



Organisation of Eastern Caribbean States

# DRAFT COMMON TOURISM POLICY

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Prepared by



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## 1. SUMMARY

### 1.1 Tourism – Critical to the People and Economies of the OECS

Tourism is of critical importance to the economies, livelihoods, and people of the Organisation of Eastern Caribbean States (OECS). It provides incomes for people, delivers foreign exchange and generates Government revenue. Without it the people of the OECS would be very much poorer. It is a sector where the OECS has a competitive advantage. This, unfortunately, no longer applies to the region's agricultural sector; nor does it apply to manufacturing. Nurturing the tourism industry is therefore fundamental to the economic and social future of the OECS.

### 1.2 Challenges for the Sector

Tourism in the OECS faces both opportunities and challenges. This Common Tourism Policy addresses primarily those challenges that can best be addressed collaboratively at an OECS level. Others are best addressed either at a wider Caribbean level – most notably via the Caribbean Tourism Organisation (CTO) - or at a national level by respective OECS member states.

### 1.3 Vision

The OECS envisages tourism as an industry that is viable, internationally competitive, resilient and sustainable via collaboration and synergies, while improving the quality of life of the citizens of the OECS region.

### 1.4 Objectives for the Policy

The principal aim of the OECS Economic Union is to improve the region's economic competitiveness. Tourism represents a significant proportion of the region's economic base (between 24-74% of the total GDP of member states) – hence the importance of this Tourism Policy in seeking to increase collaboration across member states in order to improve the competitiveness of the region's tourism sector and consequently to increase the value that each state derives from tourism.

The overarching objective of the Policy is to achieve balanced growth and development of the tourism sector in the OECS Economic Union Area via the progressive harmonisation of tourism policies. More immediate objectives are to:

- Achieve more than individual states can achieve on their own through synergy and collaboration between OECS member states.
- Progress towards a sustainable and self-sufficient tourism economy.
- Contribute towards a wider understanding and awareness of the value of tourism amongst governments, officials and residents in member states.

## 1.5 Policy Measures

This Policy incorporates measures to:

- Achieve economies of scale to the benefit of the tourism sector across the OECS
- Facilitate travel within the OECS
- Improve access and transportation to and within the OECS
- Conserve and enhance the region's environmental and cultural assets
- Enhance regional collaboration in the tourism sector via activities at national level

**Measures aimed at achieving economies of scale** focus on: joint marketing activities, which can deliver greater impact at lower cost through economies of scale; research and statistics; human resource development; crime prevention; and on ensuring synergy with the CTO in areas where there are initiatives of mutual value to member states.

**Measures aimed at facilitating travel within the OECS** cover: harmonised customs and immigration procedures and tariffs; implementation of a common maritime space; and improved transit procedures.

**Measures aimed at improving access and transportation** focus on: joint action with respect to air travel from outside the region into the OECS and within the OECS; and joint action with respect to cruising, including yachting.

**Measures directed at environmental and cultural sustainability** include: the conservation of the natural environment; and cultural conservation and promotion.

**Measures at a national level to enhance regional competitiveness** comprise: tourism awareness; the achievement of sustainable funding for the sector; product development; investment; sectoral linkages; and joint procurement.

## 1.6 Action Plan

An Action Plan identifies a range of actions corresponding to each measure. This action-orientation is fundamental to the successful implementation of the Policy. Responsibility for leading, implementing and supporting each action is assigned as appropriate to the OECS Secretariat, individual member states and, where relevant, to other bodies such as CTO.

Collaboration with other regional bodies, according to their roles and spheres of influence, is also critical to the successful implementation of the Policy. So too is a commitment by individual states to implement this Policy, in compliance with Article 9.8 of the Treaty of Basseterre, which asserts that decisions by the OECS Council of Ministers are binding on member states, provided that it is within the sovereign competence of member states to implement them.

### **1.7 Monitoring**

The Common Tourism Policy will need regular updating to take account of changes in the external environment and of developments within the OECS. This will need to take place on an annual basis in line with meetings of the Council of Ministers of Tourism. The Policy should be thoroughly reviewed and overhauled after five years.

### **1.8 Terms**

Reference to “OECS member states” throughout this Common Tourism Policy refers to all parties to the Revised Treaty of Basseterre Establishing the Organisation of Eastern Caribbean States Economic Union, as outlined in Articles 3.1 and 3.2 of the said Treaty – both full and associate members of OECS (i.e. Antigua and Barbuda, Dominica, Grenada, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Anguilla, and the British Virgin Islands).

## 2. THE IMPORTANCE OF TOURISM IN THE OECS

### 2.1 A Critical Role

Tourism is a key part of the economy of every single OECS member state. For some, it accounts for almost the whole economy. Tourism represents a substantial source of employment. It is also a major source of foreign exchange. Tourism has, since the 1990's, helped to offset decline in agriculture and in agricultural exports.

While the sector has experienced a fall in market share in recent years, in some countries this has been offset by increased average tourism expenditures. While tourism will continue to be subject to economic change in its main markets of Europe and North America, tourism-led growth continues to be a viable strategy for the OECS. It is the principal sector in which the region has a comparative advantage.

Tourism's importance is not always fully appreciated. National accounts only demonstrate the significance of hotels and restaurants, transport and other services as separate items. They do not show the significance of the sector as a whole. Providing a more complete picture of tourism's economic impact will require the preparation of Tourism Satellite Accounts (TSA) across the OECS. The preparation of TSAs is at an early stage across the Caribbean.

In the absence of Tourism Satellite Accounts, the estimates of the World Travel and Tourism Council, published annually, do give an indication of the significance of tourism as shown in Table 2.1. (The UK and the USA are shown as comparators.)

**TABLE 2.1: THE CONTRIBUTION OF TRAVEL AND TOURISM**

Country	Direct contribution to GDP, 2011 (%)	Total contribution to GDP, 2011 (%)	Direct employment, 2011 (%)	Total employment, 2011 (%)	Exports, 2011 (%)
Anguilla	22.7	64.4	23.8	65.8	83.5
Antigua & Barbuda	17.8	74.2	18.0	69.0	74.4
BVI	21.1	57.9	24.8	65.6	43.8
Dominica	7.5	24.8	6.9	22.9	45.3
Grenada	7.3	24.2	6.8	22.4	66.7
St. Kitts & Nevis	7.8	28.2	7.7	26.7	44.3
St. Lucia	15.4	45.8	17.5	45.4	60.8
St. Vincent & The Grenadines	7.7	26.2	7.1	23.9	51.8
USA	2.6	8.8	3.9	10.5	8.5
UK	2.4	6.9	3.1	7.6	5.7

Source: World Travel and Tourism Council/Oxford Economics. Montserrat is not covered in the estimates.

While tourism is a vital part of the economies of OECS, the region's share of overall international tourism is minute, at less than 0.2% of world tourism arrivals. Even for overall Caribbean tourism, the OECS has a market share of no more than 7%. This market share has not increased over two decades (Table 2.2). The more OECS members can work together in implementing common policies and actions the more effectively the challenge from competing destinations can be addressed.

**TABLE 2.2: MARKET SHARE IN STAY-OVER ARRIVALS**

	1990-95	2005-08	2009
<b><i>Share of Caribbean total</i></b>			
Anguilla	0.3%	0.4%	0.3%
Antigua and Barbuda	1.8%	1.3%	1.1%
Dominica	0.4%	0.4%	0.3%
Grenada	0.8%	0.6%	0.5%
St. Kitts	0.7%	0.7%	0.5%
St. Lucia	1.5%	1.6%	1.3%
St. Vincent and the Grenadines	0.4%	0.5%	0.3%
<b><i>Eastern Caribbean Currency Union</i></b>	<b>5.7%</b>	<b>5.1%</b>	<b>4.3%</b>
British Virgin Islands	1.3%	1.4%	1.4%
<b><i>Share of the World Total</i></b>			
<b><i>Eastern Caribbean Currency Union</i></b>	<b>0.14%</b>	<b>0.11%</b>	<b>0.14%</b>

Sources: International Monetary Fund, Caribbean Tourism Organisation, World Travel and Tourism Council

## 2.2 The Economic Union

The OECS is pursuing increased economic integration, with the ratification of the Revised Treaty of Basseterre and its attached Protocol in January 2011. Objectives cover:

- the creation of a single financial and economic space;
- economic and social progress and cohesion, which are balanced and sustainable;
- harmonious development of economic activities through inter-sectoral linkages within and between Protocol Member States;
- continuous economic growth and expansion through the optimal utilisation of domestic and Economic-Union-wide resources;
- fair distribution of benefits throughout the Protocol Member States;
- accelerated improvement in the standard of living and reduction of poverty;
- increased levels of economic and social stability; and
- economic growth, development and international competitiveness by the convergence and co-ordination of the economic policies of Protocol Member States.

The Economic Union transfers legislative competence to the OECS Authority from the national parliaments of the member states in five agreed areas:

- The common market and customs union
- Civil aviation
- Maritime jurisdiction and boundaries
- Monetary policy
- Trade policy

The Member States agree under the Treaty to accord legislative competence to the OECS in relation to:

- Common commercial policy
- Environmental policy
- Immigration policy

All these objectives and activities relate to the tourism sector, through the importance of the sector in national economies and because of the linkages between tourism and other activities. Further, the Protocol provides for each Protocol Member State to work towards the progressive harmonisation of tourism policies. This Common Tourism Policy is a vital step in this endeavour and has as its ultimate objective the balanced growth and development of the tourism sector in the OECS Economic Union Area.

The Protocol provides for Member States to:

- establish a mechanism for joint tourism marketing and promotion; and
- establish modalities for greater community participation in the tourism product.

### 2.3 Competitiveness

The small island states that make up the OECS face major challenges in terms of competitiveness with small local markets and very limited resources, including for the marketing of their tourism assets. This places member states at a disadvantage as compared to competing tourism destinations. The most populous member state, St. Lucia, has less than 2 per cent of the population and some 2 per cent of the GDP of the most prominent Caribbean tourism destination, namely the Dominican Republic. (It receives some 7 per cent of the Dominican Republic's tourism arrivals.) Specialisation on tourism within the OECS has offset some of the limitations such as higher transportation costs and diseconomies of scale that come from being a small island economy. Nonetheless various analyses of competitiveness (such as by the World Travel and Tourism Council) have indicated that achieving greater economies of scale within the OECS is essential if enhanced competitiveness of tourism across member states is to be achieved.

## 2.4 Characteristics in Common

Experience elsewhere in the world suggests that, for regional tourism co-operation to be effective, there needs to be a strong commonality amongst member states. In the case of the OECS, member countries have much in common. There is a striving to offer an increasingly distinctive product to attract discerning stay-over visitors with relatively high average daily spends. Most member states have significant levels of cruise visitors with a desire to raise the average gross revenue per passenger. The OECS offers exceptional yachting with world-class annual events and scope for further increasing revenues from this source. For stay-over visitors there is an opportunity for the further development of niche tourism, as illustrated in Table 2.3

**TABLE 2.3: ILLUSTRATIVE COMMON NICHE TOURISM CHARACTERISTICS**

	Birding	Diving	Fishing	Golf	Health/ Wellness	MICE	Soft adventure	Wedding/ Honey- moon
Anguilla	✓	✓	✓	✓	✓	✓	✓	✓
Antigua & Barbuda	✓	✓	✓	✓	✓	✓	✓	✓
BVI	✓	✓	✓	✓	✓	✓	✓	✓
Dominica	✓	✓	✓		✓		✓	✓
Grenada	✓	✓	✓	✓	✓	✓	✓	✓
Montserrat	✓	✓	✓			✓	✓	
St. Kitts	✓	✓	✓	✓	✓	✓	✓	✓
Nevis	✓	✓	✓	✓	✓	✓	✓	✓
St. Lucia	✓	✓	✓	✓	✓	✓	✓	✓
St. Vincent & the Grenadines	✓	✓	✓	✓	✓	✓	✓	✓

Source: Acorn Consulting Partnership/CTO/NTO's

## 3. ISSUES AND CHALLENGES FOR THE SECTOR

### 3.1 External Challenges

Tourism in the OECS faces challenges on two fronts:

- **External** challenges, which are largely beyond the control of Member States.
- Challenges **within** the OECS region, which can be addressed at regional and/or national level.

The travel industry continues to undergo significant change, with changes in customer taste, product delivery, and communication methods, with increased emphasis on product quality and customer service. External challenges include:

- Economic and currency fluctuations in source markets
- Rising input prices, including in oil and food prices
- Distortion effects of government taxation and other regulations, such as the UK Air Passenger Duty
- Changes in product distribution and marketing via information technology
- Competition from other destinations

The Caribbean campaign against Air Passenger Duty has demonstrated that it is possible for challenges external to the region to be addressed on a case-by-case basis. This can be at regional level - either at overall Caribbean or OECS level.

### 3.2 OECS Regional Level

Notable issues which are appropriate to address, at least in part, at regional level cover:

- The achievement of **economies of scale**, where member states pool resources to achieve results that an individual country cannot achieve on its own.
- **Facilitation**, aimed at making **travel within the OECS** as easy as possible.
- **Transportation**, where the principle of further collaboration has been established via the 2007 Memorandum on the Air Transport Sector (and where the Eastern Caribbean Civil Aviation Authority has demonstrated the benefits of a collaborative approach to civil aviation safety and security).
- Environmental **and cultural sustainability** of tourism.

### ***Achieving Economies of Scale***

Tourism in all OECS countries operates at a relatively small-scale. This in turn leads to relatively small national marketing budgets when measured on an international scale, relatively high unit costs, and limited resources to address external challenges.

To achieve economies of scale there is scope for collaboration in:

- presence at trade fairs and in cost-sharing for other marketing/promotional activities;
- sharing best practice in areas such as for the preparation of Tourism Satellite Accounts, the development of community based tourism, increasing tourism awareness (especially for informing Government Ministers and senior policy and decision makers), and the furtherance of linkages between tourism and other economic sectors;
- specific market research of special relevance to all OECS member countries;
- human resource development;
- crime prevention.

Areas deemed to be *priorities for training and developing people in the tourism sector* throughout the region are:

- Management training
- Customer handling skills, particularly:
  - Customer service/welcome.
  - International visitor sensitisation/understanding, so that people in the tourism business understand the needs of different international visitors.
  - Foreign languages.

Specifically, there is a need to develop hospitality and training certification across the OECS for managerial and front-line/customer service staff through both on-job and entry-level training. Such an effort needs to take into account and be coordinated with CTO's and CHTA's tourism training programmes.

Harmonising standards across OECS requires a substantial investment of human resources at a regional level. Practicality and cost-effectiveness dictate that OECS should dovetail its efforts to achieve harmonisation with the CROSQ Regional Technical Committee for Tourism, which aims to achieve harmonisation throughout CARICOM, together with support to the CaribCert programme of the CHTA. CaribCert standards have been established for 45 critical occupations in the tourism and hospitality industry.

**Crime** against tourists generally attracts disproportionate media coverage in both the destination and, more significantly particularly if it involves violence, in the visitor's home country. Apart from the impact on the victim, this can have a much greater impact on the destination than is warranted by the actual level of risk to visitors. The combination of media interest, which results in disproportionate coverage, and the consequent effect on the destination's reputation, can significantly damage tourism for at least a season. If measures are not seen to be in place and vigorously enforced against such threats, the damage may continue for several years. Once gained, negative impressions are notoriously hard to change. When it comes to personal safety, there is generally a considerable time lag between the popular memory of a country's image and its new reality, even after it has taken significant steps to clean up its act.

This underlines the importance of effective crime prevention and justice in the region. Visitors who have been victims of crime are seldom willing to return as witnesses to give evidence. This can result in cases being dismissed and justice neither being done nor being seen to be done. At its worst this can encourage the belief that crime against tourists carries significantly less risk to the criminal than crime against residents, which could result in visitors being targeted even more with a consequent increase in crime against tourists and cumulative damage to the destination's reputation.

**Tourism Awareness** is important for all OECS member states. A clearer, **evidence-based demonstration to government ministers and officials** of the impact of tourism as an economic driver is highly desirable. This is important in order to encourage a greater commitment to tourism in national economic development policies. A desired result is a greater emphasis being given to tourism in national budget preparation exercises and debates and thereby improving the prospect of sustainable funding for tourism development and marketing. Such an effort is closely linked to the production of Tourism Satellite Accounts (TSA) to a standard methodology. A TSA can provide accurate data on the contribution of tourism to the economy, on the level of value added, and on the employment that comes from the sector, and thus can support the advocacy for government recognition of tourism as a key strategic sector for the OECS.

Increasing **tourism awareness amongst residents**, so that they understand the value of tourism to their countries' economies and to their own individual livelihoods can underpin improvements in customer service, which lies at the root of a nation's competitiveness as a tourism destination. This can include education in schools – indeed, several member states have carried out tourism awareness efforts aimed at young people. Tourism can possibly become a school examination subject, rather than it only being available as a formal subject at tertiary level. There is scope for the promotion of best practice at the regional level and for working with the Caribbean Examinations Council in developing examinations that are relevant to tourism.

### ***Facilitation***

The free movement of people within the region is an important element underpinning the OECS Economic Union. Its implementation will reduce queues at hub airports and accelerate clearance of customs and immigration by regional residents and thereby also speed the processing of visitors entering the region from outside the region.

The **harmonisation of customs and immigration procedures** enables easier movement of visitors within the region, through consistent procedures for visitor arrivals. Examples include the granting of a uniform maximum length of stay and full clearance procedures being undertaken just once at the port of arrival in the region, with easier and quicker clearance procedures at all subsequent borders within the region. In the European Union the single market has enabled the introduction of distinctive baggage tags that allow all passengers, irrespective of their nationality, to be exempt from customs checks for travel within the Union. This in itself facilitates intra-regional travel.

**Yachting visitors** represent a lucrative market for the OECS with opportunities for the further development of linked activities, skills development and employment. Clearance procedures and customs regulations vary from country to country. This is confusing and can cause visitors to spend a considerable proportion of their holiday time on clearance procedures. This both reduces the appeal of the OECS as a yachting destination and acts as a significant impediment to intra-regional travel by yachting visitors. The harmonisation of procedures for yachting visitors will substantially enhance the appeal of the region. Ideally the principle of undergoing full clearance procedures on arrival in the region, with a simpler approach for subsequent border crossings, should be applied to facilitate passage throughout the islands and improve the competitive appeal of the region as a yachting destination. While streamlining and expediting customs clearance of visiting yachts is a major issue, data on yacht visits will still need to be captured efficiently and effectively for each destination for monitoring and marketing purposes. Region-wide implementation of the **eSeaClear™** pre-arrival notification system will be a significant step towards addressing this obstacle.

Inefficient **transit procedures** for both international and regional travellers need to be addressed at certain chokepoints such as Antigua. The possibility of international passengers missing flight connections because of the time taken to clear customs for a country they do not even wish to visit, because of an inability to be processed as an international transfer passenger, acts as a disincentive to visit the OECS countries that lack direct airline access from outside the region. An inability to **interline bags** through from the visitor's home country to his/her destination sometimes can result in a spoilt holiday, whereby visitors are not reunited with their bags until 2-3 days later amounting to 20-30% of a 10-day holiday. The negative publicity thus generated for the region back in the visitor's home country can be significant.

Developing efficient transit procedures and airline interline agreements is required, so that transit passengers do not have to clear immigration and customs along with passengers entering the country - as is the norm in most international airports world-wide.

### ***Transportation***

Transportation issues fall into four categories:

1. External air access, particularly from Europe and North America
2. Regional air access and scheduling, where there may be disadvantage to some countries as a result of a long wait between international arrivals and connecting flights to/from some islands
3. Cruising
4. Ferry services

In **air transport** there are relatively liberal arrangements in place for Air Transport Agreements with countries outside the Caribbean. This is accompanied by a variety of support arrangements to secure air service. Intra-regionally, regulation is more restrictive under the CARICOM Multilateral Air Services Agreement (MASA).

The 2007 San Juan Accord on Regional Air Transport Sector pledged the liberalisation of the air transport sector and the intensification of efforts towards the creation of a single regional air space within sub-regional groupings such as CARICOM. This initiative has not been followed up. Yet the CTO in reviewing the region's air transport in 2007 stated "The region must begin to see itself as a single market, a single economic space, a single tourism destination and a single air space if it is to realise its true potential". (*"A proposed policy regime for ensuring the sustainability of the Caribbean's air transport services sector", August 2007*).

In **cruising** the OECS can potentially achieve greater benefits for its population via a collective approach. The industry, for its part, adopts such an approach via the Florida-Caribbean Cruise Association. The broader the collective approach in terms of participating countries within the region, the greater the potential for success in negotiating more advantageous rules, regulations and tariffs for Caribbean cruising.

There is a wish for a more regular and reliable **ferry** service between a number of islands, with an expanded service and integrated timetabling linking with flights to enable people to travel easily and efficiently between islands. The provision of any such new ferry links can be brokered via bilateral arrangements between governments. However, to be viable, ferries will either have to run on a commercial basis, or with commitment to a continuing public service

subsidy from governments at both ends of the route to cover any gap between income and operating costs.

### ***Environmental and Cultural Sustainability***

The need for a high standard in **environmental conservation** is particularly acute in the Eastern Caribbean, with its fragile island eco-systems. The ocean, in terms of beaches and as a cruising area is perhaps the region's greatest visitor asset. If this marine asset is not looked after properly and perceived by visitors to be both "clean" and well cared for, there is a risk that visitors will turn their backs on the region and seek more environmentally sustainable destinations in other parts of the world, which are becoming increasingly popular (e.g. Asia and the Indian Ocean). The same is true for the land-based natural environment, particularly in OECS states that also have a significant natural tourism product in their interior in terms of their flora, fauna and landscape.

An OECS Protected Areas and Associated Livelihoods project (OPAAL) has been developed to encourage environmental conservation, while at the same time recognising the need to enable communities to use the natural environment sustainably for their own livelihoods.

However, the spirit of this project must be both developed and its principles enforced, in order to protect the natural asset that will, if managed properly, provide such livelihoods for generations to come.

The crucial value of the ocean to the region's tourism calls for the development of enforcement methods to combat **marine pollution** by vessels (yachts, cruise ships and other commercial and pleasure vessels).

The **cultural product** in the Eastern Caribbean appears to be significantly under-appreciated as a source of interest for visitors. It is therefore under-promoted as a tourism resource. The region has a fascinating blend of cultural history, which could add another dimension to the region's tourism arsenal. If interpreted and presented imaginatively, this can expand the region's appeal to a wider audience, who might never have considered the region as anything other than a one-dimensional beach or cruising holiday.

While only a small number of indigenous people remain in the Eastern Caribbean, remnants of their culture in the form of artefacts and an understanding of their way of life are increasingly coming to light. Perhaps the most visible and potentially revenue-generating evidence of the region's more recent history lies in the forts and urban architecture associated with the region's colonial and military history. And the painful history of slavery and subsequent achievements of contemporary citizens provide both insight and inspiration to those who

might be interested in the story of the Eastern Caribbean beyond the beaches. All of these could be better interpreted and presented to visitors to the benefit of the region.

### 3.3 National Level

Issues where the emphasis is likely to be at national rather than at regional level include:

- Product development and investment
- Tourism awareness
- Tourism Satellite Accounts

There are, though, benefits to be obtained from regional collaboration in each of these important areas.

#### *Product Development*

The development of **multi-destination products**, such as island hopping, is an initiative to be pursued at regional level. Obstacles at the moment appear to be: airline scheduling and unreliability; the cost, time spent and perceived difficulty/irritation of going through several border controls; and limited ferry services connecting islands. In addition, there are niche markets such as diving, sailing, and events, which are worth exploring with a view to increased cooperation across the region. This said, the main opportunity is likely to lie in joint marketing of compatible products rather than in a joint approach to physical product development.

OECS member countries lack any form of formal tourism **quality systems** or any accommodation classification system. The CTO is promoting the Hospitality Assured Certification programme that has been developed in the UK with a pilot launched in 2010-11 under financial support from the European Union and the Organisation of American States. Hospitality Assured is a service quality standard that provides a framework for companies to review their own operation from a customer perspective to establish improvements that can be made to enhance the customer experience and strengthen business performance. The scheme does promote quality but it is not a quality ratings scheme (such as New Zealand's Qualmark) or an accommodation classification as practised in a large number of countries. It is not easy to introduce such a quality certification scheme on anything other than a national basis but, given that no such scheme exists in the OECS, it is possible to envisage that a regional tourism ratings or classification scheme could be successfully designed and introduced.

### ***Investment***

Identification of investment opportunities and negotiation with potential investors is best undertaken at national level. However, initial servicing of investment enquiries can be effectively carried out at regional level. This includes simplifying procedures for doing business by reducing red tape and providing a “one-stop shop” for investors to obtain basic information and advice on investment opportunities and regulations within the region, as a first step. This could be done through a regional investors’ guide providing potential investors with core data and summarising key elements of each state’s national policy, defining priority investment areas for each member state, and providing key contacts in each state. International promotional activity in terms of lead generation needs to be undertaken under the auspices of, and within the framework of, the emerging strategy of the Caribbean Association of Investment Promotion Agencies.

### ***Tourism Satellite Accounts***

While support and development of best practice for Tourism Satellite Accounts can be undertaken at CTO and OECS levels, including the application of the UNWTO model for the region, TSA standards can be established at regional level with the CTO, the ECCB and the OECS Secretariat working together to this end. Nonetheless the collection of the data required to produce a TSA has to be done at national level, with the collaboration of relevant national agencies being essential.

### **3.4 Commitment**

In addressing the challenges that face tourism in the OECS, commitment to implementation is vital: commitment to removing barriers and exploiting significant opportunities; commitment that from time to time permits longer-term regional interests to supersede short-term national ones, for the overall gain and long-term benefit to be greater for all. Without this, the OECS risks being an Economic Union in name only as far as tourism, the largest economic contributor, is concerned. The existence of common institutions such as the Eastern Caribbean Currency Union and the Eastern Caribbean dollar is a significant pillar of the Economic Union, setting an example of regional leadership for states to follow in respect of tourism.

### 3.5 Synergy with Other Regional Bodies

There are some 20 other regional bodies and organisations whose activities will impinge in some way on the application of a Common Tourism Policy. Notable among these is the Caribbean Tourism Organisation (CTO) and the Caribbean Hotel and Tourism Association.

CTO has a range of programmes and initiatives, which address a range of issues such as research/statistics and the introduction of TSA's through seminars, meetings and cost-effective on-line webinars. However, although the OECS Secretariat is involved, participation by OECS member states in these technical committees is often quite limited, in spite of the opportunity that is available to all. Greater engagement by OECS member states with these CTO technical committees, where there is a committee established to address a particular topic, is a starting point on issues that have been identified as important.

## 4. POLICY OBJECTIVES AND FOCUS

### 4.1 The Goal and the Vision

The aim of the Economic Union is to develop closer economic relations among Protocol Member States in order to improve the economic competitiveness of member states.

#### Goals

Tourism is a significant contributor to all OECS member states' economies, representing between 24-74% of states' total GDP. The overall aim of OECS's involvement in tourism is therefore to enhance the benefits of tourism to countries and communities in terms of their livelihood and quality of life. This means improving the region's competitiveness as a tourism destination, both collectively and as individual destinations and, specifically, contributing to the Treaty's goals of:

- Accelerating an improvement in the standard of living and reduction of poverty.
- Achieving economic and social progress and cohesion, which are balanced and sustainable.
- Increasing levels of economic and social stability.
- Promoting economic growth, development and international competitiveness by the convergence and coordination of the economic policies of Protocol Member States.

#### The Vision

The OECS vision for tourism is:

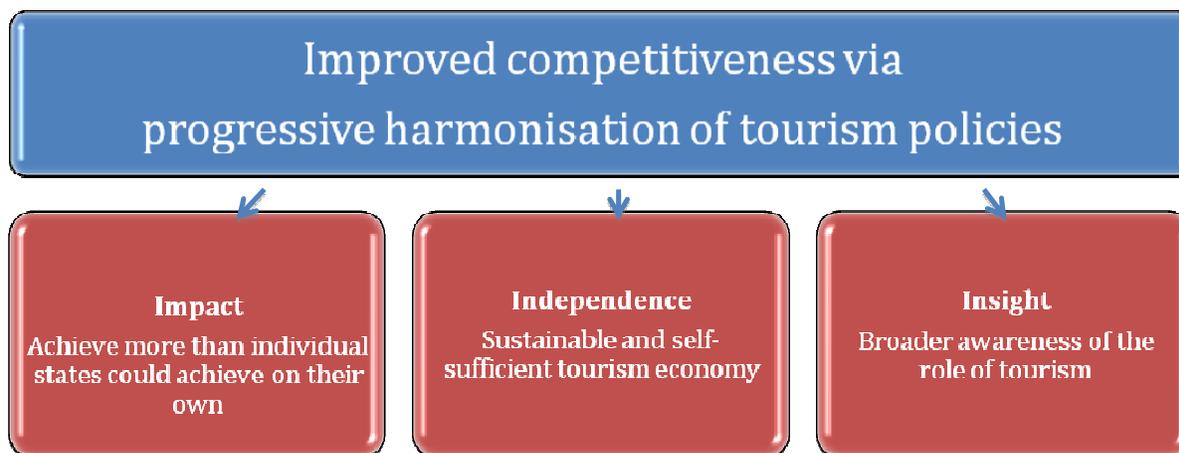
*The OECS region develops a tourism industry that is viable, internationally competitive, resilient and sustainable via collaboration and synergies whilst improving the quality of life of its citizens.*

## 4.2 Policy Objectives

In pursuit of this vision, this Common Tourism Policy for OECS member states aims to:

- Deliver synergy throughout OECS member states, by adding value for all member states and thereby achieving more than individual states could achieve on their own.
- Optimise available resources efficiently and cost-effectively.
- Assist in achieving the ultimate goal of attracting and satisfying visitors who will provide benefits to local communities by contributing towards their livelihood and quality of life.
- Inspire realistic actions to develop tourism throughout OECS member states – within realisable resources.
- Provide a sustainable way forward for OECS member states, which encourages self-sufficiency and stimulates activities aimed at growing tourism that are not dependent on donor funding.
- Create a sound framework for long-term tourism development within which the region's private sector can invest and do business with confidence and certainty as to regional policy aims.
- Contribute towards a wider understanding and awareness of the value of tourism amongst residents in OECS member states.
- Improve the overall competitiveness of the region's tourism economy on the world stage.

### Summary of Core Policy Objectives



### 4.3 Policy Focus

The Focus of the Policy is on issues where the OECS Secretariat and member states can best work together to achieve benefits for member countries in terms of increased incomes, foreign exchange and higher Government revenues. The focus is on those areas identified as key regional issues, namely:

- Achieving **economies of scale** of value to member countries via enhanced marketing and market research; the sharing of best practice in areas such as research/statistics, tourism awareness, community-based tourism and linkages between tourism and other sectors; human resource development; and crime prevention.
- Facilitation, making **intra-regional travel** within the OECS easier for both residents and for visitors from outside the region. This includes facilitation for yachting visitors, whose economic importance to the OECS has not been fully appreciated.
- Enhanced **transportation** including intra-regional flight services.
- **Environmental conservation** and a greater appreciation of the region's **cultural heritage**.

Policy measures and actions to address these areas of focus are identified in Chapters 5 and 6.

## 5. POLICY MEASURES and ACTIONS

### 5.1 Overview

Improving the region's competitiveness in the tourism sector requires progress in the following key areas of focus:

- Achieving economies of scale
- Regional facilitation
- Transportation
- Environmental and cultural sustainability

Policy measures to address these are grouped under each of these areas of focus.

Actions are identified under each policy measure to guide implementation.

Other measures, which require a predominantly national rather than regional approach, are identified at the end of this chapter under *5.6 National Measures to Enhance Regional Competitiveness*.

### 5.2 Achieving Economies of Scale

Reducing costs and increasing impact through economies of scale is one of the fundamental factors in improving competitiveness in any economic union. Although the total economy, market, and purchasing power of the combined OECS member states is still relatively small in world terms, there are small steps that can be taken to reduce costs and increase impact on a collective basis. And, in a smaller union, even small savings and collective action can deliver benefits that are significant in relative terms, which would not be achievable by states working alone.

#### **Measure #1: Marketing / Communications**

Joint marketing by OECS countries can deliver significant economies of scale. A relatively easy and cost-efficient potential "quick win" is joint stands at trade fairs, such as the International Tourismus Bourse in Berlin and World Travel Market in London. This already happens to a certain extent under the CTO umbrella. More can be made of this, specifically by organising an OECS sub-grouping within the Caribbean umbrella. Similarly some countries and private sector operators already cooperate on such a basis where it serves their individual and joint

interest (e.g. dive operators from several Caribbean countries work together at the DEMA show in the USA). Joint marketing is also undertaken by OECS countries in the Canadian market. These efforts should be extended, where appropriate, in order to achieve greater market impact for OECS countries than is possible under the very limited marketing budgets available to any one member country.

***Actions:***

**Action 1.1:** OECS will identify areas with individual states in which **joint marketing** efforts can deliver such synergy and coordinate, or agree a designated organisation to coordinate, implementation with member states and also as appropriate with CTO (e.g. Eastern Caribbean section within “Caribbean Village” at international trade fairs)

**Action 1.2:** Individual states, who share common products and markets, will identify opportunities to work together to develop **specialist/niche markets** (e.g. diving, hiking, sailing etc.), particularly with regard to joint marketing activities. While no active role is proposed for the OECS Secretariat with regard to this action, the Secretariat may suggest ideas to individual states from time to time that OECS might have observed but which states are not taking up.

**Measure #2: Research / Statistics**

Robust data on tourism is important in order to:

- Demonstrate the value of tourism to governments, officials, investors and residents.
- Maximise the impact of destination marketing activities and aid future planning.

The collection of robust data on visitor profile and travel purpose is important in helping countries to improve their marketing focus and inform product development needs. This is collected from a mixture of entry cards/immigration forms and individual country surveys. These need to be continued and improved. The standardised **entry card/immigration form** used throughout most of the region is helpful in collecting visitor information and data for marketing purposes, although some information, such as street address, can be replaced by other more useful questions, such as postal codes.

However, this card is not used consistently by all OECS member states. A more concerted effort is needed to encourage all OECS member states to use this entry card/immigration form exclusively and consistently, in order to enable the collection of comparable statistics throughout the OECS region.

**Information categories** on the entry card/immigration form should also be reviewed to identify the best compromise between what data is required for security purposes, what

information would be useful for marketing purposes, and the length of the form from a visitor tolerance perspective.

A **visitor survey template** could be produced that can be shared, but also customised as necessary, by all OECS countries.

There is a clear need to obtain more comprehensive data to track the impact of visitor expenditure throughout national economies. The UNWTO **Tourism Satellite Account (TSA)** model is a very appropriate model for collecting this. The OECS Secretariat should work closely with the CTO in their efforts to develop a TSA model for the Caribbean. The ECCB will play a key role in supporting this endeavour which will essentially be undertaken by nation states.

The economic impact of **yachting visitors** also needs to be monitored in addition to regular airline and cruise arrivals.

**Actions:**

**Action 2.1:** OECS will develop a **revised standard entry card/immigration form** with member states and ensure its universal usage. This will involve reviewing current and desired information categories to identify the best compromise between what data is required for security purposes, what information would be useful for marketing purposes, and the length of the form from a visitor tolerance perspective. This information should be reviewed for relevance every few years, as visitor trends evolve in source markets.

**Action 2.2:** OECS will develop, with member states, a **common survey template** to assess visitor satisfaction, which can be shared among, and customised as desired, by member states.

**Action 2.3:** OECS will work with the CTO and the ECCB to establish and monitor standards for data collection and interpretation as part of the development of a **Tourism Satellite Accounting** process, which must be implemented by individual states.

**Action 2.4:** OECS will work with the Economic Commission for Latin America and the Caribbean (ECLAC) to assess the **economic impact of yachting visitors** to the region. This will involve an update of the current study and, when necessary, further review of this market segment.

### **Measure #3: Human Resource Development**

Tourism is a labour-intensive, service industry, in which success depends on appropriately skilled and experienced people working in the industry who can effectively understand, communicate with, and provide for the needs of, visitors – from **marketing to customer service and product development**. Good **leadership and management** are also essential. This requires the development of a wide range of skills, which can be achieved through a mix of formal training, gaining first-hand experience, and learning from the experience of others. This can be an expensive process, involving the cost of both training and travel. Consequently, OECS will develop programmes targeting areas of greatest need within the OECS and seek cost-effective ways to work with established training courses and initiatives developed by other regional organisations, and share good practice amongst members.

The most cost-effective and most immediately practicable step in human resource development is the sharing of good practice throughout the OECS region. This can be followed by the creation of centres of excellence whereby each OECS member state develops a particular area of training expertise with training to a single standard. Examples of such nodes of speciality might be:

- Antigua and Barbuda: accommodation management
- British Virgin Islands: culinary arts
- Dominica: ecotourism
- St. Vincent and the Grenadines: marine, yachting

#### ***Actions:***

**Action 3.1:** OECS will develop mechanisms for **sharing good HRD practice** across OECS member states, particularly in areas that have been designated as a priority, such as leadership/management, customer service and welcome, international visitor sensitisation/understanding of different international visitor needs, and key foreign languages.

**Action 3.2:** There will be a **harmonisation of quality and service standards** throughout the OECS. In so far as this is practicable, this will dovetail with the CTO Hospitality Assured Programme and be implemented in collaboration with the CARICOM Regional Organisation for Standards and Quality (CROSQ).

**Action 3.3:** OECS will support **regional benchmarking initiatives** aimed at improving the visitor experience, particularly the CTO Total Visitor Satisfaction programme.

**Action 3.4:** The OECS Secretariat will facilitate the development of **core hospitality and training certification programmes** across the OECS, for managerial & front-line/customer service staff – through both on-job and entry-level training.

**Action 3.5:** OECS will work with member states to develop **centres of excellence** whereby each OECS member state develops a particular area of training expertise with training to a single standard.

#### **Measure #4: Crime Prevention**

A system is required that ensures crime against visitors does not go unresolved or unpunished, in order at least to deter criminals and at best to minimise the risk of significant damage to the destination's reputation. Some have suggested "immediate justice", whereby crimes against visitors are dealt with immediately (e.g. within 24 hours), while the victim is still on the island and able to give evidence. This happens elsewhere in some countries, but there is a clear risk of encouraging resentment amongst citizens that visitors are accorded preferential treatment and better access to justice. A **universally fair and swift system of justice**, which deals with the anomaly of crime against visitors, needs to be put in place to protect the region's reputation, inspire visitor confidence, and maintain business from tourism.

#### ***Actions:***

**Action 4.1:** OECS will work with member states to develop a **system of justice**, as part of national and regional crime prevention policies, to ensure crime against visitors is resolved and does not go unpunished – in the interests of both the victim and the destination's reputation.

**Action 4.2:** OECS will work with member states to **share intelligence** and work together to combat crime.

#### **Measure #5: Synergy with CTO**

CTO mounts a number of initiatives that are of significant relevance and value to OECS member states. It is important for OECS member states to identify and participate in those that offer the greatest opportunities.

CTO has established specific "**Technical Committees**" to progress a range of programmes and initiatives via meetings and cost-effective on-line webinars. While policy actions will be taken at an OECS level, it is appropriate for the OECS Secretariat and member states to work with CTO Committees to ensure that work is not duplicated and that efforts are complimentary.

#### ***Actions:***

**Action 5.1:** Individual states should engage productively with **CTO Technical Committees** and participate in **initiatives** to address critical issues, where CTO has developed a

mechanism to do so (e.g. marketing, HRD [management, customer service, and language learning], cruise negotiations, TSAs, tourism awareness). The OECS Secretariat will maintain an awareness of the various CTO initiatives, assess their relevance for member states and, where necessary, encourage individual states to participate in appropriate initiatives.

#### **Measure #6: Tourism Awareness**

A clearer, evidence-based demonstration to **government ministers and officials** of the impact of tourism as an economic driver is highly desirable in order to provide policymakers with valuable information on which to make public financing and investment decisions. Increasing tourism awareness amongst **residents**, so that they fully appreciate the value of tourism to their countries' economies and to their own individual livelihoods is also important. The OECS Secretariat will develop a tourism awareness programme. OECS member states should participate in the development of this programme and, when it is rolled out, customise it where necessary and apply it in each member state.

#### ***Action:***

**Action 6.1:** OECS will develop a **tourism awareness campaign** and encourage its implementation in each member state, in order to encourage residents' active support of the tourism industry and a positive approach to visitors. (See also *Action 16.2*)

Other action should be undertaken by individual states.

### 5.3 Regional Facilitation

When the visitor is faced with a range of different regulations, procedures and tariffs relating to travel throughout a region such as OECS, this can be confusing and, consequently, it can act as a disincentive to travel within the region. Harmonised regulations and tariffs can ease this process and thereby improve the visitor experience. Reliable, regular, and affordable access to and within the region is also important to ensuring the region is accessible to visitors – and something that collective action can facilitate.

#### **Measure #7: Border Control - Immigration and Customs**

The principle of the **free movement** of people within the region is an important element underpinning the OECS Economic Union. Enabling the free movement of people within the region is perhaps the single greatest change required to improve the region's economic competitiveness. Harmonising systems and reducing cumbersome procedures associated with customs and immigration formalities, while retaining measures required for security and data collection, is the biggest step that could be taken to facilitate this free movement.

This will make residents' travel easier and speed up the processing of visitors entering the region, particularly at major international arrival airports, which have become chokepoints. It will encourage intra-regional travel including by foreigners. The success of procedures put in place for the Cricket World Cup indicates the feasibility of facilitating the movement of people into and within the region, where the will exists to do so.

**Harmonised customs and immigration procedures** will be developed to enable easier movement of visitors within the region. The aim will be to introduce and apply consistent procedures for visitor arrivals. Lessons can be drawn from other regions, such as the European Union, in easing travel across national borders via such simple measures as differentiated baggage tags and separate customs lanes for intra-regional travel.

**Harmonised tariffs**, such as departure tax, throughout the OECS will be helpful for visitors and further evidence of commitment towards Economic Union.

This will apply to arrivals by **air and sea**. The principle of undergoing full clearance procedures on arrival in the region, with a simpler approach for subsequent border crossings will be applied to facilitate intra-regional air travel and to facilitate passage throughout the islands and improve the competitive appeal of the region as a **yachting** destination.

**Implementing a common maritime space** and the Caribbean Pre-Arrival Notification system, **eSeaClear™**, developed by the Caribbean Customs Law Enforcement Council (CCLEC), will be an important a step towards this. **eSeaClear™** was developed to provide small vessel operators with a faster and more positive experience when clearing in and out of port. It gives vessel operators the ability to submit electronic notifications of arrival to participating customs offices. This system needs to be comprehensively applied throughout all OECS member states and at all marine immigration and customs points. The majority of OECS countries have either introduced the system or intend to do so.

**Inefficient transit procedures** for both international and regional travellers must be addressed at key airports. The design of new facilities, particularly at major international arrival hubs, such as Antigua, should facilitate passenger transfers and every effort should be made to develop appropriate **interline** agreements to provide efficient onward travel for transfer passengers.

Implementation of these changes does not negate or belittle the need for effective **security** procedures or for collecting useful **visitor statistics** and qualitative data. These would still have to be built into measures to facilitate visitors' and residents' travel within the OECS.

Leadership on this issue will come from the OECS Authority. Individual states must also commit to supporting this by implementing the actions proposed below at national level.

***Actions:***

**Action 7.1:** OECS will **harmonise customs and immigration procedures** throughout the OECS. A uniform maximum length of stay should be granted to each visitor category. Full clearance procedures should be undertaken just once at the initial port of arrival in the region, with easier and quicker clearance procedures at all subsequent borders within the region, subject to security and visitor data collection requirements. Similarly, accompanied baggage should be exempt from further customs checks within the OECS after the first point of clearance.

**Action 7.2:** OECS will **harmonise departure taxes and other tariffs** throughout the region.

**Action 7.3:** OECS will simplify and harmonise marine customs and immigration procedures and implement the **eSeaClear™** system, in order to facilitate intra-regional travel by visiting yachts.

**Action 7.4:** OECS will establish and implement a **common maritime space** in the OECS, which enables the free movement of leisure vessels throughout the region.

**Action 7.5:** OECS will establish a protocol for the efficient handling of **transit passengers**, which must be implemented by airports and ports throughout the region.

#### 5.4 Access and Transportation (air, cruise and ferries)

As islands, international access by air and sea is critical to the very survival of OECS countries. Securing regular, sustainable access on a regular basis at affordable rates is therefore fundamental to the islands' tourism economies.

Ensuring this requires leadership from OECS and collaboration with a range of organisations, as well as commitment by individual states to work together.

##### **Measure #8: External Air Access, particularly from Europe and North America**

**Collective negotiations** with airlines should be pursued, rather than the current situation whereby each country negotiates seat guarantees individually with airlines. Further **liberalisation**, where required, of Air Services Agreements with key international partners such as the EU and the USA is envisaged in the San Juan Accord.

##### ***Action:***

**Action 8.1:** OECS will establish a mechanism to undertake **collective negotiations** with airlines on seat guarantees, rather than as individual states. Steadfast commitment by individual states to a collective approach and to the resultant agreement is essential for this to be effective.

##### **Measure # 9: International Transit Arrangements**

International transit arrangements within the OECS represent a competitive disadvantage for the region. Developing **efficient transit procedures** whereby transit passengers clear immigration and customs separately from passengers entering the country - as is the norm in many busy international airports worldwide - is essential to address this area of customer dissatisfaction and potential economic disadvantage.

##### ***Action:***

**Action 9.1:** See Action 7.6 above – re international airport transit procedures.

##### **Measure # 10: Regional Air Access and Scheduling**

Aircraft scheduling is largely a function of commercial opportunity, unless a clear public service obligation is imposed on the regional airline (i.e. LIAT) to serve economically unprofitable routes more frequently or at times more conducive to connections to/from smaller markets. Studies undertaken by the CTO and by the World Bank have pointed to the

benefit of consideration of **public service obligations** within a liberalised air transport regime. This would require substantial investment by governments (particularly in smaller states) to persuade the airline to skew its schedules in favour of such less viable or profitable routes. OECS member states should form a **route-scheduling group** to raise such issues with LIAT and to explore the possibility of adjusting schedules to meet smaller island needs, which could improve connections to/from smaller islands. Ideally this might bring a compromise between market demand and islands' needs for economic development. But it would have to be funded by individual states accordingly.

The total **price of inter-island airfares** acts as a disincentive for visitors to visit more than one island. Frequently a relatively high proportion of the 'fare' is actually composed of taxation, with the fare itself being relatively competitive. Nonetheless, opportunities for re-introducing a regional air pass or variable yield-sensitive airfares should be explored. The aim should be to increase profitable business by filling otherwise empty seats at periods of lower demand, rather than subsidising popular services.

**Action:**

**Action 10.1:** OECS will support CTO and CARICOM in the implementation of the **San Juan Accord** in order to:

- Accelerate the revision of the CARICOM Multilateral Air Services Agreement and related **liberalisation of air transport**.
- Intensify efforts towards the creation of a **single regional air space** within CARICOM, or, as a minimum, within the OECS.
- Encourage the **simplification of air transport operations** by embracing new technologies as proposed by the International Air Transport Association, to contribute towards greater efficiency, improved customer service and cost savings. These include interlining of passengers and baggage, Common Use Self-service Solution (CUSS) and Bar-Coded Boarding Passes.

**Action 10.2:** OECS will form a **route-scheduling group** to explore the possibility of adjusting regional airline schedules to meet smaller island needs, in order to underpin sustainable and convenient routes throughout the OECS.

**Measure # 11: Cruising**

**Collective negotiation of head taxes** with cruise lines should ideally replace independent negotiations by each country. A new body, a Caribbean Cruise Commission, has been suggested to do this. The concept is, ultimately, to have one central Caribbean cruise agency that would set the rules and regulations and negotiate tariffs for cruising in the Caribbean. In the meantime this could be pursued at an OECS level.

There is a considerable amount of scepticism, in light of past history, as to whether collective negotiation with airlines and cruise companies can be successful, and whether all countries could afford to hold a regionally agreed line in the face of a possible loss of business, if airlines or cruise companies threatened to pull out. Nevertheless, an attempt should be made to agree a collective approach across OECS in the interest of gaining more revenue from cruise visitors in the region. Steadfast commitment by individual states to a collective approach and to the resultant agreement is essential for this to be effective.

***Action:***

**Action 11.1:** OECS will establish a body or mechanism to **negotiate head taxes collectively** with cruise lines on behalf of OECS states (Ideally this should eventually be undertaken at a Caribbean level by a new body – e.g. a “Caribbean Cruise Commission”- or via extending the remit of an existing organisation. However, action at an OECS level, which is required now, can act as a precursor to a wider such body).

**Measure # 12: Ferry services**

The **integration** of a strategy for air services into a wider strategy that allows marine transport services, including, where feasible, fast ferry services to complement air transport services, is desirable. However, routes must either be at the risk of a commercial operator or provided under financial support via a public service obligation.

***Action:***

**Action 12.1:** Explore opportunities for developing **inter-island ferry services** on a bilateral basis between states.

## 5.5 Environmental and Cultural Sustainability

The OECS region's greatest tourism assets are its marine and territorial environment and the cultural heritage of its people. These need to be cared for, conserved and, ideally, enhanced, in order to ensure the islands maintain their appeal for future potential visitors, who will thereby contribute to people's livelihoods and to the maintenance of the islands' social fabric for many years to come. Sustainable environmental and social conservation principles are increasingly expected by visitors to destinations such as the Caribbean. Evidence of good practice in this area can enhance a destination's reputation; but a reputation for poor maintenance and an unconcerned approach to sustainable principles can quickly and deeply damage a destination's reputation for a long time.

### **Measure #13: OECS Protected Areas and Associated Livelihoods (OPAAL) Project**

**Balancing conservation of the natural environment with local people's need to earn a living and retain the cultural fabric of their community is important for the success of tourism** at both local and national levels. All tourism should contribute to people's livelihoods, underpin local communities, and, ideally, contribute to enhancing environmental conservation.

Action is required at both regional and national levels to implement the spirit and aims of the OPAAL project. As envisaged in the OPAAL project, measures can include the development of an integrated regional system, which puts in place a robust common institutional framework governing protected areas, which strengthens institutions with shared mandates to protect the natural environment, and supports regional training and public awareness of the importance of conserving the region's biodiversity and natural environment.

This must be backed up at individual state level, through a commitment to apply the St. George's Declaration of Principles for Environmental Sustainability in the OECS (2000), which includes a commitment to the conservation of biological diversity and the protection of areas of outstanding scientific, cultural, spiritual, ecological, scenic and aesthetic significance.

#### ***Action:***

**Action 13.1:** OECS will implement the **OECS Protected Areas and Associated Livelihoods (OPAAL) project**, in order to develop tourism in a way that is environmentally sustainable, compatible with local communities' wishes, and contributes positively towards the local economy and people's livelihoods.

### **Measure #14: Marine Pollution**

The crucial value of the ocean to the region's tourism industry calls for the development of enforcement methods to combat marine pollution by vessels (yachts, cruise ships and other commercial and pleasure vessels).

#### ***Action:***

**Action 14.1:** OECS will develop and implement **enforcement methods** to combat marine pollution by vessels - and particularly by yachts, cruise ships and other commercial and pleasure vessels – which must be implemented by member states.

### **Measure #15: Cultural Conservation and Promotion**

As well as the imperative to protect and preserve people's cultural heritage for the sake of national pride and for future generations, the effective preservation, interpretation and promotion of the region's culture can also add an additional dimension to the traditional, largely beach-driven, perception of the region as a holiday destination for visitors.

This requires action in the following areas:

- Regional and national commitment to the **conservation, interpretation and promotion** of the region's cultural heritage.
- Sharing **good practice** on cultural heritage conservation, research, interpretation, signage, and promotion.

#### ***Action:***

**Action 15.1:** OECS will encourage commitment at regional and national levels to the **conservation, interpretation and promotion** of the region's cultural heritage. This should include **sharing good practice** on cultural heritage conservation, research interpretation, signage, and promotion.

## 5.6 National Measures to Enhance Regional Competitiveness

### **Measure #16: Sustainable Funding**

Sustainable funding is important to develop essential tourism infrastructure and skills and to market the destination, thereby creating a basis for the destination and the tourism industry to compete effectively for visitors.

There is concern across the OECS in relation to the need for sustainable funding to undertake necessary product development and achieve adequate market penetration.

While this is perceived to be a priority for all countries, most action has to be undertaken at an individual state level – primarily by national governments, but also with participation from the private sector. The level of investment in tourism development and marketing reflects a state's commitment to tourism. This should be based on government's understanding of the contribution made by tourism to national economic and social development priorities. This is therefore the prerogative of individual state governments.

Two areas of activity that should contribute towards achieving a more sustainable funding base, albeit through national level activity, are:

- Increasing **tourism awareness** amongst residents so that they fully appreciate the value of tourism. A more widespread awareness of tourism as an economic driver should contribute towards a more positive attitude towards tourism and visitors by residents. (See action proposed under *Measure #6 Tourism Awareness* above.)
- Undertaking robust **measurement of tourism impact**, in order to demonstrate the economic impact of tourism and provide incontrovertible evidence of tourism's impact to national governments. (See action proposed under *Measure #2 Research/Statistics* above.)

#### ***Actions:***

**Action 16.1:** OECS will work with CTO, ECCB and member state governments on the development and adoption of the **UNWTO TSA model** as a basis for tourism impact measurement by individual states in the OECS region, in order to demonstrate the economic impact of tourism to governments, officials and citizens (See also *Action 2.4*)

**Action 16.2:** OECS will develop a **tourism awareness campaign** and encourage its implementation in each member state, in order to encourage residents' active support of the tourism industry and a positive approach to visitors. (See also *Action 6.1*)

Other action should be undertaken by individual states.

### **Measure #17: Product Development**

Development of certain multi-destination products could be facilitated by the single market economic union– such as island hopping, for example. However, there are significant obstacles to inter-island travel at the moment, including: airline scheduling and unreliability; risk of baggage delays (i.e. bags not being sent on the same connecting flight as the passenger); the cost, time spent and perceived difficulty/irritation of going through several border controls; inadequate transit facilities at international airports; and limited ferry services connecting islands. Actions to address these issues are recommended above under *Measure #7 Border Control - Immigration and Customs* and *Access and Transportation*.

Otherwise, for the most part, product development is best addressed at a national level. This is because of the way in which the market buys multi-destination products: even when products are sold jointly, the market tends to buy products that have been developed independently in individual islands and packaged together by tour operators. Therefore, the main opportunity appears to lie in joint **marketing** of similar products rather than in a joint approach to **physical product development** - except for **yachting**, which requires substantial improvements in customs and immigration procedures. These latter are most likely to be addressed through **legislative change** at an Economic Union level (See *Measure #7 Border Control - Immigration and Customs* above). However, there may be certain **niches** worth exploring with a view to cooperation across the region, whereby an expensive or highly skilled resource can be shared by a few neighbouring states (e.g. diving – decompression chamber; sailing – yacht repairs etc.).

OECS will assist where regional intervention or coordination might be appropriate, in the following areas:

#### ***Actions:***

**Action 17.1:** OECS will assist in addressing obstacles and encourage conditions to be created, which enable the development of **island-hopping programmes** and facilitate **inter-island travel** (See *Measure #7 Border Control - Immigration and Customs* above).

**Action 17.2:** OECS will work with individual states to explore opportunities for a joint approach to the development of **key niche products and events** amongst countries with a common interest in particular niche products, where there is both market demand and commercial logic (e.g. yachting and events).

**Action 17.3:** The OECS Secretariat will assess the possible introduction of a **common tourism quality scheme** (which may be a tourism classification system) across the OECS and report accordingly.

### **Measure #18: Investment**

Ongoing investment in tourism products and infrastructure is important to maintain standards and to develop new products, which will enable OECS destinations to compete internationally. OECS will support regional initiatives by the Caribbean Association of Investment Promotion Agencies (CAIPA) to attract investment interest and encourage individual states to assist in this process as follows.

A **regional investors' guide** should be prepared as an initial step to facilitate tourism investment. This should provide a summary of core economic data, other useful investment information, and contacts for tourism in the OECS. This activity should be undertaken under the auspices of, and within the framework of, the Caribbean Association of Investment Promotion Agencies (CAIPA). The guide can be made available on the web, possibly in collaboration with the Foreign Investment Advisory Service of the International Finance Corporation. It could be followed up by investment road shows in key locations and/or promotions at events such as the annual New York University Hospitality Industry Investment Conference and the Caribbean Hotel and Tourism Investment Conference.

OECS **member states should work with CAIPA** to maximise other opportunities that might arise from economies of scale in terms of international market penetration and lead sourcing. However, at the next stage of attracting investors the location-specific nature of most tourism investment requires a predominantly national, rather than regional, approach to investors.

#### ***Actions:***

**Action 18.1** The OECS Secretariat will coordinate the development of an **investors' guide** to the tourism investment potential of OECS member states. This should be prepared as an initial step in regional investment promotion, summarising key elements of each state's national policy, core economic data, defining priority investment areas for each member state, and providing key contacts in each state. This activity should be undertaken under the auspices of, and within the framework of CAIPA.

**Action 18.2:** The OECS Secretariat will encourage member states to **assist CAIPA** in sourcing potential investment leads, in achieving international market penetration at an entry level, and in creating awareness of investment opportunities in OECS states.

### **Measure #19: Sectoral Linkages**

Several different sectors contribute towards the visitor's experience of a destination, particularly in the culture, arts, food, drink, and agriculture sectors. Identifying and developing opportunities for synergy between sectors, which may initially be perceived to be unrelated to

each other, can increase efficiency and improve the visitor experience. Strengthening linkages between tourism and other sectors of the economy creates both income and employment. Enhancing linkages between agriculture and tourism offers potential, but requires consistent quality supplies at competitive pricing. There are opportunities in other areas, but all these require dedicated and consistent effort. Such efforts mostly have to be embedded at national level; but there is considerable potential for the **sharing of experience and best practice** across the region.

The World Bank, in its 2008 report on increasing linkages between tourism and other economic sectors in the OECS, identified that opportunities exist to increase linkages between tourism and other economic sectors. However, it also warned that interventions need to be carefully planned, given apparent fatigue with traditional methods of donor assistance. The Bank concluded that “interventions need to be carefully designed with key stakeholders, including the private sector, and implemented with first rate consultants”. While circumstances may well be different in each case, there is an opportunity for lesson learning at regional level.

Opportunities should therefore be explored at local and national levels to improve linkages between tourism and other relevant sectors (e.g. food and crafts). Improved linkages can both increase market opportunities for non-tourism suppliers through tourism outlets, particularly at local community level, and help develop skills.

The areas of greatest opportunity for activity at OECS level are:

- Development of **common product quality standards**, which may be required to enable agricultural producers to satisfy the demands of hotels, restaurants and other suppliers of food to visitors.
- Sharing **good practice** in terms of establishing linkages and understanding the tourism supply chain.

**Action:**

**Action 19.1:** OECS will seek to promote cross-sectoral linkages by identifying and disseminating examples to member states of **cross-sectoral good practice** between tourism and other sectors.

**Action 19.2:** OECS will encourage individual states to explore opportunities for improving linkages between tourism and other relevant sectors (e.g. food and crafts), through mechanisms such as the development of **common product quality standards** – which may be necessary to inspire confidence amongst potential purchasers, such as hotels and restaurants

**Measure #20: Joint Procurement**

Opportunities for joint procurement should be sought, where practical and viable, between individual states who might share a common interest and demand for similar products. However, this is not seen as a viable activity on a regional basis across the tourism sector. Opportunities for jointly procuring tourism goods and services are best explored at a national rather than regional level, as identified below.

***Action:***

**Action 20.1:** Individual states should **explore the potential for joint procurement** of key goods (e.g. agricultural produce and vehicles) among each other, where they might share a mutual interest and where there may be sufficient economies of scale to be achieved in doing so.

## 6. ACTION PLAN SUMMARY

### 6.1 Summary of Actions

The following tables summarise all actions identified to implement each policy measure.

Responsibility for leading /“owning” each action has been assigned; and organisations responsible for supporting the leaders and implementing each action have been similarly identified.

In this Action Plan, reference to OECS as the leader or supporter/implementer of action denotes the **OECS Secretariat**.

### 6.2 Definition of Timescales

Timescales have been attributed to each action. They range from short to medium and long-term. These denote the estimated time each action will take to complete. Completion means the successful implementation of each action. Timescales are defined as follows:

- **Short:** approx. 6months
- **Medium:** approx. 6 months – 1 year
- **Long:** more than 1 year

POLICY ACTIONS - SUMMARY	WHO ?		TIMESCALE
	LEAD	SUPPORT / IMPLEMENT	
<b>1. ECONOMIES OF SCALE</b>			
<b>Measure 1. Marketing Communications</b>			
<b>Action 1.1:</b> Identify areas in which joint marketing efforts can be fruitful and undertake them (e.g. Eastern Caribbean section within “Caribbean Village” at international trade fairs)	OECS	CTO	Short
<b>Action 1.2:</b> Identify opportunities for individual states with a mutual interest, who share common products and markets, to work together to develop specialist/niche markets (e.g. diving, hiking, sailing etc.)	Individual states		Short
<b>Measure 2. Research / Statistics</b>			
<b>Action 2.1:</b> Review and improve entry card/immigration form data to elicit more useful marketing information (N.B. within the bounds of visitor tolerance), taking both security and visitor research/marketing requirements into account. Revise the card. The revised standard entry card/immigration form will be introduced throughout all OECS states.	OECS	Individual states	Short
<b>Action 2.2:</b> Develop a visitor survey template that can be shared, but also customised, by all OECS member states	OECS	Individual states	Short
<b>Action 2.3:</b> Work with CTO and ECCB on the adoption of an adjusted UNWTO TSA model as a basis for tourism impact measurement by individual states in the OECS region (See also under <i>Measure 15: Tourism Awareness</i> )	ECCB/CTO	Individual states	Medium
<b>Action 2.4:</b> Work with ECLAC on updating the study on the economic impact of yachting visitors	ECLAC	OECS	Short
<b>Measure 3. Human Resource Development</b>			
<b>Action 3.1:</b> Develop mechanisms for sharing good HRD practice across OECS member states, particularly in the areas of customer service and welcome, international visitor sensitisation/understanding, and key foreign languages	OECS	Individual states	Medium
<b>Action 3.2:</b> Harmonise standards across OECS, with consideration of the introduction of a common tourism quality/classification scheme.	OECS	Individual states	Medium
<b>Action 3.3:</b> Support regional benchmarking initiatives, such as CTO’s Total Visitor Satisfaction Programme	CTO	OECS/Individual states	Medium
<b>Action 3.4:</b> Develop hospitality & training certification across OECS, for managerial & front-line/customer service staff – through both on-job and entry-level training.	OECS	Individual states	Medium
<b>Action 3.5:</b> Work with member states to develop <b>centres of excellence</b> whereby each OECS member state develops a particular area of training expertise with training to a single standard.	OECS	Individual states	Medium
<b>Measure 4. Crime Prevention</b>			
<b>Action 4.1:</b> Develop a system, as part of national crime prevention policies, to ensure crime against visitors is resolved and does not go unpunished – in the interests of both the victim and the destination’s reputation	Individual states	OECS	Medium
<b>Action 4.2:</b> Work with member states to share intelligence and work together to combat crime.	OECS	Individual states	Medium

POLICY ACTIONS - SUMMARY	WHO ?		TIMESCALE
	LEAD	SUPPORT / IMPLEMENT	
<b>1. ECONOMIES OF SCALE (cont.)</b>			
<b>Measure 5: Synergy with CTO</b>			
<b>Action 5.1:</b> Individual states should engage productively with CTO Technical Committees and participate in initiatives to address critical issues, where CTO has developed a mechanism to do so (e.g. management, marketing, HRD (language learning), cruise negotiations, TSAs, tourism awareness). The OECS Secretariat will maintain a strategic awareness of these initiatives and encourage states to participate where appropriate.	Individual states/OECS		Short
<b>Measure 6: Tourism Awareness</b>			
<b>Action 6.1:</b> Develop a tourism awareness campaign and implement it locally in each OECS state, in order to encourage residents' active support of the tourism industry and a positive approach to visitors	OECS	Individual states	Medium

POLICY ACTIONS - SUMMARY	WHO ?		TIMESCALE
	LEAD	SUPPORT / IMPLEMENT	
<b>2. REGIONAL FACILITATION</b>			
<b>Measure 7. Border Control – Immigration and Customs</b>			
<b>Action 7.1:</b> Harmonise customs and immigration procedures throughout the OECS as a fundamental element of the Economic Union	OECS/CCLEC		Medium
<b>Action 7.2:</b> Harmonise tariffs, such as departure tax, throughout the OECS	OECS	Individual states	Medium
<b>Action 7.3:</b> Simplify and standardise marine clearance procedures throughout OECS and implement the eSeaClear system for visiting yachts	OECS	Individual states	Medium
<b>Action 7.4:</b> Implement a common maritime space in the OECS	OECS	Individual states	Long
<b>Action 7.5:</b> Develop efficient procedures for transit passengers at international airport chokepoints	OECS	Individual states (those identified as chokepoints, such as Antigua)	Long

POLICY ACTIONS - SUMMARY		WHO ?	
	LEAD	SUPPORT / IMPLEMENT	TIMESCALE
<b>3. ACCESS and TRANSPORTATION</b>			
<b>Measure 8. External Air Access – esp. from Europe and North America</b>			
<b>Action 8.1:</b> Establish a mechanism to undertake collective negotiations with airlines on seat guarantees, rather than as individual states	OECS	Individual states	Medium
<b>Measure 9. International Transit</b>			
<b>See Action 7.5 above</b>	OECS	Individual states (those identified as chokepoints, such as Antigua)	Long
<b>Measure 10. Regional Air Access and Scheduling</b>			
<b>Action 10.1:</b> Support moves to liberalise regional civil aviation regulations, as proposed in the 2007 San Juan Accord to: <ul style="list-style-type: none"> <li>- Accelerate the revision of the CARICOM Multilateral Air Services Agreement and related liberalisation of air transport.</li> <li>- Intensify efforts towards the creation of a single regional air space within the OECS.</li> <li>- Encourage the simplification of air transport operations by embracing new technologies as proposed by the International Air Transport Association, to contribute towards greater efficiency, improved customer service and cost savings. These include passenger and baggage interlining, Common Use Self-service Solution (CUSS) and Bar-Coded Boarding Passes.</li> </ul>	CTO/CARICOM	OECS	Long
<b>Action 10.2:</b> Establish a route-scheduling group to explore the possibility of adjusting regional airline schedules to meet smaller island needs and to underpin route sustainability within the OECS.	OECS	Individual states	Medium
<b>Measure 11. Cruising</b>			
<b>Action 11.1:</b> Establish a body to negotiate head taxes collectively with cruise lines on behalf of OECS states - or via extending the remit of an existing organisation	OECS	CTO	Medium
<b>Measure 12: Ferries</b>			
<b>Action 12.1:</b> Explore opportunities for developing inter-island ferry services on a bilateral basis	Individual states	OECS	Long

POLICY ACTIONS - SUMMARY	WHO ?		TIMESCALE
	LEAD	SUPPORT / IMPLEMENT	
<b>4. ENVIRONMENTAL and CULTURAL SUSTAINABILITY</b>			
<b>Measure 13: OECS Protected Areas and Livelihoods Plan (OPAAL)</b>			
<p><b>Action 13.1:</b> Implement the OECS Protected Areas and Associated Livelihoods project. This should include:</p> <ul style="list-style-type: none"> <li>- development of a robust common institutional framework governing protected areas;</li> <li>- strengthening institutions with shared mandates to protect the natural environment;</li> <li>- supporting regional training and public awareness of the importance of conserving the region’s biodiversity and natural environment.</li> </ul> <p>This must be backed up at individual state level, through a commitment to apply the St. George's Declaration of Principles for Environmental Sustainability in the OECS (2000), which includes a commitment to the conservation of biological diversity and the protection of areas of outstanding scientific, cultural, spiritual, ecological, scenic and aesthetic significance.</p>	OECS	Individual states	Medium
<b>Measure 14: Marine Pollution</b>			
<p><b>Action 14.1:</b> Develop &amp; implement enforcement methods to combat marine pollution by vessels (yachts, cruise ships and other commercial and pleasure vessels)</p>	OECS	Individual states	Long
<b>Measure 15: Cultural Conservation and Promotion</b>			
<p><b>Action 15.1:</b> Develop a commitment at regional and national levels to the conservation, interpretation and promotion of the region’s cultural heritage. This should include sharing good practice on cultural heritage conservation, research interpretation, signage, and promotion</p>	OECS / Individual states	Individual states	Medium

POLICY ACTIONS - SUMMARY	WHO ?		TIMESCALE
	LEAD	SUPPORT / IMPLEMENT	
<b>6. NATIONAL MEASURES – to ENHANCE REGIONAL COMPETITIVENESS</b> (i.e. Measures where the emphasis and onus lies primarily at national, rather than regional, level)			
<b>Measure 16: Sustainable Funding</b>			
<b>Action 16.1:</b> Work with, and support, CTO and ECCB adoption of UNWTO TSA model as a basis for tourism impact measurement by individual states in the OECS region, in order to demonstrate the impact of tourism on regional and national economies to governments (See also <i>Action 2.4</i> above)	CTO/ECCB/OECS	Individual states	Medium
<b>Action 16.2:</b> Develop a tourism awareness campaign and implement it locally in each OECS state, in order to encourage residents’ active support of the tourism industry and a positive approach to visitors (See also <i>Action 6.1</i> above)	OECS	Individual states	Medium
<b>Measure 17: Product Development</b>			
<b>Action 17.1:</b> Address obstacles and put conditions in place to enable the development of island-hopping programmes and facilitate inter-island travel (See actions 6.1 – 6.6 and 11.1 above)	/OECS/ CCLEC	CARICOM	Long
<b>Action 17.2:</b> Explore opportunities for a joint approach to the development of key niche products and events amongst neighbouring countries/countries with a common interest in a particular niche product (e.g. diving, sailing, events)	Individual states	OECS	Short
<b>Action 17.3:</b> Assess the possible introduction of a common tourism quality scheme (which may be a tourism classification system) across the OECS.	OECS	Individual states	Long
<b>Measure 18: Investment</b>			
<b>Action 18.1:</b> Develop an OECS Investors’ Guide	OECS	Individual states/CAIPA	Medium
<b>Action 18.2:</b> Work with CAIPA to source potential investment leads, achieve international market penetration at an entry level, and create awareness of investment opportunities in OECS states	CAIPA	Individual states/OECS	Medium
<b>Measure 19: Sectoral Linkages</b>			
<b>Action 19.1:</b> Promote sectoral linkages via sharing lessons	OECS	Individual states	Medium
<b>Action 19.2:</b> Explore opportunities for improving linkages between tourism and other relevant sectors (e.g. food and crafts), through mechanisms such as the development of common product quality standards	OECS	Individual states	Medium
<b>Measure 20: Joint Procurement</b>			
<b>Action 20.1:</b> Explore potential for joint procurement of key goods (e.g. agricultural produce and vehicles) amongst states with a mutual interest	Individual states		Long

## 7. IMPLEMENTATION

### 7.1 Organisational Responsibilities

#### **Legitimacy**

Having been endorsed by the OECS Council of Ministers, this Common Tourism Policy shall be implemented by the OECS Secretariat and individual member states, as identified in the Action Plan above (Section 6), as required by Article 9 (Composition and Functions of the Council of Ministers) of the Treaty of Basseterre (1981, revised 2010).

Article 9 clearly defines the role of the OECS Council of Ministers in relation to the OECS Authority:

*Article 9.2 The Council of Ministers shall be responsible to the OECS Authority. It shall take appropriate action on any matters referred to it by the OECS Authority and shall have the power to make recommendations to the OECS Authority.*

*Article 9.3 The Council of Ministers shall have responsibility for -*

*(a) considering and reporting to the OECS Authority on recommendations of the OECS Commission for the making of Acts of the Organisation;*

*(b) considering and enacting into Organisation law regulations and other implementing instruments to give effect to the Acts of the Organisation enacted by the OECS Authority.*

Article 9 also articulates the principle of subsidiarity, in which member states are required to implement decisions by the Council of Ministers, subject to these decisions being within the sovereign competence of each member state:

*Article 9.5 Regulations made by the Council of Ministers shall have the same binding force as the Acts of the Organisation which authorise them, provided that the question whether Regulations so made are so authorised shall be subject to judicial review.*

*Article 9.8 Decisions by the Council of Ministers under the preceding paragraphs shall be binding on all Member States and on all Organs of the Organisation other than the OECS Authority, and effect shall be given to any such decisions provided that it is within the sovereign competence of Member States to implement them.*

## **Responsibility**

The OECS Secretariat will lead in undertaking actions requiring regional leadership, as identified in the *Action Plan* above (Chapter 6).

Individual member states will support and implement the actions identified in the *Action Plan* above (Chapter 6), as required by Article 9.8 (*Decisions by the Council of Ministers binding on all Member States*).

## **7.2 Co-ordination**

For this policy to be successfully implemented, effective and willing coordination is essential among key players at regional and member state level. This includes bodies and organisations with direct responsibility for, and influence on, the outcomes identified in the *Action Plan* above (Chapter 6).

### **Coordination at OECS Level**

The OECS Secretariat will coordinate the actions identified in the *Action Plan* above (Chapter 6) as necessary with all appropriate bodies – at a Caribbean level (e.g. CTO, CARICOM, ECLAC, CAIPA, CHTA, CCLEC et al) - and with member states.

### **Coordination at National Level**

Coordination between member states will be essential to the successful implementation of this Policy and is therefore expected universally across all member states in compliance with *Article 9.8* of the Treaty of Basseterre (1981, revised 2010).

Significant coordination will also be required between organisations within individual member states in order to implement the actions identified as part of this policy (in the *Action Plan* above (Chapter 6)) - e.g. between tourism authorities and other government departments, such as customs, immigration, trade, transportation, finance, justice, education, agriculture and environment; and between tourism authorities, educational institutions, standards bodies, and relevant private sector interests.

## 8. MONITORING AND UPDATING THE POLICY

### 8.1 The External Market Place

Tourism is subject to enormous international competition. The industry is subject to frequent change, change that may represent a threat to the OECS but equally may provide new opportunities for the OECS.

The Policy can be impacted by, for example:

- Changes in customer tastes including in the nature of the tourism product that is being sought
- Economic and currency fluctuations and changes in market demand
- Product developments and service enhancements in competing destinations
- Taxation regimes applied in originating countries
- Developments in the structure of the travel industry itself

The OECS Secretariat will work alongside other agencies, notably the CTO and the CHTA, to keep abreast of such changes and to assess their impact on the Common Policy. The CTO has foreign offices in the UK and the USA which facilitate its ability to monitor market trends and the OECS Secretariat should seek to take the best possible advantage of this.

### 8.2 Monitoring Change within the OECS

Monitoring change within the OECS will revolve around the Policy Measures and areas identified for action. Regular liaison will be needed in specific areas such as in collaborative efforts in marketing and communications and in facilitation. A challenge is posed by the multiple agencies involved, particularly in relation to facilitation. The onus must be on national government Ministries responsible for tourism to work with their national counterpart bodies in these areas and to keep the OECS Secretariat informed on a regular basis of developments at a national level that impact upon the Policy.

### 8.3 Policy Updating

The Common Tourism Policy will need regular updating to take account of external change and of developments within the OECS. This will need to take place on an annual basis in line with meetings of the OECS Council of Tourism Ministers. The Policy should be thoroughly reviewed and overhauled after five years.

## APPENDIX 1: PREPARATION OF THE POLICY

This draft of the Common Tourism Policy has been prepared by a team of two advisors, Tom Buncle and Oliver Bennett under assistance provided to the OECS Secretariat by the Commonwealth Secretariat.

The work commenced in March 2011, with a workshop of Directors of Tourism from across the OECS together with representation from the private sector and the CTO and CHTA. This was held in St. Lucia on 23 and 24<sup>th</sup> March.

Following this workshop, the advisory team made visits to each OECS member state, with further stakeholder discussions, including of potential priority areas initially established during the workshop. An Inception Report was prepared during March for submission to the Commonwealth Secretariat and the OECS.

Progress to date was then presented at the OECS Council of Tourism Ministers meeting in St. Kitts on 19<sup>th</sup> April 2011. Ministers formally:

- Noted progress on the Policy
- Endorsed the priorities thus far identified
- Strongly recommended that immigration and border control issues affecting seamless travel be addressed expeditiously

An Assessment Report was submitted at the end of May 2011. Further work encompassed in this report includes:

- A review of OECS member states' existing tourism policies and strategies, as well as regional strategies and policies
- Identification of relevant lessons from other regional areas, particularly the European Union and European Travel Commission, the Asia Pacific Economic Cooperation region (APEC), the Association of South East Asian Nations (ASEAN), the Southern African Development Community (SADC) and its offshoot the Regional Tourism Organisation of Southern Africa (RETOSA), the South Pacific Tourism Organisation (SPTO), and the tourism initiatives of the Indian Ocean Commission.

The Final Phase in the preparation of the Policy is as follows:

1. A second regional workshop, with senior representatives from OECS member states' NTOs, to be held on 17/18<sup>th</sup> August 2011 in Antigua. The purpose of this workshop is to:
  - Debate the Policy recommendations
  - Validate the Policy focus and actions
  - Agree Policy priorities
  - Agree on an implementation regime for the Policy.
2. Inviting final revisions to the draft Policy – to be submitted in writing by Friday 26<sup>th</sup> August, following the workshop.
3. Preparing the final version of the Policy, to be completed by Wednesday 31<sup>st</sup> August 2011.

This Appendix is by way of explanation and will not be included in the final Common Tourism Policy.

## APPENDIX 2: GLOSSARY

BVI	British Virgin Islands
CAIPA	Caribbean Association of Investment Promotion Agencies
CARICOM	Caribbean Community
CHTA	Caribbean Hotel and Tourism Association
CCLEC	Caribbean Customs Law Enforcement Council
COMSEC	Commonwealth Secretariat
CROSQ	CARICOM Regional Organisation for Standards and Quality
CSME	Caribbean Single Market and Economy
CTO	Caribbean Tourism Organisation
CTP	Common Tourism Policy
CUSS	Common Use Self-service Solution
DEMA	Diving Equipment and Marketing Association
ECCB	Eastern Caribbean Central Bank
ECLAC	Economic Commission for Latin America & The Caribbean
GDP	Gross Domestic Product
HRD	Human Resource Development
ITB	International Tourismus Bourse (annual trade fair in Berlin)
LIAT	Leeward Islands Air Transport
MASA	CARICOM Multilateral Air Services Agreement
NTO	National Tourism Organisation
OECS	Organisation of Eastern Caribbean States
OPAAL	OECS Protected Areas and Associated Livelihoods
TSA	Tourism Satellite Account
UK	United Kingdom
UNWTO	United Nations World Tourism Organisation
USA	United States of America
WTM	World Travel Market (London)

## APPENDIX 3: CONTACT DETAILS for ADVISORY TEAM

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