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**REPORT OF THE SUBREGIONAL MEETING ON THE  
CONTRIBUTION OF YACHTING TO DEVELOPMENT  
IN THE EASTERN CARIBBEAN**

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## **REPORT OF THE SUBREGIONAL MEETING ON THE CONTRIBUTION OF YACHTING TO DEVELOPMENT IN THE EASTERN CARIBBEAN**

Following the national consultations that were held to discuss the country studies prepared under the *Development of a Regional Marine-based Tourism Strategy Project (NET/00/079)*, the Economic Commission for Latin America and the Caribbean (ECLAC) Subregional Headquarters for the Caribbean convened a subregional meeting on 12-13 December 2002.

The meeting highlighted the strengths and weaknesses of the subregional yachting sector, based on reports of the country studies and the findings of small working groups. The working groups focused on those issues that had regional implications. They then identified the critical players and mechanisms that would be needed to implement recommended actions.

Attending the meeting, were individuals representing both the public and private sectors in those countries where national studies had been conducted (Antigua and Barbuda, the British Virgin Islands, Grenada, Netherlands Antilles [St. Maarten], Saint Lucia, Saint Vincent and the Grenadines and Trinidad and Tobago). A list of participants is appended to this report.

### **Agenda item 1: Opening**

In her welcoming remarks, the Director of the ECLAC Subregional Headquarters for the Caribbean, Ms. Len Ishmael provided some background for the meeting. She noted that the considerable attention being paid to regional tourism development was directed towards the ecological, cruise-ship and event-related sectors, to the almost complete exclusion of yachting. The significance of the yacht charter-for-pleasure industry, which had developed from small, mostly family owned operations in the 1960s to a multi-million dollar industry in the 1980s and 1990s, was not being officially recognised. Further, there existed no formal research that investigated or described the yachting sector at the environmental or socio-economic levels.

In response to this need, the ECLAC Subregional Headquarters for the Caribbean had conceived of a project that would uncover and analyse data on the yachting sector. Findings would be used to provide a better understanding of the sector; articulate a management framework through which the sector could maximise its potential contribution to Caribbean development goals; and identify the issues that lent themselves to regional cooperative approaches.

The project began in 2000, with the support of the Government of the Kingdom of the Netherlands. Country studies were conducted in Antigua and Barbuda, the British Virgin Islands, Grenada, Martinique, Saint Lucia, St. Maarten, Saint Vincent and the Grenadines and Trinidad and Tobago. National consultations followed in four of these countries to discuss the main findings of the respective studies and to stimulate national action in support of the yachting sector. These consultations yielded significant developments in the countries where they had been held (such as in Antigua, where the Marine Trades Association rebounded after the national consultation held in May 2002).

The studies revealed that in all but one of the countries studied, direct expenditure by the yachting sector contributed more than cruise-ship tourism to national income. It was also found that yachting was largely private sector driven, and that tourism and other government officials were minimally involved in the development and management of the yachting sector. Another finding was the wide disparity among islands in the income derived from the yachting sector, with Saint Vincent and the Grenadines realising between US\$8 to US\$10 million annually, while the British Virgin Islands showed a balance of payment inflow of US\$200 million in 2001 alone. This meeting had been convened to address the implications of such findings.

The Director challenged participants to grapple with such issues as skills training and human resource development; investment promotion and marketing; customs and immigration practices; the establishment of occupational safety guidelines and standards; and standards and practices for operations at marinas, boatyards and anchorages. It was hoped that their discussions and recommendations would inform the creation of a regional framework for the ongoing development of the Caribbean yachting sector.

The representative of the Government of the Kingdom of the Netherlands, Mr Arjen van den Berg (Chargé d'Affairs, Embassy of the Netherlands) then briefly addressed the meeting, focusing on his experiences with the yachting sector in Trinidad and Tobago. Mr van den Berg argued for better outreach by the Caribbean sector so that it could realise its potential for expansion. Costs and other prohibitive factors deterred the many Europeans, for example, who wished to come to the Caribbean. Methodologies should be devised to entice such potential yachting visitors.

Furthermore, Mr van den Berg continued, the fractured approach to yachting in the Caribbean was undermining productivity within the industry. A concerted, collaborative, regional strategy would be more useful. Accordingly, the meeting should formulate an action plan, which must acknowledge the role of politicians in its execution. Mr van den Berg reaffirmed his enthusiasm for the ECLAC project and the promising role of yachting in Caribbean development.

## **Agenda Item 2: Selected national presentations**

### Antigua and Barbuda

Consultant for the Antigua and Barbuda study, Ivor Jackson, described the key characteristics of this country's yachting sector and assessed its social and economic impact. He then outlined the major issues that needed attention and suggested those strategic actions that would strengthen the sector.

Nelson's Harbour/Falmouth Harbour and Jolly Harbour Tourism Complex were the two major docking centres around which the yachting community in Antigua and Barbuda had developed. These communities were characterised by a dependence upon large yachts; a six-month yachting season, which coincided with winter in the north; and an annual influx of Antiguan and non-Antiguan migrant workers who stayed for the season and then moved on to other countries to find employment.

The economic impact of the yachting sector was evident in the EC\$75m per year that it contributed to the country's GDP and the direct expenditure of some EC\$36m. It also employed 900 persons. Yachting attracted approximately 25,000 visitors annually who contributed 4.5% of total tourism expenditure, in contrast to cruise ship arrivals, which brought in 300,000 persons but contributed only 3.1%. Businesses benefiting from the yachting sector included marina services providers, restaurants, bars, shops and brokerage firms. Alongside these advantages, however, existed such environmental problems as the sewage and other hazardous wastes emitted by yachts, diminished quality of the waters surrounding the marinas, dredging and filling from construction of these marinas, multi-user conflicts and a lack of standards for occupational health and safety.

Other concerns included low public awareness and interest in yachting; the centralised structure of the Jolly Harbour area; narrow seasonality; absence of training opportunities in yachting skills; insufficient data and poor management of what did exist; cumbersome immigration and customs procedures; the need for better visitor safety and security; and the vulnerability of Antigua to hurricanes. Recommendations were made for strategic actions at the public, private sector and technical levels that would address these concerns. It was reported that since the national consultation held in April 2002, at which these issues were discussed, the Marine Association had been revived and had developed its own Web site. Also, the Ministry of Tourism of Antigua had appointed an officer specifically for the yachting sector and convened at least two workshops on related issues; and clearance procedures had been streamlined.

Mr Jackson concluded that the maintenance of a vibrant yachting association remained key to the development of the sector. At the same time, effective promotion of yachting at the local and regional levels required attention to infrastructure and services for mega-yachts, more thoughtful product mix and diversification among the various islands, a phased programme for the implementation of environmental standards, and the marketing of the Caribbean as the premier yachting destination in the world.

## St. Maarten

Robbie Ferron, the consultant for the St. Maarten study, reported on the main characteristics of the St. Maarten yachting sector and gave a brief history of its development. He also assessed its economic and environmental impact, commented on the role of the public sector and then outlined the major concerns that needed attention.

The yachting sector had burgeoned since 1980, developing around a large lagoon area, which provided protection for yachts in its many anchorages. The phenomenal growth of yachting over a relatively short period was attributable to the French government's defiscalization policies, which had led to disproportionate investment in the yachting industry. Nonetheless, local involvement (including employment) in yachting remained at a low level despite the rapid population growth in St. Maarten over the previous decade. Indeed the marine sector was not recognised as a major contributor to the economy, meaning that few statistics on the industry existed (and making data collection for this project difficult).

Yachting and marine activities were characterised by a growing interest in super-yachts in recent years, seasonality (owing to the prevalence of hurricanes) and an emphasis on offering services and supplies rather than on cruising.

The economic impact of the sector was difficult to gauge because of the low correlation between the number of yachts docking in St. Maarten and the level of expenditure by their crews. Accordingly, the methodology applied used a factor obtained from another survey. The study's economic impact analysis took into consideration the difference in spending levels between regular-sized and mega yachts.

With regard to environmental concerns, Mr Ferron noted that while the main anchorage was located in one of the better-flushed points in the lagoon, other mooring areas were not as clean. Accordingly, the practice among yachts of pumping effluents into coastal waters remained a problem. There was also the need for legislation that would ban or at least regulate the use of anti-fouling paint. Additionally, dredging for marina construction and facilities was not structured and has led to multi-user conflicts and coastal erosion.

The administration of yachting seemed deficient. No one person had been assigned within the public sector to address marine trades; appointing an expert in this field might be the most productive route. While there were far fewer problems with customs procedures in St. Maarten than in other islands, confusion resulted when Port Authority rules that had been originally intended for ships were applied to yachts. Within the private sector, there was little collaboration with the tourism industry, even for the planning of large regatta events. Nonetheless, in spite of these problems, the sector had benefited from the efforts of the Marine Trade Association, which had helped to raise the profile of yachting and bring the sector's concerns to the attention of government.

Mr. Ferron then summarised the main issues that should be addressed. Primary among these was the marked seasonality of yachting in St. Maarten, which undermined the stability of the sector since long-term employment could not be guaranteed. Other concerns included the

lack of skilled local labour; low involvement by the public sector in the industry; the need for better marketing of the yachting product and improvement of its public image; and the need to structure the industry to cater for the type of clientele that visited the island.

### Saint Lucia

Cuthbert Didier reported on his country study of Saint Lucia. Mr. Didier gave an overview of yachting in Saint Lucia and then discussed the main problems that plagued the sector. His presentation concluded with recommendations for further development.

Yachting in Saint Lucia contributed some EC\$42.8m towards the GDP and had contributed to the creation of some 450 jobs. Most of the yacht visitors were from Europe (63%) and the United States (25%) with others coming from the South American continent. Visitor expenditure was concentrated in the marina and related services, food and entertainment, and duty free shopping markets. The total minimum direct impact on the country's economy was EC\$72.64m.

Yacht visitors were attracted to Saint Lucia's physical location; such facilities as storage and marina services; regattas and vacation/pleasure yachting; and such events as Carnival and the Saint Lucia Jazz Festival. Nonetheless, while the traditional tourism sector was built around similar attractions, yachting was not regarded as a tourism project.

The main stakeholders included government agencies and departments; hotel and tourism associations; the yachting association; day-boat charter services; and the fisheries sector. However, the role of each of these actors in the development of the sector had not been properly defined. In addition, user-conflicts between yachtspersons and other users of the marine environment had emerged, caused by discharge of sewage and waste water into harbours, indiscriminate solid waste dumping, unauthorised coastal developments, illegal fishing, close-shore anchoring, poorly enforced laws and standards, loosely demarcated coastal areas for mooring, and physical damage by reef diving and anchoring.

Crime, inadequate security, bureaucratic obstacles, and the risk of injury due to improper infrastructure were among the major concerns of the yachting sector. Adequate mooring facilities; sufficient skilled labour and services; an improved public image; proper human waste and oil disposal facilities; and stronger law enforcement were urgently required.

Attention should also be paid to human resource development, since training in the skills required by the yachting industry was mostly unavailable. Existing staff passed on their skills to newer employees, and thereby constituted the major training support facility. In addition, few people were employed within the hierarchical structure of existing organizations, while many individual workers performed dual roles. To address these inadequacies, the yachting sector should try to foster greater local involvement in the sector through policies that encouraged yachtspersons to visit, promised career opportunities and development within the sector, educated the public on the yachting sector, unified national and international marine services, and emphasised customer service.

Within the public sector, the “customs and immigration challenge”, which was characterised by officials who seemed hostile and suspicious of the intentions of yacht visitors, had traditionally been difficult to overcome. Little guidance was forthcoming on the allowed length of visiting periods and the availability of extensions; and the procedure for obtaining such extensions when required was long and tedious. Yacht visitors were not made to feel welcome, neither were they encouraged to extend their visits on the island. Nonetheless, in other areas, the government had shown some commitment to assisting the sector. It had introduced such measures as removal of import duties on supplies, the establishment of duty-free (and hassle-free) waterfront fuel depots (*Chandleries*), easier importation of yachts for charter companies and locals, tax holidays for marina and other water-based tourism development, and a facility for the duty-free importation of spares by tour and charter yachts.

Additional recommendations for strengthening the sector included increased local education on the yachting sector, the removal or simplification of bureaucratic procedures required for duty-free import and clearance of yacht equipment, greater involvement of tourism officials in the promotion of yachting, and investment in the improvement and maintenance of marina infrastructure and security.

### Martinique

Mr Didier also reported on Martinique. He gave a brief outline of the industry, its seasonality and the peculiar economic arrangements that underpinned its development.

He noted that unlike the trend in cruise and stay-over visitors, the number of yachting visitors to Martinique continued to increase. Marked seasonality characterised yachting patterns in Martinique, with February and March being peak months and the slowest period extending from September to October. The average yachtsperson spent over two weeks. Most charter boats were monohull sailboats and there existed about 120 anchorages, which offered a variety of services.

The phenomenal growth in the Martiniquan yachting sector was attributed to an official “defiscalisation” policy, which provided government incentives to investors. Annual yachting expenditure was US\$7.8m, compared to approximately US\$4.5m spent by cruise passengers. Furthermore, among its distinguishing characteristics, Martinique functioned as a starting point for yachts that were bound for the more southerly Caribbean, with 63% of the yachts that arrived in Martinique visiting the Grenadines.

### Grenada, Carriacou and Petit Martinique

Ivor Jackson and Cuthbert Didier prepared the country study for these islands. Mr. Jackson presented the report on this study, which noted that the potential of the yachting industry for expansion was being frustrated by institutional, infrastructural and environmental problems, as well as poor health and safety practices.



The attractiveness of Grenada, Carriacou and Petit Martinique was attributable to their optimum physical location (making them vulnerable to few hurricanes), a tradition of boat building, and the festivals and regattas that they hosted.

Yachtspersons moored at Hillsborough, Prickly Bay, or one of the other four ports of entry, and stayed, on average, 21 days. Most came during the high season, which extended from January to March. The yachting community consisted mostly of live-aboards (60%), with the other part comprising cruisers (30%) and locally based charter yachts (10%). Expenditure by the yachting community was estimated at more than EC\$36m compared to cruise ships tourism, which yielded just over EC\$7m. The yachting sector employed approximately 250 persons.

Among the main environmental concerns, were the improper disposal of waste oil, domestic and boat wastes; and anchor damage caused by improper anchoring practices or a lack of anchorages. Occupational health and safety concerns included the use of toxic paints and the unnecessary risks that workers were exposed to when the appropriate equipment was unavailable (or, when actually provided, simply not used). In order to address these and related environmental problems, standards governing design and engineering of marinas, spray painting and disposal of washings, sewage disposal, storage and disposal of waste oil, fire safety, and fuel storage and dispensation should be established and enforced.

Since these islands were located outside the hurricane belt, little attention had been paid to disaster preparedness plans, and few existed. This left boatyards vulnerable to storm surges and floods.

The most pressing institutional issues were related to a hostile investment climate in which, over a ten-year period, corporate tax exemptions were allowed only to those marinas with a hotel attached – though duty exemptions on importation of yacht and ship stores did exist. This study also considered the organizational capacity of the marine associations, which had small memberships, relied too heavily on voluntary labour, and had relatively low membership fees; it noted that such arrangements were unsustainable in the long term. Furthermore, the associations were not represented on the Grenadian Tourism Board and there was no institutional structure through which marketing of the destination as a yachting attraction could be channelled.

Among the structural weaknesses that existed within the industry itself were a poorly managed visitor database, lack of a dedicated megayacht facility, undeveloped berthing and visitor structure in Carriacou, an inadequate system for anchoring and mooring in environmentally sensitive areas and a limited capacity for managing marine resources.

In light of these observations, Mr. Jackson recommended the development of a strategic plan that would address the following: encouraging investment in the yachting sector; developing mechanisms that would effectively represent to policy makers private sector interests with respect to environmental and industry standards; disaster mitigation and planning for the yachting sector; customer service training for customs and immigration officials; policy guidelines on trading from live-aboard yachts; needs assessments on skills and training necessary for the sector, a paid full-time head for the marine association; and the establishment of procedures for Environmental Impact Assessments (EIAs) and environmental audits.

## Saint Vincent and the Grenadines

Tom van't Hof, consultant for the Saint Vincent and the Grenadines country study, made this presentation. According to Mr. van't Hof, the numerous cays, the annual whale migrations and the pristine waters of these islands made them a natural attraction for yachts. However, their incapacity to handle the influx of yachting traffic had created related (security, environmental and institutional) problems that needed attention.

The main yachting centres were Villa/Calliqua, Bequia and Union Island. Bequia and Union Island were very dependent on this sector since more than 60% of their tourists were yacht visitors.

The structure of the Saint Vincent and the Grenadines yachting sector included seven charter companies, six marinas and one shipyard; one boat building and repair facility; and less than 100 charter yachts. There were 10 anchorages, with two ports of entry on the mainland and three in the Grenadines. While data on the yachting sector was inadequate, it had been estimated that over 113,000 yacht visitors had come to the islands in 2000. Similarly, the overall economic impact could not be easily measured, but was estimated at over US\$10, which was significantly below its potential earning capacity.

At any given point, about 100 persons were permanently or directly (and twice as many indirectly) employed in the sector. Workers with managerial and technical skills were not usually available locally; most of the persons who were working in the sector had acquired their skills through on-the-job training.

Inadequate facilities for solid and liquid waste disposal, insufficient mooring sites, security problems, and difficulty in obtaining duty free parts and supplies were among the constraints suffered by the sector. Other problems included harassment by "boat boys"; double charging for moorings; cultural conflicts; clashes between yachtspersons and fishermen; and the yachts that avoided customs and immigration clearance. Overcrowding at certain anchorages, the incompatibility of cruise and yacht tourism, and the marked seasonality in yacht arrivals also undermined the economic strength of the sector.

In order to overcome these problems, Mr. van't Hof identified the need for improvements in aircraft access to the islands; the development of a zoning system in the coastal areas for yacht moorings; proper data collection and a policy to increase competitiveness of the industry. To this end, the following recommendations were made:

- Improvement in the data collection system (tourism, economics)
- Attention to such planning issues as carrying capacity and zoning
- Development of strategies to minimize negative environmental impacts
- Stronger law enforcement and improved security
- Simplification of clearance procedures and increased duty free concessions
- Expansion of services and facilities
- Policies that would foster institutional development of the sector

## Trinidad and Tobago

Erik Blommestein, of the ECLAC Subregional Headquarters for the Caribbean, presented the yachting study on Trinidad and Tobago. This country's sector, which was based in Trinidad, specialised in the servicing of yachts. Its development was being hampered by a lack of diversification of markets and the location of the main yachting centre in a marine industrial area.

Most yachting activities were concentrated in the Chaguaramas area, along the north-west peninsula of Trinidad. The sector was located within an industrial enclave that offered marine services and which, over a decade, had developed from a relative backwater to a yachting centre.

The rapid development of the industry was could be attributed to the island's reputation for the hospitality of its locals, competitive prices, a skilled labour force, supportive customs and immigration departments, and private sector investment. The country's physical location below the hurricane belt, the ease with which duty free parts could be imported, and the relatively low cost of living had also contributed to the rapid development of the sector.

The peninsula serviced a wide range of sailing vessels, but the yachts that were most prevalent were those less than 40 feet in length. There was some seasonality to the yacht arrivals with many of them coming during the hurricane season and Carnival season (the early part of the year). The sector employed at least 1100 people and appeared to generate some TT\$100m within the economy, however, standards would have to be elevated and further training at the national, regional and international levels provided in order to maintain competitiveness

Other concerns included an underdeveloped recreational yachting sector, lack of data, security issues, maintaining a competitive edge, multi-user conflicts and conflicts for land acquisition and use. It was recommended, therefore, that training opportunities be identified, appropriate property management practices (for example, those relating to water use) be implemented, proper data collection systems be installed and maintained, the recreational yachting sector be developed and more open spaces be made available for yachtspeople to enjoy.

### **Agenda item: 3 Discussion session**

During the discussion session, the following issues were raised:

It was argued that the major challenge facing the sector was to get governments to address yachting issues in a coordinated way, by supporting a strategic plan and identifying specific agencies or offices that would be assigned responsibility for this portfolio. The Director of the ECLAC Subregional Headquarters for the Caribbean agreed, but added that problems should be addressed at a regional level and within a set time-frame. In response to an inquiry about the limited scope of the project, the Director explained that economic constraints prevented the inclusion of more islands with yachting industries.

With respect to the facilities in St. Maarten, it was pointed out that studies addressing such concerns as the movement of water or flushing time of marinas would be of immense value to the yachting sector, which was often accused of polluting near-shore waters.

One participant was concerned that the suggested expansion of yachting facilities throughout Antigua might imply a wider distribution of environmental damage. In reply, it was pointed out that such expansion would serve to extend economic benefits to other communities and not necessarily spread environmental problems.

Participants discussed the benefits and disadvantages attending liveaboard (a person living on a yacht) communities, as well as related concerns about whether this practice should be encouraged. It was noted that in some areas, liveaboards provided much needed skills and services to the marinas but when unsupervised, could cause problems because of lack of sufficient anchorages. Occupants might also buy property but not pay the requisite taxes; and they might contribute disproportionately to pollution in the nearshore area (more than megayachts, for example). With respect to this concern about water quality, however, it was pointed out that tin paint was much more deadly to marine life than the sewage disposal problems caused by liveaboards.

The meeting was informed of initiatives taking place in respective countries to deal with problems within the maritime sector. These included the establishment of marine departments within certain government ministries; and the formulation of the *Caribbean Sea proposal* (which seeks recognition of these waters as a special zone with respect to the activities that may be permitted within its boundaries), that was before the United Nations General Assembly. In addition, some governments were trying to accede to marine conventions and in the Organisation of Eastern Caribbean States (OECS), new Fisheries Legislation was being promulgated.

The Port Authority in each island, from which many expected help, had been designed to facilitate ships rather than yachts; to address this concern, the International Maritime Organization (IMO) had convened a "standards for yachts" workshop a few years before, though poor follow-up had stunted that initiative. The problem of scattered legislation also needed to be addressed and Grenada had promulgated an act dealing specifically with yachting. Accordingly, it was suggested that the establishment of a yachting co-ordinating agency might be needed in some countries.

With respect to training, there was need for a structured apprenticeship programme that would provide requisite, recognised training to those individuals who wished to develop skills for employment within the yachting sector. The need for formal qualification had assumed greater importance, as more "high-end" technology was being used on boats.

Since many yachting destinations were distinguished by their physical features or services, it might be feasible to market the Caribbean region as a yachting destination. To do this successfully, the private sector would have to raise general awareness of and interest in yachting. Also, the yachting sector should associate itself with the many marine institutions that were emerging throughout Caribbean in order to mobilise support for its internal development. The point was also made that marketing activities must be supported by maintenance of facilities

since the sector might prove to be unsustainable in the long term if visitor expectations were not met.

The meeting also agreed that a useful strategy would be to identify local and regional initiatives and build on those rather than duplicate efforts already being undertaken. One such initiative would be the creation of a strong yachting association, which could focus on developing the sector and which might attract political attention.

#### **Agenda item: 4** **Regional overview**

Based on the findings of the country studies, the Director, Ms. Len Ishmael, gave an overview of the yachting sector in the Caribbean, examining the peculiarities of the yachting centres, common problems and possibilities for collaboration within a regional context.

Ms. Ishmael outlined some of the unique elements of each Caribbean yachting centre and pointed out that these specific features allowed for product differentiation among the islands. She noted that the British Virgin Islands was distinguished by its water quality, infrastructure and services; St. Maarten by its services and proximity to Anguilla and St. Barths; Antigua by its mega-yacht facility and events; Martinique by its proximity to the Grenadines; Saint Lucia as a point between the north and south Caribbean; Saint Vincent by the quality of its water, the anchorages and the closeness of Grenada to the Grenadines; and that Trinidad offered storage, maintenance and serviced yachts.

She noted the seasonality of most yachting centres, and highlighted the similarities and sometimes large differences with respect to the type of vessels, number of persons employed in the industry, the number of yachting visits and the income generated by the yachting sector. The skills and services both present and lacking in the Caribbean were also mentioned.

There existed a type of skills dilemma created when skills needed within the yachting sector were not being transferred among islands. In St. Maarten, a liberal work permit system allowed many foreigners to enter the work force, at the expense of the development of a local skills pool; in Antigua and Barbuda, the locals had to seek employment outside of the Caribbean during the low season, because of work permit restrictions in other Caribbean islands. There was need for greater communication between the private sector and the government to assist in the resolution of this issue.

Sharing knowledge of best practices was also needed for the development of the sector throughout the subregion. Examples of such practices included the Marine Task Force and Marine Police system in Saint Vincent and the Grenadines; the public/private sector mechanisms in Antigua and Barbuda; and the strong interface of the Marine Services with the government and the relationship between the Tourism Ministry and the yachting sector in Saint Lucia.

As regards data, there were already data sources that were not maximally exploited and these should be utilised fully before embarking upon the devising of new data systems which

would necessarily require more resources; the data gaps needed to be identified so that the data collection could be specific and targeted.

Environmental issues could be confronted with the help of regional institutions, for example, the Caribbean Environmental Health Institute (CEHI), the Institute of Marine Affairs (IMA), regional initiatives and regional discussion forums which would prove to be more useful than islands attempting to tackle what were basically the same problems, on an individual basis.

In conclusion, the outstanding issues that needed to be confronted at a regional level included health and safety of workers, training (availability of skills, skills assessment), the seasonality of most yachting centres, data insufficiency (especially with respect to assessing of impacts), lack of standards and practices, high or non existent insurance schemes, the need for institutional reform to break through bureaucratic barriers and the provision of value for money for the yachting enthusiasts.

### **Agenda item 5**

#### **Panel discussion: Post national consultation advances**

##### British Virgin Islands

The representative of the British Virgin Islands' yachting association indicated some of the safety measures that had been instituted for yachts, including hurricane berths in the mangrove lagoon areas, which are well marked. There was also a system of overnight moorings.

As regards environmental protection, there were no legal regulations as such, but yachts were allowed to discharge no less than 1000 yds from the shoreline and it seemed to have no ill effects on the marine environment. There was also a government incinerator that was able to collect and dispose of solid wastes.

##### Antigua and Barbuda

Following from the national consultation on yachting, four groups had been formed with input from the public sector. These were linked to government departments, customs, immigration, national parks and the port authority. The customs systems and the regulations concerning importation of parts and related clearance had been streamlined and were now very efficient. The government maintained constant contact with the yachting association and there had been concerted efforts to facilitate the sector.

##### Saint Lucia

Due to overtures and lobbying from the private sector, Cabinet had issued an administrative order with respect to yachting and there was now an officer in the tourism ministry with responsibility for yachting issues. In addition, there were regular meetings with government officers in ministries whose administrative duties impacted on the yachting sector.

The major issue identified after the national consultation had been the water quality at the Rodney Bay area and approaches were being devised to examine the issue.

A collaborative approach had been taken since input from both the government and private sectors were necessary to manage the industry properly. The Youth Training Club also had a programme that outlined the process whereby government officers could be contacted or approached. A three-tiered system had been implemented based on the characteristics of the particular vessel.

There was a problem in Saint Lucia to get the locals who had day boat charters to join with the other charter yachts, since the latter were considered expatriate outsiders.

### Trinidad and Tobago

The representative of the Yacht Services Association of Trinidad and Tobago (YSATT) discussed the formation of the Marine Association of the Caribbean (MAC) which had been created some years before to address yachting problems in the region. The Association had become relatively inactive due to its high reliance on volunteers, inadequate funding and lack of communication among members. The objectives of MAC included the conservation of marine natural resources, education for members and related groups, dissemination of information among members, promotion of nautical tourism and lobbying for legislation that would advance these aims and support boating facilities. The membership structure of MAC was also discussed.

These contributions prompted other suggestions such as the use of the Internet to better facilitate processing inquiries by yachterspersons. This method could also be used to provide general clearance for all the islands to be visited by a yachtsperson, and to eliminate the time delay experienced by yachts, for payment of customs taxes.

To get the attention of governments, it was necessary to emphasize the economic benefits to be derived from the yachting sector, especially the fact that most of the money generated remained in the country. This was not the case with cruise ship tourism, which brought increasingly fewer people each year.

## **Agenda item 6**

### **Working groups**

In attempting to devise a regional strategy for the yachting industry, the participants were divided into five working groups which dealt with, respectively: institutional development (customs/immigration; private/public sector); training and human resource development; research and data management; investment and marketing; and practices and standards for marinas and boatyards. The groups were mandated to:

- Concentrate on regional/national issues that had regional implications;
- Identify the issues that would benefit from regional collaboration, as well as: (i) the critical players in such a collaboration; (ii) the actions that could be taken and by whom; and (iii) steps, mechanisms and resources that would be required;

- Describe any specific actions or support that ECLAC should undertake as a follow-up to these initiatives.

### **Institutional development - Customs/immigration; private/public sector**

This group advocated the establishment of a MAC, and recommended that membership should comprise representatives of marine associations of each island, rather than individual marinas or other yachting establishments, as this would make the Association unwieldy. They also suggested that a regional office be established and that the issue of reform of bureaucratic procedures should be included in the main programme areas of MAC. For the benefit of the yachting sector, though, data standardisation was essential for it to grow within the Caribbean.

#### ***Customs/Immigration***

Under this heading suggestions were made for the following: (a) having a standardised entry form for the Caribbean region as well as standardised administration fees; (b) verification of the length of stay allowed in each country so as to avoid requests for extensions of stay; (c) ports of entry need to be more accommodating, considerate and allow for some conveniences for visitors, at the same time bearing in mind the limited resources of the Caribbean States; and (d) the simplification of the procedures for the importation of goods for yachts and services.

#### ***Safety and security***

It was felt that with the present world focus on security, the Caribbean could be promoted as a safe cruising area and more stringent law enforcement measures should be adopted with respect to drugs. Further suggestions include the licensing of "boat boys", safety standards for marinas especially with respect to fire fighting and occupational hazards, coordinated search and rescue operations throughout the Caribbean and proper hurricane planning with zones for boats of shallow and deep drafts and clearly designated mooring sites.

#### ***Investment opportunities***

There was a need to improve the image of the industry to make it more appealing especially to local investment. Equitable treatment as far as investment incentives were concerned, as are enjoyed by other establishments in the tourist industry, should be meted out to yachting establishments.

#### ***Environmental***

The following suggestions were made: the problem of waste disposal and other environmental issues need to be handled within an institutional construct; there must be facilitative bodies for the resolution of multi-user conflicts; control must be enforced at anchoring and mooring facilities; there should be regular testing of water quality to detect problems at an early stage; reef areas should be properly marked for their protection; and the



impacts of rules designed for ports and fisheries in the yachting sector should be examined with variations being made, if necessary, for sail craft.

### ***Public sector***

The installation of yachting liaison officers should be high on the agenda and they should be networked throughout the Caribbean. There should also be representation of the yachting sector at the level of the Caribbean Tourism Organization (CTO).

Other recommendations included requesting the assistance of ECLAC to facilitate the re-establishment of MAC by hosting and funding the Association's inaugural meeting, and by helping to identify other sources of income. Assistance was also requested to support the establishment of Marine Trade Associations (MTAs) in Caribbean countries where they did not already exist.

As far as possible ECLAC should conduct further research into the environmental impact of yachting (such as through water quality assessments).

Other regional agencies that could assist in the development of the yachting sector in the Caribbean included the Caribbean Epidemiology Centre (CAREC), the National Resource Management Unit (NRMU), CTO, Organization of American States (OAS), and the Caribbean Conservation Association (CCA).

### **Training and human resources development**

Issues that were considered to be pressing under this heading were the description of the yachting sector as one that was only for rich expatriates; the need for more direct government recognition and support of the sector; training facilities for the provision of specialised skills required in the industry; the lack of general knowledge concerning what regional resources were available for such training; the unavailability of a training module for yachting; and the general lack of affinity of the populace with boating and its services. Training for customer service orientation should also be mandatory for those persons who interact directly with the yachtspersons.

Suggestions for dealing with the public perception included the publishing of success stories via the press and local trade associations; the inclusion of aspects of yachting and sea skills in schools; the promotion of national awards for companies or individuals in the sector; a re-branding of the industry e.g. as leisure marine; and media sensitisation to the happenings in the industry.

The yachting community also needed to form alliances with similar clubs e.g swim clubs; promote community projects and works; and work alongside other businesses (e.g. in the Chambers of Commerce).

With regard to customer service, it was necessary to source a relevant training service that would assist workers in the industry and would promote greater sensitivity to yacht people. In addition, a programme or academic module specific to the yachting sector needed to be developed with the assistance of ECLAC, the United Nations Educational, Scientific and Cultural Organization (UNESCO) or some other similar agency. Areas of training would include:

- general principles of customer service; and
- developing a positive work ethic

Such training should be ongoing since people were always joining the industry and those who were already there would need periodical refreshers. If this training were consistent, then all groups could benefit from it (not only those providing direct yachting services but also those in related fields such as customs and immigration officials).

To deal with those situations and generate requisite skills, an orientation programme for those interested in the yachting sector would be useful, whereby the person could graduate to higher levels in mechanics, woodwork and other such needed skills: management principles should also be a part of this programme. The type of module, which included practical work, could be fashioned after those conducted by the hotel and tourism schools, which could function as suitable prototypes. It was revealed that the College of the British Virgin Islands had a similar programme and technical institutes could also vary their mechanics programmes to include marine craft. Other institutions included Samuel College in Barbados and the Caribbean Marine Institute in Jamaica. An appropriate United Nations agency could probably facilitate the retention of an expert to advise on a training module.

The transfer of skills via the exchange of workers from different States should also be considered. This would require the easing up of work permit restrictions, and the development of regional apprenticeship programmes; in addition, the use of the skills of retirees within the industry, in management and in other areas could prove to be quite useful. Embassies and High Commissions could also offer assistance in that respect.

To successfully implement these measures, an Action Plan should be drawn up which would prioritise and clearly enunciate the directions and time-frames required to fulfil these activities. The MAC should be an integral part of this Action Plan.

## **Research and data management**

The principal objectives were to:

- a. Increase understanding of the industry throughout the region;
- b. Inform decision-making in the short, medium and long terms (impact on national policy formulation and macroeconomic planning).

In considering this topic the first question that was asked was who were the users of the data for the yachting industry? The main users were believed to be government planners, the

private sector, regional and international institutions, industry, researchers and the public at large. The type of data needed by each sector was different. However, the sources of such data were identified as customs, port authority, immigration, marina operators, sailing and yachting associations and charter boat companies. Some of this data was already present in immigration offices, yachting clearance forms, ships' manifests and research surveys.

The main challenges to be overcome were the lack of use of common industry-wide definitions; the identification of the type of information necessary; the standardisation and classification of yachts and passengers; the development of a list of variables necessary to build a regional database and the sustainability of such a database.

As regards the involvement of ECLAC, the institution could assist in the standardisation of definitions and collections by helping to establish focal points in each island. The local statistical offices and the tourism boards could work at the local level to ensure compliance. The standardisation of definitions would be in keeping with international guidelines. A suggestion was also made that the CTO, supported by ECLAC, should be the regional focal point for dissemination and information. Research institutions should be requested to conduct surveys on various aspects of the yachting industry in accordance with their capability.

### **Investment and marketing**

This group suggested the use of slogans which identified the regionality of the marine product, such as "together we achieve, many islands, one sea".

The objective as the group saw it, was the sustainable growth of the yachting sector through regional collaboration. The critical players in this thrust were divided into the "public", such as ECLAC and member States, the Caribbean Community (CARICOM) and the OECS; and the "private" players such as regional organizations like the CTO and other non-governmental interests.

The public players were responsible for policy implementation in the Action Plan, an example being the standardisation of customs forms. Incentive regimes, project identification and funding, as well as assistance in trend analysis and data collection would also be expected from the public sector. There should be a series of "integrated partnerships" whereby island clusters e.g. St. Maarten and Martinique would be grouped together.

One of the roles of the private sector would be to upgrade MAC to include marketing (trade shows, questionnaires, surveys, media), awareness promotion and utilise it as a vehicle for facilitation of investment and promotion of yachting generally. A website should be designed which would give common clearance procedures in the Caribbean, standards to be adhered to, carrying capacity of anchorages and moorings, services, an events calendar, and each member State would have an e-link from the website.

The assistance of ECLAC would be solicited to lobby governments and to assist in directing where funds might be accessed from various projects and programmes.

## **Practices and standards for marinas and boatyards**

The group saw the practices and standards as being in the first instance, those which offered guidelines, rather than dictated the law. Standards should be viewed as best management practices. The various areas in which standards were necessary were elaborated as being:

**Fuel:** Whereby auto shut-off valves would be mandatory on fuel dispensers and fuel stations would have oil absorbent pads and materials.

**Boat cleaning:** The introduction of dust-free sanders, use of closed system pressure washes with collection of solid waste residue, containment for dust/paint overspray, collection of liquid and solid wastes and disposal of the wastes to an appropriate site.

**Sewage:** Marinas to provide on-site treatment systems and pump-out facilities for those vessels with holding tanks; to encourage the use of on-shore toilet facilities and use regional organizations to provide information on treatment systems.

**Antifouling:** Discouraging the use of TBT (Tetra butyl tin) antifoulants, the collection of antifouling wash-off residues and disposal at an appropriate site, and the collection and recycling of waste water from pressure washings.

**Occupational health and safety:** Promoting the protection of all users against hazardous wastes, dust and toxins by the use of masks, gloves and protective clothing. On Guidelines for Proper Practices at Anchorages, it was suggested that governments be approached to assist in funding or subsidising permanent moorings in sensitive areas and accepted anchorages, in collaboration with local authorities to designate "no anchoring zones" and dissemination of information to boats on "no Anchoring" zones.

**Waste:** Marinas should encourage all boats to pump sewage at a minimum of 1000 yards from shore, when better cannot be done and apply MARPOL regulations which relate to the dumping from ships at sea.

With regard to coral reef protection, the United Nations Environment Programme (UNEP) guidelines for coral reef awareness in marine tourism could be used.

As far as implementation was concerned, a primary objective would be the revitalisation of MAC via provision of relevant resources and making it into an effective mechanism for regional collaboration and the consideration of a rating system or certification for marinas for the benefit of visitors.

### **Agenda item: 7** **Closure**

A closing discussion followed during which the following comments were made:

The Director of the ECLAC Subregional Headquarters for the Caribbean commented on the prospective role of ECLAC as proposed by the working groups. She emphasized that ECLAC was not a funding organization and, as such, could not provide funding for the establishment of MAC. Nonetheless, it could support a project like MAC by providing the technical expertise and by helping to identify the resources for fundamental tools. Accordingly, ECLAC could assist in the establishment of a regional database (for the yachting sector) of the contact and resource information that would be the cornerstone of a regulatory, coordinating body such as MAC. Indeed, ECLAC had recently established this type of database for both trade and social statistics. Once such a database was set up, responsibility for its maintenance would be passed on to an organization such as MAC or the CTO.

Since ECLAC had its own Web site, it could create a site for the yachting sector as a hub for its activities and to allow it to remain connected. When a regulatory/coordinating entity (like MAC, perhaps) was established, it could take over the running of the site. Meanwhile ECLAC was planning a workshop in 2003 on standards and practices for boatyards.

As far as methodology was concerned, there was need to identify a methodological approach for assessing yachting. ECLAC was planning a workshop for statisticians in tourism, to be held in March 2003, and its subject matter would be extended to include the yachting sector. ECLAC would also be able to assist in the standardisation of survey instruments for use in each country, for example, in assessing events.

Since research was the primary activity of ECLAC, functioning as it did as a regional think-tank, at the research level, therefore, there might be room for involvement in some of the research projects identified as necessary, for the yachting sector. In addition, the role of ECLAC as secretariat for the Caribbean Development and Cooperation Committee (CDCC), a political body formed to promote the Caribbean perspective within the United Nations, and for the Small Islands Developing States Programme of Action (SIDS POA) meant that it was positioned to lobby at the highest levels on behalf of the yachting sector.

It was stressed that it would be important for the working groups to maintain the momentum generated from this meeting, which could then permeate the larger yachting community. In collaboration with this, the re-establishment of MAC and its funding must be properly addressed before this body could fulfil all the responsibilities identified for it by the meeting. Initial funding for its establishment might be procured, but finding the means for the organization's self-sustenance, in perpetuity, would be equally important. It might be advisable to start small; establish what could be done at present and then find the means to grow. If the sector waited for certain activities to begin or be implemented before starting MAC, the organization might never get off the ground.

With regard to environmental matters, especially in the area of recycling, ECLAC could assist in undertaking a needs assessment, but would need the input of the industry itself, since ECLAC had no expertise in developing training material or systems for such.

Other comments from the floor included the idea that the yachting sector could draw on the experience of the College of Applied Science and Technology (CAST) in Jamaica, while ECLAC could advise on potential sources that might be approached for funding. It was felt that a project on best practices in the yachting industry might actually be fundable under the Global Environment Fund (GEF) programme.

On the issue of the next step, it was reiterated that there was a need to sustain the momentum generated at this meeting; it appeared that all participants supported the development of MAC and thus that organization could be re-established by those islands that already had trade associations (MTAs). The appeal to ECLAC was not to undertake funding of the MAC, but to advise on potential sources that could generate seed money to invigorate MAC.

While there was concurrence on the necessity for MAC, its effectiveness depended on the ongoing support of the national associations. Ensuring that this support existed was critical to the success of the MAC project. To build momentum, a useful approach would be to identify a few high priority items and tackle these initially, instead of trying to do too much too soon and burning out early.

The ECLAC Director thanked participants for their attendance and contribution to the success of the meeting.

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