskilling, the green agenda and provide telemedicine opportunities, which will underpin future sustainable economic growth and improvements in social wellbeing. The UK Government has clearly signalled its commitment to St Helena by providing up to £30m to improve the Island's infrastructure over the next six years (2019/20-2024/25), £15m of which is committed over the next three years (2019/20-2021/22), and £15m which is indicatively planned for the subsequent three years (2022/23- 2024/25) subject to a review to be undertaken at the halfway stage of the implementation.

Inflation

Since most goods available on St Helena are imported, prices paid by consumers are affected by three key factors: changes in the exchange rate of the Pound against the Rand (and to a lesser extent the US Dollar and Euro); price inflation in South Africa and the UK; and changes to the freight tariff of the only ship carrying imported goods to St Helena, the MV Helena.

Inflation rates were relatively steady in 2018/19, following the sharp increase 2016/17 caused by the UK vote to leave the European Union and the subsequent drop in the value of the Pound, and a drought in South Africa. Nonetheless inflation rates are relatively high compared to the UK. The relative strength of the Pound against the South African Rand was a key reason why inflation rates have not been higher.

Chart 3: Annual price inflation rate, St Helena, 2013 to Q3 2019



The inflation expectation (revised July 2019) for 2019/20 is 4.2%, 2020/21 is 4.4%, and 2021/22 is 4.0%. This prediction is calculated using the lagged relationship between prices on St Helena and in the UK and South Africa, and the inflation expectations of the UK and South Africa.

St Helena's biggest import is gasoline and diesel for transport and electricity generation, and St Helena's economy is therefore very sensitive to changes in the price of oil. Oil prices have been very volatile, and dollar oil prices have risen significantly. The chart below shows actual oil prices compared to forecasts from the UK Government's Office of Budget Responsibility, illustrating the difficulty in making accurate projections.

Chart 4: Oil price forecast, \$ per barrel



Inflation forecasts for St Helena are reliant on assumptions/forecasts of prices in the UK and South African economies, and global oil prices. Oil prices are typically volatile and difficult to predict, as is the impact of the expected departure of the UK from the EU. Prices on St Helena, and the economy as a whole, will be impacted by external shocks. St Helena's energy strategy encourages investment in renewable energy, to reduce the negative affect of volatile oil price changes on the St Helena economy.

SEDP Progress Summary

Progress to date: October 2019

The progress within the first six months of 2019/20 shows positive movement in many of the SEDP sectors. The headlines are as follows:

- A Letter of Intent was signed in July 2019 with Google for a branching unit on the Equiano cable to deliver superfast broadband to St Helena. Work has begun within SHG to develop plans for the Cable Landing Station in Rupert's Valley. A visioning exercise was also undertaken with the public in July 2019 which led to the development of a 'needs and delimiters paper' which outlines public expectations on the realisation of the Digital Strategy.
- The Investment Prospectus was endorsed and launched in October 2019 with an event in St Helena and London. This includes information on starting up and expanding business. <http://www.investinsthena.com/project-details/investment/>
- The Research Institute Launched in November 2019 with an event in St Helena and London. The launch included a competition for researchers willing to develop an academic paper evaluating the impacts of achieving St Helena's Digital Strategy.
- The Ship Registry Policy was updated in October 2019 to broaden eligibility for yachts and pleasure vessels to be registered with the Red Ensign in St Helena. <https://www.sainthelena.gov.sh/public-services/registry/>
- The Labour Market Strategy was consulted upon and is due to be endorsed in December 2019.
- 2,407 Tourist visitors arrived between October 2018 and September 2019, compared to 2,316 during the same period the previous year 2017-18 and 973 in the same period in 2016-17.
- The Minimum Income Standard was updated to reflect inflationary increases in prices, and the Basic Island Pension and Income Related Benefit increased as a result. The basic level of IRB for a single person increased from £70 per




week to £71.50 in October 2019. The Minimum Wage increased by 8p in April 2019. Both changes ensured that those with the lowest incomes were protected against price increases.






- A site for a new 'marine lab' has been identified in Jamestown and funding has been secured. Planning permission has been granted.
- Work on the Tourist Office to help towards improving the look of buildings in Jamestown and include wheelchair access has now been completed.
- Spending on St Helena's Economic Development Investment Programme (EDIP) has been agreed for the micro-projects budget, rock fall protection, IT investment and consultancy support.
- SHG's Waste Management Service (WMS) have implemented aluminium drink cans recycling on site at HPLS with the intention of exporting this valuable waste stream. Plastics recycling is now being undertaken by Shape.





This progress is on top of the progress outlined in the End of Year progress report, published in June 2019.






The following section outlines the actions relevant to 2019-20 and specific progress.








SEDP Sector






Mitigation actions	Progress Comments	Progress status
Common Issues		
As per Investment Strategy for St Helena, private investment should be facilitated to start-up and expand business (subject to labour and displacement impacts). Private Sector funding sources need to be identified to support sectors to invest in cost saving infrastructure.	The Investment Prospectus was endorsed and launched in October 2019. This includes information on starting up and expanding business. http://www.investinsthena.com/project-details/investment/	 done & ongoing
A circular economy approach, as set out in the Waste Management Strategy needs to be acted upon to make the best use of resources.	A draft Waste Management Policy is out for public consultation until 8th November 2019. The existing 2017 Waste Management Strategy is being revised and updated as an Implementation Plan. Waste Management Services (WMS) continue to support; SHAPE with plastics recycling and private sector with glass recycling. WMS continue to support SHNT with organic waste composting at Millennium Forest and OCTA Innovation Project to implement organic waste composting using green waste and piggery effluent on site at HPLS. WMS have implemented aluminium drink cans recycling on site at HPLS with the intention of exporting this valuable waste stream. Capital Programme business cases submitted for plant to establish a commercial recycling centre at HPLS. Circular economy already embedded within Waste Management Services operations - new signage at HPLS constructed from waste materials found on site, negating the need for budget expenditure for the same.	 in progress
Regular Labour Surveys are required to understand labour and skills shortages in more detail.	The business survey was undertaken in November 2018 and October 2019. This includes questions regarding skills shortages which feed into the update of the shortage occupation list.	 done & ongoing

<p>St Helena Government need to gain a credit rating in order for institutions and businesses operating in St Helena to raise capital in the international financial market.</p>	<p>Credit rating team was on island in October 2019 and a credit rating is being prepared</p>	 in progress
 <p>Tourism</p>		
<p>Market in targeted magazines, and via journalists and tour operators. Ensure experiences, tours and accommodation are marketed and easily bookable online.</p>	<p>St Helena has been promoted in a variety of publications in the UK, SA and Europe. In addition a number of journalists have been hosted and joint marketing activities with selected Tour operators.</p>	 done & ongoing
<p>Ensure upkeep and investment of heritage information signs.</p>	<p>The interpretation signage procured have been received and being prepared for installation. Discussions are being held for the bicentenary project as well as the Liberated African project.</p>	 done & ongoing
<p>Ensure litter picking parties address litter at tourist attractions and post box walks. Undertake annual litter awareness campaigns and introduce fines for littering. Ensure public toilets are refurbished and cleaned. Demonstrate a local pride in Environment.</p>	<p>Waste Management Services (WMS) developing a waste prevention campaign (marine pollution) with EMD Marine, SHNT Marine and SHAPE for December 2019. Targeted tidy-ups have continued such as; Plantation Forest, Redhill to White Gate and Merrimans Forest. Roadside litter picks by RCV crews have continued. Increasing this activity to include all tourist areas is not sustainable with the current workforce therefore either enforcement by appropriate authorities (in line with the EPO) is required to reduce littering or an increase in WMS staffing to take on this additional workload.</p>	 in progress

	<p>EDIP micro-projects budget agreed expenditure on refurbishment of public toilets and installation of solar street lighting. WMS clean public toilets regularly (daily in Jamestown).</p> <p>On the spot fines are being proposed by the Police Department for endorsement by EXCO in November 2019.</p>	
 Fisheries		
<p>Tackle the shortage of fisherman through apprenticeships.</p>	<p>One apprentice has completed their programme with SHFC and was offered full time employment. Within the new Apprenticeship cohort there is one student who is interested in undertaking an apprenticeship in SHFC but we are awaiting confirmation on his placement.</p>	 done & ongoing
<p>Work to ensure sufficient investment financing is achieved (private or public). Focus funding to provide i) freezing/cooling infrastructure ii) cost reduction investments iii) replacement equipment iv) debt relief.</p>	<p>Freezer downsizing project was funded in 2019. Work was completed as specified, however further work was identified during this exercise which is yet to be undertaken.</p>	 in progress
 Agriculture		
<p>Encourage shops to sign future contracts with local producers.</p>	<p>Solomon's said: 'Whilst this does occur piece-meal from time to time with some supply items, for this approach to be formalised there would need to be a consensus on issues of quality, reliability of supply and terms in relation to pricing with mutually beneficial parameters agreed for this to be viable for both supplier and retailer. We continue to work with suppliers/local producers and to contribute to the economy through providing a market for such supply.'</p>	Project Inception

	However the newly in place Agronomist has begun working to develop relationships to meet this goal.	
Provide financial support to producers who are trialling growth of new agricultural products which could substitute imports or be exported.	Harpers is in the process of being set up as a hub for agricultural training, along with a research and development centre. The first training took place at the centre on Tuesday, 22 October.	Project Inception
Continue to fund management of invasive species. Ensure compliance by leaseholders with respect to land management.	The Invasive Plant Project is nearing completion and all guidelines, invasive plant trials information and results carried out on agricultural land will be shared with agricultural producers in this last quarter of the project where there is a willingness by producers to attend information sessions.	 in progress
Support the development of infrastructure to collect and convert organic waste to compost.	WMS continue to support SHNT with organic waste composting at Millennium Forest and OCTA Innovation Project to implement organic waste composting using green waste and piggery effluent on site at HPLS.	Project Inception
 Satellite Ground Stations		
Ensure that funding is in place for the sub-marine cable for a source of cheaper, faster internet.	EU funding for the cable has been secured. A Letter of Intent has been signed with Google to enter a contract to deliver connectivity via a subsea cable in 2021.	 done & ongoing
Continue to communicate with those expressing an interest in developing a ground station on St Helena and develop associated Memorandum of Understanding when the time is right.	Ground Satellite Station companies have been engaged to express interest. A ground station policy is being developed for consultation in November-December 2019.	 in progress
Strategically allocate potential plots of land for the satellite ground station well in advance.	Initial plot options have been identified with Lands & Estates, based upon their suitability to track satellites (with a north/south view to the horizon). The Bradley's Camp Option has been agreed in principle by the Estates Strategy Panel as the principle location of the 'space park'. Other locations nearby are also being considered.	 in progress

 Work from Home Jobs		
<p>Ensure that funding is in place for the sub-marine cable for a source of cheaper, faster internet.</p>	<p>EU funding for the cable has been secured. A Letter of Intent has been signed with Google to enter a contract to deliver connectivity via a subsea cable in 2021.</p>	 <p>done</p> <p>& ongoing</p>
<p>Ensure that there is a focus on I.T. in schools and training programmes. Expose young people to, and make available studies in programming, computer-aided design (CAD), Geographic Information Systems (GIS) and code writing.</p>	<p>A programme of IT courses were made available with enrolment from September 2018 and 2019. These courses ranged from introductory courses to advanced courses, in programming for example.</p>	 <p>done</p>
 Honey and Honey Bees		
<p>ESH to continue work with research centres to understand the value of bees. Bee DNA to be ascertained.</p>	<p>ESH Board approved funding for another attempt at extracting Bee DNA. It has also been approved by the St Helena Research Institute. ANRD are progressing this initiative, however it is expected that results will not be available until 2020.</p>	 <p>in progress</p>
<p>Research what plants are good for bees and non-invasive.</p>	<p>National Trust developed a list of trees and plants which would be beneficial. ESH published this information in a leaflet in 2019.</p>	 <p>done</p>
<p>The public should be encouraged to grow non-invasive flowers which are good for bees.</p>	<p>National Trust are propagating plants for sale, and it is planned, once there are sufficient for sale, this will be publicised as part of a small campaign on trees for bees. This could come at the same time other suppliers such as the growers have further stock to sell.</p>	 <p>in progress</p>

 Academia, Research and Conferences		
<p>Some industries require funding and facilitation of research through links with overseas partners such as universities.</p>	<p>The St Helena Research Institute was launched in November 2019.</p>	 done
<p>Continue to work with Research Institutes to develop well marketed conferences and research opportunities.</p>	<p>A conference occurred in both 2018 and 2019, led by SAERI and JNCC. An IT based conference is planned in 2020, led by ESH.</p>	 done & ongoing
<p>Ensure there are suitable venues available to host conferences and provide conferencing infrastructure.</p>	<p>A list of conferencing spaces to be made, however this will need to be done in conjunction with the Research Institute and others who are already preparing for additional conferences.</p>	<p>Project Inception</p>
 Ship Registry and Sailing Qualifications		
<p>Update the Ship Registry Gazette to include a list of countries which is consistent with other countries in the Red Ensign Group</p>	<p>The new Ship Registry Policy was endorsed by EXCO in October 2019. SHG attended the Red Ensign conference in June 2018.</p>	 done