A REVIEW OF THE DEVELOPMENT OF THE TRANSPORT SYSTEM IN THE CARIBBEAN WITH REFERENCE TO THE ESTABLISHMENT OF REGIONAL INSTITUTIONS AND THE INVOLVEMENT OF AID DONORS

Paper presented to the INTAL Symposium on Transportation Buenos Aires, Argentina, 1 June 1983

by

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INTRODUCTION

This paper reviews the development of the existing transport system in the Caribbean. It defines the area under consideration and then provides an historical perspective on the formation of the regional institutions, the presence of the Economic Commission for Latin America and the formation of the Caribbean Development and Co-operation Committee.

There follows a description of the existing pattern of services and the attendant infrastructure in the aviation and maritime sectors.

Estimates are given on the volume of imports and exports in the Caribbean by broad commodity groups.

Finally, there is a description of the transport activities undertaken in the Caribbean both by the Caribbean Group for Co-operation in Economic Development and by the CDCC.

There is a set of statistical tables to support the text.
1. DESCRIPTION OF THE CARIBBEAN REGION

The Caribbean is a term that has many definitions. At its broadest it is the area of land around the Gulf of Mexico and the Caribbean Sea separated from the Atlantic Ocean by the Bahamas Islands, and the Greater and Lesser Antilles. Thus its northern boundary is the North American Continent, its western boundary is Central America, its southern boundary is South America and its eastern boundary is the Atlantic Ocean.

However, that is not the definition that this paper will use. Transportation links rarely conform to political boundaries. This paper therefore attempts to deal with a Caribbean Transport System area. The mainland areas will be excluded with the exception of Belize in Central America, and Guyana, French Guiana and Suriname in South America. These countries have a separate cultural and economic heritage from their neighbours on the continental land mass with few surface transportation links.

The Caribbean so defined consists of the twenty-five countries and territories given in Table 1. Fifteen of these are fully independent with St. Kitts/Nevis due to attain that status in September 1983, eight are either colonies of Britain or Dependent Territories of the United States and the Netherlands, while the French Antilles comprising the islands of Guadeloupe, Martinique and French Guiana are French Overseas Departments.

The largest country by area is Guyana with 215,000 square kilometres; the smallest in Anguilla with 91 square kilometres. Cuba has the largest population with 9.5 million, while the Turks and Caicos is the smallest with 6.0 thousand.

The total land area is 731 thousand square kilometres and the total population is 28.7 million.

When St. Kitts-Nevis attains independence in September 1983, it will become the sixteenth member of the United Nations from the Caribbean. It should be noted that Central and South America have 17 members between them.
The Caribbean was colonized by four powers: Spain, France, the Netherlands and Britain. This diverse heritage still clearly influences the region as will be shown later in the description of air services. States from a similar heritage maintain strong transport links between themselves and to the former metropolitan power. Former territories from a different heritage have much weaker links. It is often not possible to travel between states from a different heritage in the Caribbean without either making inconvenient connexions, or in the extreme cases, of having to stop overnight en route.

2. AN HISTORICAL PERSPECTIVE OF INTEGRATION IN THE CARIBBEAN, THE ESTABLISHMENT OF THE REGIONAL INSTITUTIONS AND THE ECLA PRESENCE

"The idea of integration or federation predates World War II. It arose out of frustration with the slow progress of democracy under colonialism. Federalism was initially fostered by contacts among trade unionists and was seen as a vehicle for developing more democratic institutions. A parallel and reinforcing movement was that of local independence, which became feasible once India and Ghana had provided the precedents. During the 1950's, the movement towards local autonomy advanced faster than that of federalism among the larger British possessions in the Caribbean. By the time of its establishment in 1958, therefore, the West Indies Federation was no longer viewed as a necessary instrument of reform. Indeed, the Federation had built-in 'self-destruct' features, the most important of which was its lack of power to tax. When Jamaica withdrew in 1962, following a negative referendum vote, the Federation fell apart.\(^1\) Independence was achieved in 1962 by Jamaica and by Trinidad and Tobago, and in 1966 by Guyana and Barbados. With the break-up of the Federation, the renowned West Indian economist, Sir Arthur Lewis, attempted to organize a smaller Federation among the

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\(^1\) One lasting legacy of the federation movement is the University of the West Indies. It has campuses at Mona, Jamaica, St. Augustine in Trinidad, and Cave Hill in Barbados. It also maintains close working relations with the University of Guyana. Another regional institution which survived is the regional shipping service.
Eastern Caribbean islands, but his efforts proved unsuccessful. Instead, the islands, except for Montserrat became associated with British States—a half-way house towards independence. In ambitiously tackling the different aspects of regional association first, the West Indies Federation had ignored the lessons of history, which suggest that the chances of successful integration are enhanced when a community of economic interests is established beforehand.

The idea of a regional economic association was revived in the mid-1960's. At the initiative of Guyana (which had remained outside the West Indies Federation), articles of a Caribbean Free Trade Association (CARIFTA) were drawn up in 1965, and were accepted by Barbados and Antigua. The provisions of the Agreement were largely modelled on those of the European Free Trade Association (EFTA). All twelve Commonwealth Caribbean countries were able to agree on the formation of a free trade area, based largely on the text of the 1965 Agreement, and CARIFTA came into existence in May 1968. At the same time, the Eastern Caribbean islands were developing closer forms of co-operation which culminated in the formation of the Eastern Caribbean Common Market (ECCM) in June 1968.

Another important regional institution established during this period was the Caribbean Development Bank (CDB). Under the firm guidance of Sir Arthur Lewis as president, the Bank began operations in 1970 with fourteen founding regional members, and two non-regional members—Canada and the United Kingdom; the United States also provided financial assistance and Venezuela and Colombia joined later. The main purpose of the CDB, according to the Charter is to "... contribute to the harmonious economic growth and development of the member countries in the Caribbean... and promote economic co-operation and integration among them, having special and urgent regard to the needs of the less developed members of the region".

In October 1972, some of the CARIFTA member countries decided to form a Caribbean Community and Common Market (CARICOM). The Community, which came into being on 1 August 1973, represents a deepening of regional integration and has achieved such objectives as the establishment of a common external tariff, a harmonized system of fiscal incentives for
industry, double-taxation and tax-sparing agreements, and the formation of a Caribbean Investment Corporation (CIC), designed to channel equity funds to the less developed member countries.\(^2\) It initially comprised the four MDCs - Jamaica, Trinidad and Tobago, Guyana and Barbados; by the end of July 1974, all the other CARIFTA members had acceded to the Community Agreement.\(^3\)

Mainly as a result of Independence, the ECCM states have reorganized into the Organization for Eastern Caribbean States (OECS). Haiti and Suriname have both applied for membership of CARICOM but membership remains restricted to English-speaking states. It is felt by CARICOM members that there is need to deepen the integration movement and strengthen it before any extension occurs, notwithstanding the advantages that a larger market would offer.

In 1966, the Economic Commission for Latin America established an office in Port-of-Spain, Trinidad.

Since the 1950's, ECLA had promoted the concept of the economic integration of the countries of Latin America and it was, therefore, natural that in assigning priorities for activities in the Caribbean, that promotion of economic co-operation was to be the major thrust.

"In the priorities that were set, it was envisaged that there would be two elements: integration of the countries of the Caribbean, and integration of the Caribbean countries with the rest of the Latin American region. It was emphasized that the first task would be to give attention to the newly independent countries that so far had not been included in the scope of ECLA's work. But beyond that, it was not articulated in advance how integration within the Caribbean could proceed, nor how the integration of the Caribbean with the rest of Latin America might be attempted."\(^4\)

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\(^2\) The Community also provides for co-operation in "non-economic" areas - health, education, culture, meteorology, sea and air transport - and for consultations to harmonize the foreign policy of the independent member states.


The ECLA Office was initially involved in the establishment of CARIFTA, ECCM and CDB, and maintains close working relationships with the regional institutions.

**Establishment of the CDCC**

At the Sixteenth Session of the Economic Commission for Latin America held in Trinidad in 1975, it was agreed to establish the Caribbean Development and Co-operation Committee (CDCC) which was comprised of the countries "within the sphere of action of the ECLA Office in Port-of-Spain and the Governments of Cuba, the Dominican Republic and Haiti and other Caribbean countries as they achieve independence".

The CDCC is a permanent subsidiary body of the Economic Commission for Latin America at the governmental level and reports to ECLA which in turn reports to the Economic and Social Council. The Secretariat for CDCC was designated as the ECLA Office for the Caribbean.

3. DIRECT AIR SERVICES

Virtually all passengers in the Caribbean, both from inside and outside the region, are carried by air.

There are a large number of airlines based in the region operating in competition with extraregional carriers based in North, Central and South America and Europe. Operators from the region with extraregional services are based in Trinidad, Suriname, the Netherlands Antilles, Barbados, Bahamas, Guyana, Jamaica, Cuba, the Dominican Republic and Belize. There has been little attempt to consolidate these operations. Charter traffic from North America and Europe is also important.

Intraregional operators are based in Martinique, Guadeloupe, Puerto Rico, the British Virgin Islands, Antigua, Haiti and St. Maarten.

There are also a number of small charter operations scattered throughout the region.

As was mentioned in the introduction, the diverse colonial heritage is clearly reflected in the present day structure of direct air services.
While the full details are given in Table 2, showing city pairs and the number of flights per week, this information has been summarized in Table 2A. From this it will be seen that there are 17 airports with direct services to Europe, 26 to North America, 18 to South America and 8 to Central America. Only Cuba has direct links to Africa. The main hub airport for South America is CARACAS. Other destinations are served mainly by European-South American services. Panama acts as the hub for Central and South America because it is the termination point for European services. The integration of Puerto Rico into the North American network with 16 separate destinations is clearly shown in Table 2, while the economic influence of both the United States and Canada is reflected in Table 2A as no fewer than 26 of the 33 airports listed have at least one direct connexion. Since that paragraph was written a service has been initiated from Barbados and Trinidad to Manaus, Brazil, with onward connexions to eastern South America and Avianca has announced a Colombia-Barbados service.

4. AVIATION INFRASTRUCTURE

The region is characterised by the close proximity of airports capable of handling the largest commercial jet aircraft. These airports are frequently less than an hour's flying time apart. Table 3 lists them with the length of runway and the largest scheduled aircraft in operation.

There are a number of reasons for this proliferation of airports and it is appropriate to examine them now. It will be seen later that a similar situation has arisen in maritime transport. The multi-national archipelago nature of the Caribbean is the primary cause but there are others.

(a) Provision of aid funds

Historically, aid funds have not been difficult to obtain in the Caribbean. Donors have traditionally been willing to provide transport infrastructure rather than transport equipment. Sources have been British budgetary support and Canadian aid, while France and the Netherlands have spent a great deal on former colonies. The United States has provided funds on a similar scale for the Dominican Republic and Haiti as well as contributing aid to the rest of the region. These funds were made available and spent on a country-by-country basis, and as a result the regional transport system has developed in an ad hoc way instead of being planned. Perhaps this has been the natural outcome of the existence of small
political units and the resultant diseconomies are part of the price to pay for this system.

This problem was recognized by the British, Americans and Canadians who initiated the Tripartite Study of 1966 to determine how aid funds might best be spent. One result from that study was donor support for the establishment of the Caribbean Development Bank (CDB), through which aid was intended to be channelled. In practice, these three donors divided the aid programme between them and continued on an ad hoc bilateral basis as before, while also contributing to the CDB. In fairness to the donors it should be pointed out that this happened in large part on the insistence of the individual governments.

As a result, the donors failed to indicate how much aid was to be provided for each sector in the region and so the opportunity was lost for system planning on a rational basis. In the 1966-1976 period large amounts were spent on transportation, but there still remained a number of deficiencies in the system that could have been rectified with proper planning in a regional perspective had the total amount available for the sector been known at the outset.

(b) Strategy Adopted for Generating Foreign Exchange

The countries of the region adopted the strategy of generating foreign exchange through tourism. Any negative effects of tourism were ignored as was the fact that each country was generally in competition with its neighbours for the same market. However, further comment on this strategy is outside the scope of the paper.

Tourism Development Plans were generally over-optimistic in growth projections and usually stated that a major tourist complex could not really develop unless tourists could be and were taken directly to their destination.

This theory of the necessity to carry the tourist direct to his final destination on the same flight is clearly not universally true. Tourists crossing the Atlantic in either direction do not necessarily expect this. Neither did Thailand consider it necessary to build a new airport to serve Patthya Beach when this was developed as an international tourist centre. Why then should it have been a requirement in the Caribbean?
(c) Conversion of Military Facilities

After the Second World War, the region inherited a number of military airfields such as Hewanorra in Saint Lucia, Coolidge in Antigua, and Pearls in Grenada. Some of these facilities have been converted and expanded by donors over the years. It was not therefore a case of constructing completely new facilities.

The problems associated with over-investment were foreseen by the present President of the Caribbean Development Bank. Shortly after taking office he wrote:

"Another important aspect of rationalization of Air Transport concerns the duplication of large international jet ..... airports in the various countries of the Eastern Caribbean. The distances between the countries are short and it is clearly wasteful to spend several millions of dollars to duplicate such facilities. Even if the funds come from external soft loans and grants, resources are wasted in that Governments have to spend money on maintenance and, what is more, the aid funds involved could have been used to better advantage on other projects in the various countries and in the Region. It is very much to be hoped that the trend towards this wasteful pattern of competitive expenditure will be arrested immediately."  

There is no argument that every state needs an airport. In the Caribbean context that is an international airport. However the size of that airport and the type of aircraft it is required to take are matters for careful consideration. Furthermore there are States which either already have or are developing two international airports and even, in one or two cases, three. It is possible that the net revenues deriving from tourism might, in special cases, justify two airports, but very careful and sophisticated studies should be undertaken to ensure that this is the case. It would be even more difficult to justify a third airport.

The end result in the region has been under-utilization. A recent report by ICAO on the Caribbean situation stated:

"It is not possible to give any precise indication of the number of aircraft, passenger and freight unit movements necessary to enable an airport to break even since this varies considerably with the type of airport and the character of the traffic handled. Nevertheless it is clear that within each stage of an airport's development approximately the same facilities are required and the same costs are incurred in handling aircraft and passenger movements at the lower end of the airport's capacity as at the upper end. Many of the airports cannot hope to break even on their current utilization, nor on any currently projected utilization."

An airport is an asset that generates the requirement for large amounts of recurrent expenditure. Notwithstanding the policy of a government on tourism it may well be beyond the capability of a small island state to generate sufficient revenue to maintain that asset. While not developing this thought further, although it would form an interesting topic for a university thesis, it will be seen later in the paper how the donors and recipients in the region are working together through the Caribbean Group mechanism to ensure the maximum impact on aid projects.

Mention should be made at this point of a situation that developed in the region with regard to consultants. Most donors usually insist on employing their own nationals in this work.

Consequently, there have been many consultancy studies and reports in transport, funded by a variety of donors. In several cases even the organization which commissioned the work was dissatisfied with the conclusions. Some recommendations were not implemented, much work was repeated.

There would appear to be two main reasons for this unsatisfactory history. First, the transport policies appropriate to a multinational
archipelago with disparity both in trading history and physical size were more difficult to comprehend than consultants were used to. Second, the difficulties of communication, travel and data collection in the Caribbean were not often fully taken into account by external consultants unfamiliar with the region.

The end result was that studies were re-examined rather than implemented, and the Caribbean found itself educating successive generations of consultants rather than receiving the benefits of their work expressed in tangible improvements to the system.

Having made such a sweeping condemnation it is incumbent on me to justify it.

Notwithstanding the remarks just quoted from the President of CDB about wasteful duplication, and not wishing to enter into any contentious debate about the new airport at present under construction in Grenada, it is apparent that the airport at Pearls, Grenada is totally inadequate to serve that state mainly due to its inability to handle night flights in a part of the world where sunset occurs between six and six-thirty throughout the year.

The British first studied the problem in 1955 and since then seven or eight major studies have been completed. The Government desired better air communications, the lack of which was blamed, rightly or wrongly, for the slow growth in tourism and general economic development. The solution to the problem was sought for nearly twenty-five years before construction began on the new facility at Point Saline. One final comment appears appropriate. The new airport due to open later in 1983 is located on the site recommended by the original 1955 study and most if not all of the subsequent re-evaluations.

5. SHIPPING SERVICES

There are adequate links between the subregion and major trading partners, using a variety of vessel types. The World Bank estimated in the Caribbean Regional Transport Review that more than 50 steamship lines operated in Caribbean extraregional trade.
Four major conferences serve the region. They are:

(a) The Association of West Indies Trans-Atlantic Steamship Lines (WITASS);
(b) The United States Atlantic and Gulf - Jamaica Conference;
(c) The Leeward and Windward Islands and Guyana Conference;
(d) The Japan-Latin America Eastbound Freight Conference.

Full details are given in Table 4.

Some regionally operated services to extraregional destinations have been established. Several countries are studying the UNCTAD Code of Conduct for Liner Services and considering the possibility of either entering a joint venture or establishing new lines. In the bulk trade several joint operations already exist.

**Shipping services within the subregion**

These are operated by two government-owned shipping companies, WISCO and NAMUCAR; a fleet of small vessels generally under 500 net register tons, confined mainly to the Eastern Caribbean, and by extraregionally owned shipping services.

In 1977/1978 it was found that CARICOM intraregional traffic amounted to about 400,000 tons annually (see Table 1 of *Shipping Statistics of CDCC Countries* (CEPAL/CARIB 80/9).

It is not possible to ascertain the breakdown of traffic between the three types of operations, but there are no indications that it would be significantly different from previously found ratios. Previous studies have found that small vessels carry up to 60% of the traffic in the Eastern Caribbean, with extraregional shipping carrying more than 20%, the balance being carried by WISCO.

With the exception of some cabotage traffic in Haiti, services between Trinidad and Tobago, St. Kitts and Nevis within the United States Virgin Islands and between the United States Virgin Islands and the British Virgin Islands, and in the Bahamas, all passenger traffic is carried by air. Cruise ship traffic is significant throughout the Region.
Most freight is moved by sea, although air freight is increasing in importance, especially in the case of Trinidad and Tobago. Nonetheless, the percentage of total traffic carried by air remains insignificant.

Both NAMUCAR\(^6\) and WISCO\(^7\) have been consistent loss-makers despite governmental support.

Inter-island small vessels carry a large percentage of the regional trade and there is a heavy concentration of services in the Eastern Caribbean. While these vessels do not operate regular scheduled services, they tend to remain on the same route. Half of the fleet operates between Trinidad, Guyana and Barbados, while there are regular sailings between these ports and Saint Lucia, St. Vincent and Grenada. The traditional small wooden-hulled vessels with sails and an auxiliary engine have gradually been replaced with single or twin-screw steel-hulled vessels carrying up to 500 tons of cargo.

The small vessels have traditionally provided the cheapest form of sea transport, and this is made possible by low standards of service. There are frequent transit delays; damage and pilferage of cargo is prevalent. In an area where fresh fruit and vegetables form a significant part of the total traffic, there is an almost complete lack of reefer or chilled space. Spoilage losses are high. Insurance of cargo is difficult to obtain mainly due to the poor physical condition of the ships. Where it can be obtained, the cost is roughly double that for larger vessels and generally applies only to total loss. The newer steel-hulled vessels can obtain more favourable rates. Individual vessel owners seldom entertain claims for cargo damage, even when this is attributable to poor cargo handling or pilferage. Finally, it is almost impossible to obtain finance for the purchase of replacement vessels.

\(^6\) NAMUCAR originally served Tampico, Veracruz, Havana, Kingston, La Guaira, Puerto Cabello, Barranquilla, Cartagena, Cristobal, Puerto Limon, Bluefields, Houston, New Orleans, Curacao and Port-of-Spain. Considerable financial losses resulted in service cutbacks and present service is not known.

\(^7\) WISCO serves Guyana, Trinidad, Barbados, Grenada, St. Vincent, Saint Lucia, Dominica, Antigua, Montserrat, St. Kitts, Jamaica, Puerto Rico, Miami and Belize.
The problems associated with this type of operation between Eastern Caribbean islands are similar to those found in Haiti, where a lack of roads make outlying communities dependent on small vessels in coastal service.

The inter-island small vessel services do not demonstrate the same pattern as air services, and cut across heritage and language boundaries. However, there has been no scheduled passenger sea services in the Eastern Caribbean since WISCO ceased to operate a joint cargo/passenger vessel in 1975. Small vessel operators carry passengers by signing them on as crew.

The Caribbean has recently suffered from a peculiar phenomenon in shipping due to the current economic recession and the complete *laissez-faire* attitude to shipping services provided by extraregional shipping lines.

As noted above WISCO operates a government subsidized service between CARICOM states and to Puerto Rico and Miami. The economic situation in Trinidad remained much less affected by external economic factors due to the buoyant market for its oil and gas exports. There was a tremendous demand in Trinidad for both capital goods, consumer goods and food items. It has only been in the last six months or so that the general public has been aware of harsher economic conditions ahead. However, for some time the Trinidad market was still expanding whilst other markets were contracting.

Due to the loss of business elsewhere, the Caribbean in general and Trinidad in particular experienced a dramatic rise in the volume of shipping space being offered. This in turn caused Caribbean shipping rates to be depressed and WISCO was forced to make rate reductions in order to maintain traffic. The end result has been a rise in the deficit and the government owners have expressed some reluctance to support this increase at a time when extraregional lines are undercutting the rates and there is no shortage of service.
Of course it could be argued that this is beneficial as rates are lowered thus reducing costs to the Caribbean states' imports. One might say that if a government-owned line cannot compete it should be allowed to go out of business.

However, if that were to happen, what would be the end result? Let us assume a recovery in the world economic situation. Presumably the extraregional lines will revert to their former trades. At least some will. This will cause rates to rise and reduce shipping space offered. Some ports will have an inadequate service.

The current situation of increased supply of shipping space at a time of reduced demand would change to one of reduced shipping space at a time of increased demand.

Unless WISCO is protected today, it may not be in existence tomorrow.

This problem is now receiving serious attention from both the WISCO Directors and CARICOM and, of course, the governments will review the situation in establishing policy on the UNCTAD Liner Code of Conduct. A similar situation applies to air services where as a result of the United States de-regulation of the Aviation Industry, PANAM is currently offering very cheap United States Caribbean air fares and some Caribbean governments have applied them in the reverse direction to the disadvantage of BWIA and other carriers in the region. A meeting was held recently in Antigua to discuss the problem. CARICOM, OECS, ECLA, WISCO and UNSHIPRO attended and a series of proposals will be presented to the Heads of Governments for decisions.

Whatever the final outcome it seems obvious that the Caribbean region will have to impose some controls on extraregional shipping and aviation operators.

6. MARITIME TRANSPORT INFRASTRUCTURE

Most states now have deep water port facilities capable of handling large ocean vessels. However, as noted in the aviation sector, there is some evidence of over-investment or investment in inappropriate facilities.
Initially, each Port Development Plan was produced in isolation so that the World Bank Mission to CARICOM in 1973 found that all of the plans assumed that each facility would handle not only domestic traffic but transhipment traffic as well. The total projected traffic for the region taken from a summation of each of the separate plans was therefore wildly optimistic. The total lack of regional planning was again in evidence.

While the initial investment in airports was largely complete by about 1972, port development occurred throughout the seventies. By December 1979, loans from the Caribbean Development Bank (CDB) amounting to US$29 million had been approved for this purpose. That amounted to 10.8% of all loan approvals made by CDB.\(^8\) By the end of 1982, CDB had approved loans in transport and communications of about US$104 million, slightly more than 25% of all approvals. Of this amount $29 million was for Road Transport, $48 million for Maritime Transport and $18 million for Aviation. (CDB Annual Report 1982).

It can be accepted that the CDB had to yield to demands made by members in its formative years, and in fact strenuous efforts were made to scale down the proposals and restrict the amount lent. It can also be accepted that there was a need to eliminate lighterage where it was still practised. But with the benefit of 20:20 hindsight, at the end of the programme, when deep water facilities are available and the loans become due, it may well be questioned on the grounds of under-utilization if it was necessary to provide deep water berths at all ports. Few of the plans made provision for RORO ramps and some of the decking structures were not designed to handle full container loads.

As is known, the trend in ocean transportation is towards larger ships making fewer port calls. Already, container ships serve the region from Europe, North America and the Far East. Major intraregional shippers are demanding containers for shipments. Furthermore, 65% of intraregional trade is carried in small vessels. WISCO plans to operate shallow draft vessels to serve the small Eastern Caribbean

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8/ CDB, the first ten years 1970-1980.
ports with intraregional breakbulk and container traffic, as well as offering transshipment service to ocean lines. Some ocean lines have themselves announced feeder services to the smaller islands. Lines serving the region from Miami and Puerto Rico use RORO or tug and barge equipment. In the light of these developments, the provision of deep water berths in excess of 20 feet at each port would appear to be unnecessary as most, if not all, of the vessels calling at the ports will not require this depth.

As most of the Port Developments plans were produced before these trends became evident, CDB had little opportunity to modify them before construction proceeded, resulting in the need for further expenditures.

In the case of Dominica, for example, while it was necessary to eliminate lighterage, a deep-water port was built at a cost of US$5.4 million. This facility is only likely to be used regularly by the GEEST banana boats, which usually call once every ten days. GEEST, with its vertical integration of operations, will gain the main benefits, while the Government of Dominica pays the bill. Ironically, this facility was damaged by Hurricane David before its official opening and had to be rebuilt.

The relatively plentiful provisions of port infrastructure in the Caribbean can be judged from the facilities available as listed in Table 5.

Relationship between Transport and Trade

Transport service should not be viewed in isolation but as part of a system that includes production, storage and marketing. Transportation is crucial to economic development and growth. Transport services provide a means of getting products to market. In the Caribbean with the potential for increasing international trade, the provision of transport services is an important determinant of the pace and pattern of development. The success of regional integration is also a production of the development of a viable regional transport system.
7. ESTIMATED VOLUME OF IMPORTS AND EXPORTS

The estimated volume of imports to the Caribbean from selected groups of countries by metric tonnes is given in Table 6A and by shipping characteristic in Table 6. Similar tables for exports are given in Tables 7A and 7. Although not listed, this data is also available by commodity type.

The source is UNCTAD which has used United Nations Trade Statistics incorporating a conversion to metric tonnes developed by the UN Statistical Office. The data was produced as an alternative for the data that UNSHIPRO intended to produce from shipping manifests. The UNSHIPRO project will be described in more detail later in this paper.

Perhaps to emphasize the point earlier about various definitions of the Caribbean, these tables contain data for Venezuela. This information was retained to illustrate the tremendous volume of mainly oil exports that cross the Caribbean Sea and to emphasize the need for environmental protection in the area. It is also useful to compare the total size of the market if this traffic is excluded.

The total imports amount to 168 million tonnes. Oil accounts for 142 million tonnes of this traffic as can be seen from Table 6 referring to the Netherlands Antilles, the Bahamas and the United States Virgin Islands.

Similarly, reference to Table 7A shows that total exports amount to 254 million tonnes and Table 7 shows that 207 million is oil. Total regional imports excluding this commodity are about 26 million tonnes and exports about 46 million tonnes. However, Table 7 shows that of this 46 million tonnes, 40 million is comprised of bulk dry commodities, namely bauxite and sugar.

The total volume of imports and exports of refined food and general cargo can thus be seen to be relatively small.

An internal examination by the ECLA Caribbean Office into CARICOM trade showed that these countries had developed trade links with the United Kingdom, which were mainly established during the colonial era.
During the last 25 to 30 years and notwithstanding the existence of CARICOM, intraregional trade has remained well below 10% of all imports to and exports from the region.

The share of intraregional trade of CARICOM countries in domestic exports was estimated to average 6% in the 1960/65 period. The share grew modestly after the formation of CARIFTA and CARICOM, reaching a peak 10.3% of all domestic exports in 1973. Then it dropped to an average of 8% in the 1974-1980 period. Sales to developed countries in the 1960-1965 period were above 70% of all domestic exports. This was mainly to the United Kingdom and North America. This share fell in the 1970-1973 period reaching as low as 59.8% in 1972 - but climbing again to around the 70% level in the 1976-1980 period. This reflects the enormous importance of the United States and Canada for Caribbean exports, and the increase in exports to other regions since 1973. The oil crisis in 1973 probably contributed to the decline in the intraregional trade percentages and the consequent growth of the rest of the world's share. Another factor was that the value of Trinidad and Tobago's exports of oil to extraregional markets rose proportionately more than the value of its exports to regional markets.

Also worth noting is the relatively small but continuing importance of both imports and exports from CARICOM to other Caribbean countries and to the Latin American region in general. In fact, imports from Latin America are similar in amount to intra-CARICOM trade; and CARICOM exports to other Caribbean countries are approaching the levels of intra-CARICOM trade. These trends are also shown in the tables on trade.
8. TRANSPORT ACTIVITIES INITIATED SINCE THE FORMATION OF THE CDCC

Since the inception of the Caribbean Development and Co-operation Committee (CDCC), it was recognized that there were problems in transportation which might restrict economic growth. The Constituent Declaration of the CDCC states the intention to "carry out joint activities for increasing and improving national transportation facilities within the subregion and with other countries".

At the same time the importance of the maritime sector was recognized. It was noted that efficient shipping services were an indispensable prerequisite for the success of any integration effort.

Before describing the work carried out it is necessary to explain the establishment of the Caribbean Group for Co-operation in Economic Development (CGCED) and its relationship to the CDCC work programme in transport.

The World Bank has long shown a keen interest in the Caribbean and sent a Regional Mission to assess the workings of CARICOM in 1973, in which I participated. The findings were published as a World Bank Country Report entitled "The Commonwealth Caribbean - The Integration Experience" which contains a detailed appraisal of the then existing transport system. There is an extract from this earlier in this Paper.

In 1977, the World Bank initiated the CGCED which brought together donors (both new and traditional), international donor agencies and the Caribbean countries in an attempt to consolidate efforts for economic development. Initially Suriname declined but subsequently indicated that it wished to participate, so that by 1980 the CGCED included all CDCC countries, except Cuba, which is not a member of the IMF or World Bank Group.

At the first meeting of the Caribbean Group in Washington in June 1978, the Caribbean Regional Transport Review, was considered. This report assessed the ongoing and proposed transport projects in the Caribbean, identified major transport needs and gaps in pre-investment work, and made proposals for subregional and country projects to assist development in the maritime and aviation sectors.
Prior to this meeting, the Group had established a Technical Assistance Steering Committee (TASC) chaired by UNDP to review the proposals made in the Transport Review and to prepare projects for financing by the Caribbean Group.

To carry out this mandate, TASC organized a series of technical meetings of transport specialists, attended by representatives from UNDP, CDB, CARICOM, OECS, IDB, ECLA/CDCC, UNCTAD, ICAO and IBRD. During these meetings discussions were held on the conclusions and regional project proposals set out in the Review. In addition, other relevant material was examined.

It was generally agreed among participants at these technical meetings that a prerequisite for future investment in maritime facilities was rationalization of intra-Caribbean maritime transport. Furthermore, there was a broad consensus on the need for strengthening regional co-operation and harmonization of national policies for maritime and air transport. It was felt that in order to exploit the full potential of the physical infrastructure constructed over the previous decade by donors, there was a need for a relatively modest investment in transport equipment. It was also agreed that Regional Programmes would have priority.

a) **CGCED Transport Programme**

As a result of these deliberations, seven proposals were submitted to the Caribbean Group as preparatory assistance or projects; four in the maritime sector and three in civil aviation. These were:

1. Regional co-operation in the development of shipping;
2. Shipping traffic data survey;
3. Port Authority legislation;
4. Caribbean container distribution and load centre study;
5. Caribbean Airports Maintenance and Operations Study (CAMOS);
6. LIAT;
7. Caribbean air transport board or council.
Maritime Sector

Despite the efforts which had been made to develop genuine Caribbean shipping fleets and to improve port facilities, the Caribbean region remained dependent on foreign shipping services. Both the intra and extra-Caribbean trades needed to be improved in order to reduce transport costs, enhance the quality of shipping services, foster the development of regional co-operation and protect shippers' interests.

A large amount of technical assistance had been provided to the region, and maritime transport had been given significant attention by the CDCC Secretariat. Due to the importance of the maritime sector and the relationship between it and other sectors, it was felt that the efforts being made by agencies involved in maritime matters should be consolidated. With this aim in view, and following discussions between the CDCC Secretariat, IMO and UNCTAD, a joint plan of action was prepared. Funding was provided by UNDP through the CGCED, for the Regional Co-operation in the Development of Shipping, Including Support for Small Vessels and Schooners Project, or "UNSHIPRO".

It was a comprehensive project in the maritime sector, executed by UNCTAD/IMO and based in St. Lucia. The Project had a duration of three years and a cost of US$930,000. It is due to be completed this year. The Project team consisted of four experts, two UN Volunteers and a number of consultants together with regional and national counterparts.

The Project was an attempt to establish a focal point for analysis, decision-making and upgrading of shipping in the Caribbean. The initial thrust of the work programme was to cover the upgrading of the small vessel fleet in the Eastern Caribbean, the development of the maritime sector, the provision of information systems and maritime safety. In fact the Project has tended to concentrate on the training of people in the collection of traffic statistics rather than the production of needed statistics on a regular basis.

In 1978 a study by CARICOM showed that the Eastern Caribbean small vessel fleet consisted of more than 150 vessels and carried 60% of the
intra-CARICOM trade. This amounted to about 230,000 tons, with an annual freight revenue of about US$6 million.

The effectiveness of the fleet could be significantly improved by a tighter control of cargo loading patterns and sailings, with faster port turnaround. There was some overtonnaging which prevented a fully effective commercial operation.

General standards of safety were unsatisfactory. Officers and ratings were not always qualified and owners appeared to have little regard for maritime safety. Ships were often seriously overloaded and some have been known to sail with decks awash. The majority of the ships and their equipment were neither maintained in a serviceable condition nor regularly inspected. This resulted in a high loss rate of both vessels and crew as well as cargo.

As a result, hull and cargo insurance was unobtainable for a substantial part of the fleet, and even for well-maintained vessels rates were as high as 14% of the ship's value, compared to a more normal 4%.

The Project aimed to provide a set of guidelines on the appropriate function, size and technical standards of the small-vessel fleet, alternative routes and tariff structures, and its role as part of the shipping network for the area. This has not yet been initiated due to the failure to produce the data base. The Project included the definition of a group insurance scheme and financing schemes for repairs and improvements, and recommendations for ship repair facilities for appropriate navigational aids and the possible establishment of a vessel owners' association. This work has been largely completed.

The IMO work on Maritime Safety including the production of a set of Maritime Rules and Regulations and the training of officials to enforce the regulations has been completed. This together with work undertaken on a Draft Maritime Code will enable Caribbean Governments to enact their own Maritime Law and establish the necessary enforcement procedures to ensure compatibility with the international conventions covering Maritime Safety. The region may establish national maritime safety administrations.
**Shipping Traffic Data Survey**

It was recognized that the lack of adequate information on the volume of freight moving through the ports of the Caribbean severely hampered planning for both port facilities and shipping services.

In 1977 an attempt was made to redress this situation when as part of an investment study for WISCO, carried out by CDB with funding provided by the Canadian International Development Agency, the ECLA Office for the Caribbean and CARICOM worked together to produce shipping statistics on WISCO routes. This work was published as the *Inter-Island Shipping Survey* (CEPAL/CARIB 77/1).

When the Caribbean Group was formed, UNDP agreed to provide funds to update the previous exercise and the data collection and processing was again undertaken by ECLA/CDCC.

The results of this work were published as *Shipping Statistics of CDCC Countries* (CEPAL/CARIB 80/9). This report gave details of the methodology used and the problems encountered and also provided sample tabulations from the data collected. This pilot scheme was then handed to the UNSHIPRO Project for implementation.

**Port Authority Legislation, Functions and Management Structure for the CARICOM LDC's**

A pre-feasibility study was undertaken by a joint UNCTAD/IMO team funded by CDB. The mission found three common problems:

i. A shortage of the technical skills needed to operate and repair new facilities efficiently, especially in relation to modern shipping technologies;

ii. General limitations in the administrative structures that have been established, which restricted management's freedom of action and prejudiced the efficient use and development of existing facilities.

iii. A general lack of management skills, for instance, with respect to delegation of authority, staff development and labour relations.
This resulted in higher than necessary operating costs, including significant cargo losses through damage and theft.

While the number of experts required, time frame and total funds needed for the proposed project remained to be determined, a draft project document was produced and preliminary estimates suggested that US$600,000 was needed. The proposal was not further developed.

Caribbean Container Distribution and Loading Centre Port Study

It was proposed to carry out a detailed analysis of existing and planned developments in container handling facilities and services. The EEC indicated that it was prepared to consider funding for such an examination if it was a CARICOM priority item.

This matter was duly considered, but as there was no container development planned by CARICOM States at that time, CARICOM did not designate container handling as a priority area. It is interesting to note that subsequently both Aruba and Curaçao (neither of them CARICOM members but also eligible for EEC aid under LOME) requested financing from the Netherlands to construct container handling facilities in the Netherlands Antilles.

Maritime Training

Governments in the English-speaking Caribbean were concerned about the absence of facilities within the region for training seagoing personnel, particularly in subregional trade, and the CARICOM Secretariat has given priority to the establishment of maritime training facilities.

Subsequently, under a bilateral agreement with Norway, Jamaica established a maritime training facility and would like to co-operate with other governments in the region to solve their maritime training needs.

IMO preparatory assistance, financed by UNDP from the UNSIPRO Project, was provided in order to update information on maritime training needs and give technical advice on ways and means of meeting those needs under a regional approach.
A report was submitted to the CARICOM Standing Committee of Ministers of Transport.

Caribbean Airport Maintenance and Operations Study (CAMOS)

The objective of the study was to determine what was needed in terms of improvement in maintenance, operations, and equipment in order to bring 35 Caribbean airports up to the ICAO standards needed for safe and efficient handling of the current and expected traffic levels. The report found that US$40.5 million was required immediately for this purpose, while the planning and construction of further facilities was still proceeding. This raises an extremely interesting point. While small island communities need aviation facilities and wish to encourage tourism to enhance foreign exchange earnings, the high cost associated with maintaining expensive infrastructure can be a considerable drain. The CAMOS report clearly indicates that standards are not being maintained, thus suggesting that the individual governments are unable or unwilling to maintain these assets obtained mainly through soft loans and aid. The donors see any remedial work as being on a once only basis and will insist that airports be placed on a sound financial footing.

From a maintenance viewpoint, two aspects stand out clearly. First, most airport pavements needed some attention. Second, buildings and facilities deteriorated especially when they were occupied by personnel who were only assigned from other governmental units for airport duty. There were no regular inspections nor any routine maintenance programmes.

A serious situation was identified concerning fire and rescue services, which at Caribbean airports were generally below recognized safety standards. All appropriate national airport authorities appeared to be aware of this problem. Some authorities had been trying continuously to take remedial action, but others were faced with severe financial constraints and were unable to undertake the remedial actions. In nearly all cases fire and rescue equipment had been supplied by aid programmes.
Following the completion of the CAMOS study, the report was issued and circulated to the individual countries and to the donors. At the Fourth CGCED Meeting held in Washington, 1981, Canada announced that it was prepared to contribute up to $50 million from its bilateral aid programme to effect improvements needed to bring airports up to the required safety level for operations. However, this programme applied only to those Caribbean States covered by the existing Canadian Aid Programme; about two-thirds of the total.

Further analysis by Canada has suggested that the total requirement may be much higher than first thought and to date no improvements have been initiated although action is expected during 1983.

Meanwhile, UNDP, responsible for co-ordination of technical activities within the CGCED mechanism, has initiated discussions with Canada and other potential donors with the aim of establishing a co-ordinated approach that will provide maximum effectiveness of the donors programme while obviating the need for duplication of administrative arrangements and obtaining the maximum benefits for the region. It would also appear that there is a role for ICAO in providing the required technical assistance and training.

LIAT Fleet Requirements and Routing Structure

EDF funded a consultancy through CDB to define the aircraft replacement programme and service improvements that would permit the company to attain viability. The operating costs and revenue that would be produced with both existing and alternate route structures were examined.

Establishment of a Caribbean Air Transport Council

This proposal, originating from the Transport Review, was considered by the CARICOM Standing Committee of Ministers of Transport. While such an organization would be useful it was felt that its introduction was premature considering the current state of aviation in the Caribbean. Such a mechanism may evolve as the CAMOS recommendations are implemented.
I believe the major impact of the CGCED has been in the coordination of the programmes by the donors and the provision of a forum where recipient countries can meet all donors collectively. This reduces wasteful duplication of effort and assists in maximizing the impact of scarce economic resources. It is recognized that it has also introduced a greater understanding of economic management in the smaller countries.

b) Other Transport Activities

In addition to this comprehensive work programme involving all the donors and recipients within the CGCED, the CDCC has initiated or been involved with a number of other activities in Transportation and Communications. The close working relations between the regional bodies and international agencies has been achieved to avoid wasteful duplication of effort.

Caribbean Postal Union

The Caribbean Governments are concerned about the quality of mail services. It was suggested that the establishment of a Restricted Postal Union could provide several advantages, including agreed preferential postage rates, co-ordinated training facilities, simplified accounting, and the abolition of surface mail. The Secretariat explored with member governments the advantages of establishing a Restricted Postal Union, and asked the UPU to assist CDCC member countries in its establishment as required.

With the help of the UPU, the ECLA/CDCC and CARICOM Secretariats have worked together to produce a draft convention and detailed regulations for the Caribbean Postal Union. Membership would initially be open to English-speaking States. Provision has been made for other states to apply for membership subsequently. Non-English-speaking Caribbean States already belong to the Postal Union of Americas and Spain (PUAS). Jamaica has offered to host the Caribbean Postal Union in the first instance, and it is hoped that it will be established during 1983.
Search and Rescue

At about the time that the International Maritime Organization (IMO) was drafting the 1979 Search and Rescue Convention, a number of events occurred in the Caribbean to focus attention on this important aspect of maritime safety:

i. Two super-tankers collided near Tobago; fortunately with minimal damage to the environment;

ii. The USCG informed the region that it could no longer be relied upon to respond to all requests for assistance in SAR cases;

iii. Some Caribbean States were considering the formation of joint coast guard services.

As a result, IMO was requested to seek assistance for the Caribbean. Nine fellowships were obtained from Norway to send Caribbean nationals to the USCG SAR School on Governor's Island, New York and money was obtained from the Netherlands to hold a seminar in Barbados. Lecturers from the USCG, Netherlands, ICAO and IMO explained the Draft SAR Convention and basic SAR methods to representatives from more than 20 Caribbean, Central and South American States.

During the course of the seminar, participants requested IMO - in pursuance of its responsibility as depository for the International Convention on Maritime Search and Rescue 1979, and in response to Resolution 8 on the promotion of technical co-operation as adopted by the International Conference on Maritime Search and Rescue, 1979 - in co-operation with ECLA to seek the necessary financial resources for consultations between Caribbean States in order to improve arrangements for the provision and co-ordination of Search and Rescue Services and to establish agreed areas of responsibility in accordance with the provisions of the 1979 SAR Convention. With generous financial assistance provided by the Government of Venezuela, ECLA on behalf of IMO convened three subregional meetings for this purpose in the South-Central, Western and Southern Caribbean areas in 1982.
IMO and ECLA are now preparing for the final meeting due to be held in Caracas, later in 1983. The purpose of this meeting is to:

1. Discuss and resolve any outstanding issues raised at the subregional meetings;
2. Finalize the Caribbean Maritime SAR plan and adopt a resolution or draft agreement outlining recommended co-operation between states for submission to the appropriate authorities;
3. Recommend accession to the IMO SAR Convention;
4. Examine in detail those SAR capabilities which are recommended but not yet available;
5. Quantify outstanding equipment needs;
6. Quantify outstanding training needs.

**Telecommunications**

A joint work programme on this subject has been prepared by ITU and CDCC, but no funding has been identified.

**Facilitation**

UNCTAD/FALPRO carried out a review of the problem in the CDCC area in 1979/1980. Three missions were undertaken to evaluate the commercial practices of different states. In October 1981, CDCC convened a meeting of experts on facilitation problems and the strengthening of transport institutions which made specific recommendations with respect to the evaluation of possible technologies for intra-Caribbean transport system, the establishment and strengthening of national facilitation organizations, and the harmonization and reduction of commercial documents, trade procedures and practices.

The UNCTAD/FALPRO recommendations as well as the conclusion of the October 1981 meeting have been incorporated into a project proposal entitled "Facilitation of Trade and Transportation". Funding for this work is being sought. This subject matter is of particular interest
to the Caribbean as a result of the U.S.-led CBI. Consequently, my colleague responsible for trade matters in ECLA's Caribbean Office is compiling national trade procedures guides for all CARICOM countries, which will be evaluated at a meeting scheduled for later this year, where the questions of harmonization and simplification will be discussed.

Transport Planning

The unplanned nature of developments in transportation in the region has been highlighted several times. In an attempt to overcome this ECLA has established an Ad Hoc Working Group in Transport Planning. At the first meeting held late in 1982, the Working Group noted *inter alia*:

- Transportation planning in the Caribbean region was a relatively new concern of policy makers and researchers. Transportation planning was taking place without a clear specification of the macro-economic role of the transportation sector in the development process.

- Transportation decision-making in the region had been on an *ad hoc* incremental basis resulting in an unco-ordinated set of activities at both the research and implementation levels.

- There was a need for a multimodal, interdisciplinary and integrative approach to transportation planning and decision-making.

- The existing transport institutions in the region did not encourage the matching of research and implementation priorities to a regional transportation policy. There were no institutions vested with the responsibility to develop a comprehensive research programme for the region's transport economy or to encourage the development of national transportation plans.
It was agreed:

i. That the Transport Planners Working Group, established under authority of the CDCC Ministers should have the following terms of reference:

   a) Act as a focal point for transport research activities in the region;

   b) Agree on a work programme in transportation for the CDCC Secretariat and for a Multimodal Transport Research Unit;

   c) Encourage the development of National Transportation Plans in the CDCC countries;

   d) Set priorities for the MTRU and encourage the development of a transportation system that will deepen the integration process.

ii. That the MTRU be established as a permanent research institution with the regional universities.

iii. That the composition of the Transport Planners Working Group be widely based at the modal, activity and inter-disciplinary levels.

iv. That a research programme form the basis for the development of a detailed work programme for the Multimodal Transport Research Unit.

v. That a Transport Planners Course be organized for professionals engaged in Transport Planning with a view to encouraging a multimodal approach to planning and to instruct in techniques for transportation analysis.

vi. That all CDCC countries be encouraged to incorporate (where it does not exist) multimodal transport research functions in the most appropriate planning agencies in their respective countries.

vii. That CDCC countries be encouraged to formulate, develop and implement national transportation plans, utilizing an integrative multimodal approach to transport planning.
viii. That a comprehensive study on Proposed, Projected and Anticipated Transport Investment of as many CDCC countries as possible be undertaken with a view to assessing the existing state of affairs and the prospects for a co-ordinated investment programme in the region.

ix. That each CDCC country be encouraged to prepare a list of transport projects which it may wish to initiate, whether at the research, implementation or policy level.

The foregoing description clearly demonstrates that the region is heavily dependent on aid donors. What is perhaps not so clear is the close working relationship built up between the recipient countries, the regional organization and the United Nations agencies. There is a continuous dialogue so that duplication of effort is avoided and the benefit of one agency's expertise is shared with the rest.

This can perhaps be illustrated if a few minutes are taken to explain the way in which the CARICOM Secretariat approaches transportation, the way the CDB sees the future developing in the sector and finally one or two examples of co-operation between the various regional institutions in dealing with problem areas.

CARICOM has established a Standing Committee of Ministers of Transport which meets annually. It also has other sectoral ministerial groups. Above these is the Council of Ministers which meets usually twice yearly, and above the Council is the Heads of Governments which meet as necessary. The CARICOM Secretariat services these committees. CDB, OECS, UNDP, ECLA/CDCC and U.N. Specialized Agencies attend the sectoral ministerial meetings as observers. In addition to this formal structure, there are informal day-to-day contacts between the agencies. For example, in transportation it would be fair to state that contacts on all aspects of the sector are continuous between CARICOM, OECS, and ECLA/CDCC. This co-ordination has been further strengthened through the CGCED mechanism.

CARICOM has also established a number of ad hoc working groups that discuss specific sectoral problems and report back and make recommendations to the relevant Standing Committees of Ministers. For example in transportation there are several of these committees covering such diverse topics as:
air fares and rates; policy for regional airlines; maritime training; dealing with shipping conferences; drafting a regional maritime legal code; protection of regional carriers against unfair extraregional competition; work of regional harbour masters; work of regional directors of civil aviation. Some work is on an ongoing basis, while others meet to make recommendations on specific problems and then are dissolved.

One point of note is that in an area where expertise in transport is not readily available, CARICOM requests and receives assistance from other organizations such as ECLA/CDCC. An increasing amount of my time is spent on such ad hoc committees where regional problems can be freely and promptly discussed and recommendations made to the Ministers of Transport. This method also allows the CARICOM Secretariat staff to learn from the wider experiences in dealing with similar problems gained by the staff of other organizations.

Cross fertilization of ideas and experiences benefits all.

CDB has published a number of Sector Policy Papers including one on Transportation released in April 1981. It is intended that CDB should continue to finance certain transport activities while seeking to involve other agencies in co-financing operations. Emphasis will be placed on institution building, maintenance and the development of local contractor capability.

In road transport agricultural feeder roads, main roads, road maintenance and local contracting capability will be given priority.

In the maritime sector emphasis will be on regional shipping and the provision of specialized port handling equipment for the LDC's. It is intended to investigate the characteristics of shipping and port pricing so that the optimum benefits from port investments can be realized. Aviation is considered to be a prime candidate for co-financing projects with other donors but the priorities include assistance to regional carriers and the upgrading of airport facilities.
Urban transport problems have already appeared in the MDC's and is developing an investment strategy, CDB will be concerned with actions to promote more rational use of road space, linkages between inter-city roads and urban networks and road providing improved access to airports, ports and industrial locations. While total amounts required are beyond CDB's resources, the Bank is prepared to finance appropriate components in urban transportation.

Let me now provide an example to show how this works in practice. The UNSHIPRO Project executed by UNCTAD and IMO with ECLA, CARICOM and OECS as co-operating agencies. With UNDP these organizations form the project steering committee.

It has now become apparent that further work will be required to augment the UNSHIPRO work on the small vessel fleet. Following discussions between the regional agencies ECLA undertook to approach a CGCED donor to ascertain if there was interest in financing ongoing work. ECLA has produced a draft project document which has been refined following discussions between CARICOM and OECS and is now being submitted to the donor. It is anticipated that the donor will send a pre-feasibility mission to the Caribbean and review the draft document with these regional institutions. At this time the draft project document will be finalized and the region will co-operate with the donor to ensure that the project is executed successfully.

It should be noted that in this example, ECLA took the lead in the initial stages. Other examples can be found where this lead is taken by any of the other regional institutions. Perhaps Trinidad and Tobago's motto is appropriate: "Together we aspire, together we achieve".

There are a number of ongoing activities undertaken by the CARICOM Secretariat previously mentioned are undertaken in conjunction with other regional institutions and perhaps it would be appropriate to mention a few of these. In the maritime sector, ongoing activity for the small vessel fleet has already been mentioned. The protection of national shipping lines in conjunction with the UNCTAD Liner Code of Conduct is being actively dealt with. It is anticipated that policy recommendations will be made to the Heads of Governments at their next meeting in July.
The development of extraregional shipping services is the responsibility of the Shipping Lines Board of Directors. In the case of WISCO, for example, the question of expansion of service to non-member ports is being considered. If the directors agreed to a proposal it would only be passed to the ministers for information.

In aviation the Heads of Governments meeting in 1982 instructed the CARICOM Secretariat to consider the options facing the Regional Airlines. A report will be made to the Heads of Governments Meeting being held in Trinidad in July 1983 and that outcome will be awaited with interest.

It is clear that the small Caribbean based countries are at a severe disadvantage when negotiating Air Bilateral Agreements with North American and European countries. If the Caribbean countries could agree to nominate a single airline as the regional carrier, this disadvantage could be overcome as the Caribbean could offer lending rights at several points in exchange for the same in say, the United States. Antigua and Barbuda has suggested that there is insufficient service to tap the European Tourist Market. British Airways formally had a monopoly. On achieving independence and wishing to reach an Air Bilateral Agreement Antigua had no national airline. This problem could have been overcome if Antigua and Barbuda nominated, say BWIA, as its regional carrier. The same arguments apply to Fifth Freedom Rights. However, to date this concept has made little progress because of over-riding national goals.

However, there are a number of areas where technical co-operation agreements between the Caribbean Airlines could lead to economies of scale. Airline managements are known to be discussing a range of possibilities in this area.

There have also been discussions about establishing a regional holding company from which individual airlines could lease equipment. It is clear that a wide range of options are under consideration.
CONCLUSIONS

The paper has attempted to show the development of the transport system to the shape it is in today by reference to the establishment of regional institutions and the involvement of aid donors.

The Caribbean in terms of size, population and trade potential is relatively small.

The difficulties encountered by donors in trying to assist the development of the individual small economies led to a country by country approach, and from a regional perspective massive over-investment in infrastructure. In an attempt to rationalize this situation, the donors, both traditional and new, are working together within the CCGED with the Caribbean countries in order to maximize the effectiveness of the total aid programme.

The lack of any mechanism for transport planning on a regional basis has been recognized and a solution proposed by CDCC countries. While the small size of the individual states making up the Caribbean, has caused some problems there have also been some advantages.

The region has seen developments of an experimental nature that, once proved, are available for solving similar problems in other regions. For example, the work on Search and Rescue can be used to develop a search and rescue plan, not just for South America, but for the Islands of South East Asia and the Pacific.

Finally, the paper shows that just as the development of transportation is an ongoing exercise that needs ongoing review to take account of technological changes, the integration movement is also similarly dynamic.

Building on the experience of CARICOM, there needs to be an extension of the integration movement first into the wider Caribbean and then with the integration movements of Central and South America.

As noted previously, the chances of successful integration are enhanced when a community of economic interests is established beforehand. Transportation is a service industry and as such has to respond to demands for service. Trade opportunities exist between the Caribbean and North, Central and South America. The existing transportation system in the Caribbean is capable of responding to the demands to be made on it as trade expands.
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**TOTAL**                  |                     | 730,680         | 28766.4                |

1/ 1: Independent          4: CDCC Member State  
2: Colony/Dependent        5: CARICOM Member State  
3: Department of France     6: OECS Member State  
2/ St. Kitts becomes independent in September 1983.

Source: The WORLD IN FIGURES; Economist 1978.
### Table 2

**Direct Air Connections**

(By Airports and Number of direct air connections per week)

**BELIZE:**
- Houston-4; Miami-16; New Orleans-8; Washington DC-2; Guatemala-2; San Pedro Sula-11; San Salvador-16; Tegucigalpa-12.

**JAMAICA, Kingston:**
- Amsterdam-3; Brussels-2; Frankfurt-1; London-11; Luxembourg-1; Moscow-1; Boston-7; Chicago-1; Miami-56; New York-21; Philadelphia-10; Washington-3; Burlington-7; Toronto-10; Lima-1; Panama-2.

**JAMAICA, Montego Bay:**
- Amsterdam-3; Brussels-2; Frankfurt-1; London-6; Atlanta-2; Boston-7; Burlington-7; Chicago-4; Miami-35; New York-23; Philadelphia-13; San Francisco-1; Los Angeles-1; Calgary-1; Montreal-1; Toronto-10; Winnipeg-1.

**GRAND CAYMAN:**
- Atlanta-13; Detroit-6; Grand Rapids-6; Houston-4; Miami-32.

**CUBA:**
- Berlin-4; Frankfurt-2; Lisbon-1; Luxembourg-1; Madrid-6; Moscow-11; Prague-4; Shannon-3; Montreal-6; Luanda^{1}; Maputo^{1}; Cape Verde^{1}; Tripoli-1; Lima-3; Managua-1; Panama-2; San José-1.

**DOMINICAN REPUBLIC:**
- Madrid-3; Miami-26; New York-27; Barranquilla-2; Bogota-2; Caracas-8; Guatemala-2; Manaus-1; Panama-2; Rio-1; San José-1; Sao Paulo-1.

**HAITI:**
- Paris-1; Miami-16; New York-13; Montreal-2; Toronto-1; Barranquilla-1; Bogota-1.

**GRAND TURK:**
- Miami-3.

**BAHAMAS, Nassau:**
- London-3; Bermuda-2; Atlanta-19; Baltimore-7; Boston-7; Chicago-11; Dallas-3; Detroit-7; Port Lauderdale-49; Houston-7; Miami-94; New York-28; Philadelphia-7; San Diego-3; Tampa-4; Tuscon-7; West Palm Beach-12; Washington-7; Toronto-3; Panama-2.
Table 2 (CONT'D)

**BAHAMAS, Freeport:**
Atlanta-7; Fort Lauderdale-63; Miami-54; New York-14; Orlando-10; Washington-7; West Palm Beach-54; White Plains-7; Montreal-2; Toronto-1.

**PUERTO RICO:**
Frankfurt-4; London-2; Madrid-5; Paris-1; Atlanta-28; Boston-16; Chicago-26; Cleveland-1; Dallas-12; Detroit-7; Miami-65; New York-85; Orlando-7; Philadelphia-11; Pittsburg-7; Portland-7; San Francisco-6; San José (Ca)-6; Seattle-7; Washington-7; Bogota-9; Caracas-12; Guayaquil-2; La Paz-2; Lima-6; Maracaibo-2; Quito-1; San José-1.

**ST. THOMAS:**
Miami-14; New York-14.

**ST. CROIX:**
Miami-21; New York-7.

**TORTOLA:**

**CURACAO:**
Amsterdam-4; Lisbon-4; Zurich-2; Miami-18; New York-7; Barranquilla-3; Bogota-3; Caracas-28; Guayaquil-1; Lima-2; Maracaibo-2; Medellin-2; Panama-3.

**BONAIRE:**
Miami-1; Caracas-3.

**ARUBA:**
Amsterdam-2; Lisbon-2; Miami-16; New York-8; Barcelona (V)-1; Barquisimeto-1; Barranquilla-3; Bogota-3; Cali-1; Caracas-15; Maracaibo-2; Medellin-2; Panama-3.

**ST. MAARTEN:**
Dallas-4; Miami-7; New York-14; San Francisco-4.

**ANTIGUA:**
London-2; Boston-3; Miami-15; New York-22; Toronto-6; Caracas-2.

**ST. KITTS:**
Miami-1; New York-1.
Table 2 (CONT'D)

MONTserrat:

DOMINICA:

SAINT LUCIA:
London-1; Miami-6; New York-2; Caracas-2.

MARTINIQUE:
Paris-8; Bordeaux-1; Lyon-1; Mulhouse-1; Miami-8; New York-2;
Montreal-2; Toronto-1; Caracas-2.

GUADeLOUPE:
Paris-10; Bordeaux-1; Lyon-1; Mulhouse-1; Miami-5; New York-2;
Montreal-2; Toronto-1; Bogota-1; Caracas-1; Lima-1; Quito-1.

ST. VINCENT:

GREnADA:

BARBADOS:
Brussels-1; London-8; Boston-7; Miami-18; New York-21; Montreal-2;
Toronto-5; Caracas-3.

TRINIDAD:
Amsterdam-2; Lisbon-2; London-6; Boston-7; Miami-23; New York-22;
Toronto-6; Caracas-7; Maturin-2; Panama-2.

GUYANA:
Miami-2; New York-3; Boa Vista-2.

SURINAME:
Amsterdam-3; Miami-2; Belem-2; Caracas-1.

ANGuILLA:

CAYENNE:
Paris-2; Belem-1; Lima-1; Manaus-1.

1/ One Flight every two weeks.
2/ Currently suspended due to runway repairs in Trinidad.

Table 2A
Summary of Direct Air Connections by Region

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<th>COUNTRY</th>
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<th>SOUTH AMERICA</th>
<th>CENTRAL AMERICA</th>
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<td>Montego Bay</td>
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<td>BAHAMAS: Nassau</td>
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\(^1/\) Under construction.

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<th>Country</th>
<th>WITASS</th>
<th>CONECCA</th>
<th>River Plate/Caribbean/</th>
<th>Leeward and Windward Islands and Guyanas Conference</th>
<th>Other Conferences</th>
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<tbody>
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</table>

1. United States Atlantic and Gulf - Santo Domingo Conference.
2. United States Atlantic and Gulf - Haiti Conference.
3. United States Atlantic and Gulf - Jamaica Conference.
4. United States Atlantic and Gulf - Venezuela and Netherlands Antilles Conference.
Table 4 (CONT'D)

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<th>WITASS¹/</th>
<th>CONECCA²/</th>
<th>CONCA³/</th>
<th>River Plate/Caribbean/River Plate Conference</th>
<th>Leeward and Windward Islands and Guyanas Conference</th>
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1. Inter-American Freight Conference - Puerto Rico and U.S. Virgin Islands (from Brazil).
2. Japan - Puerto Rico and United States Freight Agreement.
1. United States Atlantic and Gulf - Venezuela and Netherlands Antilles Conference.
2. Hong Kong - Venezuela Rate Agreement.

Source: CRONER'S WORLD DIRECTORY OF FREIGHT CONFERENCES, R.K. Bridges, Croner Publications Ltd., U.K.

Note: Some Caribbean countries are also served by the following conferences:
   a) Latin America/Pacific Coast Steamship Conference;
   b) Hong Kong/Latin America Associated Lines;
   c) Japan/Latin American Eastbound Freight Conference; and d) Brazil/Caribbean/Brazil Freight Conference.

¹/ From Europe: WITASS = The Association of West Indies Transatlantic Steamship Lines.
²/ From Spanish Ports: CONECCA = Conference España - Caribe/Centro America.
³/ From Italian and French Ports: CONCA = Conferenza Centro America.
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<th>Total Length of Berths metres</th>
<th>Depth of Water metres</th>
<th>No. of Cranes</th>
<th>Lifting Capacity Tonnes</th>
<th>Container and Ro/Ro Facilities</th>
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Note: Abbreviations Used
- d. Draught
- dwt. Deadweight tonnage
- grt. Gross registered tonnage
- loa. Length overall
- m. Metre
- m.d. Metre draught
- t. Tonne
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| Bulk, liquid  | 46896         | 401218    | 4622968        | 28240494      | 98975         | 3046206       | 4568347 | 7202440| 38994182   | 55169425     | 54000  | 3604755  | 142051308 |
| Refrigerated  | 267085        | -         | 1110           | 13676         | 31116         | 2662          | 3561    | 21664  | 253568     | 18           | 131    | -      | 39298  | 633898 |
| General cargo, dry | 4490251     | -         | 100967         | 469041        | 966126        | 151563        | 126689  | 259258 | 3502532    | 17216        | 4123   | 1942   | 364999  | 10512906 |
| Other dry cargo | 782944       | -         | 6876           | 23157         | 3530          | 35734         | 41326   | 48330  | 253988     | 4391         | -      | 202    | 238866  | 1389997 |
| TOTAL         | 12802182      | 643096    | 6075823        | 30165973       | 1266109       | 3460110       | -5045488 | 13079524| 35441828   | 55174401     | 95373  | 4536628  | 166186737 |

- OTHER CARIBBEAN: Bulk, dry, Bulk, liquid, Refrigerated foods, General cargo, dry, Other dry cargo.
## Table 6A

**Total Import Trade - Maritime Cargo 1980**

*(Metric tons)*

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*Source: UNCTAD/SHIP/506 UNSHIPRO Interim Cargo Movement Information System for Selected Caribbean States*

- Volume 1, Table IX, December 1982. The Regional Shipping Development Project - (CAR/80/004 and RLA/79/051).
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**Source:** UNCTAD/JSIP/506 UNSHIPRO INTEREX CARGO MOVEMENT INFORMATION SYSTEM FOR CARIBBEAN STATES

- Volume 1 Table VIII, December 1982 - Regional Shipping Development Project (CAR/80/004 and RLA/79/051).