SUCCESSFUL SERVICES
EXPORTERS FROM
AROUND THE WORLD

WHY SERVICES AND
TRADE IN SERVICES
ARE IMPORTANT TO
THE CARIBBEAN

SPORTS TOURISM:
ON YOUR MARKS.
GET SET. GO!

Are you Export Ready?
The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) EPA Implementation Support Project assists regional and national organizations in the implementation of the Economic Partnership Agreement in the Caribbean. The project pursues two primary objectives: to improve the institutional and professional abilities of the EPA implementation units at the CARICOM Secretariat and in the CARIFORUM member states, and to develop a beneficial business environment for export-oriented companies for seizing market access opportunities arising from the EPA, paying particular consideration to a wider participation of women.

Initiatives the GIZ supported in 2013 included:
- **Gallery Berlin** – a fashion showcase in Germany featuring five Caribbean designers and attracting 2500 participants;
- **CARIFESTA 2013** – supported business to business meetings with artistes and EU counterparts related to scouting and joint venture initiatives and provided expert guidance in relation to intellectual property rights;
- **5th Management Consulting Symposium** – encouraged regional and international experts to establish strategic alliances and encouraged CARIFORUM management consulting firms to pursue opportunities in the EU;
- **Anuga Fine Foods** – the world’s most premier exhibition for gourmet and delicatessen products. Supported business to business meetings, market research and networking.
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The CARIBBEAN TRADE IN SERVICES MAGAZINE

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Services Scoop is a publication of the Caribbean Network of Service Coalitions
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With the Saint Lucia Hotel and Tourism Association, Yvonne served for 8 years.

Previously, she managed competitiveness of local service firms. She has worked tirelessly to ensure that the services sector is on the national policy agenda.

The SLCSI, under her stewardship, has been able to successfully implement trade export is realised.

Potential for increasing policy agenda, and its sector is on the national services sector in Saint Lucia.

Yvonne and her team have worked tirelessly to ensure that the services sector is on the national policy agenda, and its potential for increasing trade export is realised. The SLCSI, under her stewardship, has been able to successfully implement several donor programmes geared at improving the competitiveness of local services firms. Previously, Yvonne served for 8 years in the vital tourism industry with the Saint Lucia Hotel and Tourism Association.

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Contributors
My advice to service providers is this – build your land legs, and take advantage of the opportunities within CARIFORUM and the EU. Imagine the competitiveness of the animal strong on both land and water!

**How can you build these land legs?**

◊ **Work together** with other companies both nationally and regionally. Let me quote a participant of ANUGA: “Apart from being a successful business trip, it was simply amazing to feel the unity and assistance shown between our colleagues – what the Caribbean fights so hard to achieve. ‘Working together’ appeared to be put into action on this venture!”

◊ **Sell the Caribbean as a package:** Caribbean music, cuisine, designs, and goods combined offer a true Caribbean feeling, which the customers in Europe will look for (even if they don’t know it yet)!

◊ **Be high quality.** Become internationally certified – for example apply for Leadership in Energy and Environmental Design (LEED) certificate for architects or become a certified management consultant!

◊ **Participate!** Through capacity building activities, trade fairs, market surveys and the guidance of consultants and business support organisations, businesses in the region can become more familiar and comfortable with the EU markets.

◊ **Seek guidance** from the Caribbean Network or Service Coalitions and your local coalition of service industries.

I like the metaphor the BCSI has used to describe service providers – the flying fish! Although modest in size, under the right circumstances, the flying fish can soar 180 meters in a single flight. Caribbean businesses might also be small by international standards, but like the flying fish can reach outstanding goals and be exceptional.

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**ANIMAL METAPHORS ARE COMMON** in many languages and are often used to reference business and economic activities. For example, we use the term ‘Asian tigers’ to describe the free and developed economies in Asia, refer to ‘bulls’ and ‘bears’ to characterise market conditions, or ‘gorilla’ to illustrate a large, dominating company. The recent US shutdown is described in Germany using the word ‘Pleitegeier’ or ‘vulture’. ‘Vulture’ is also used in English with respect to ‘vulture fund’ or ‘vulture capitalist’ – an investment in failing companies. There are a multitude of examples. Given the fiercely competitive and oftentimes complicated nature of the business and financial world, it is not surprising that we rely on these easy to understand metaphors to describe and explain.

When reflecting on the economic situation in the Caribbean, I can’t help but think of the turtle. In the sea, the turtle is fast and elegant, but on the shore, turtles are slow and awkward. Most companies in the region feel quite comfortable in their domestic markets, but are insecure on the shores of more foreign markets, like the EU.

The GIZ is undertaking a four-year EPA (CARIFORUM-EC Economic Partnership Agreement) implementation project in the region. A major element of this project is the extension of support in the development of the region’s services sector. The service sector is an overwhelmingly important element of CARIFORUM economies. Tourism, financial services, ICT, creative industries, to name but a few, have a high potential for growth, be it in domestic, regional or international markets. To support this statement, there are many magnificent examples of export success highlighted in this 3rd edition of the Services Scoop.

Given the potential of this sector and the unprecedented market access that service providers now enjoy under the EPA, has the agreement resulted in increased services exports to the EU? Unfortunately, the answer is ‘no’, but the more important question is: why not? This is not an easy answer. For one, trade in services globally, including within the EU, has not increased since 2008. This is due to several global and regional economic crises which overarched possible positive effects of the EPA. Second, is the lack of Mutual Recognition Agreements in all services sectors but architecture. In this respect, the negotiation strength and drive of the CARIFORUM countries needs to be increased – this can only happen with the involvement of all stakeholders. Third, high energy costs, low internet bandwidth and high transport and logistics costs still restrict the movement of both goods and services within the region and beyond.

My advice to service providers is this – build your land legs, and take advantage of the opportunities within CARIFORUM and the EU. Imagine the competitiveness of the animal strong on both land and water!
A MESSAGE FROM
the CNSC
SPURRING SERVICES FORWARD

2013 marked an important year for services development – a year in which the services momentum, both regionally and internationally, built significantly.

**On the regional front, many of the CSIs undertook valuable and foundational activities.** For example, Barbados prepared a national service sector development strategy, as did Jamaica. Belize prepared a baseline survey of the Belizean services sector and Trinidad launched SOCA, a Caribbean private sector coalition designed to promote the enhancement of the United States Caribbean Basin Initiative.

Globally, the international Trade in Services Agreement, an agreement that will impact and shape all future trade in services agreements, continues to be negotiated, as does the EU-US Free Trade Agreement, an agreement that will cover 46% of global GDP and which will certainly include a services component.

This increased level of activity in services and the essential nature of the activities currently being undertaken across the region will assuredly perpetuate even more support and growth in the services sector. I have no doubt that 2014 will be a good year for services in the Caribbean.

We invite you to ride the momentum being built, recognise the value and the opportunities related to the services sector, take on board the points raised in the following pages and take action.

Look outwards, readers. Our Caribbean economies may be sluggish at the moment, but internationally, opportunities abound. Taking the first step to becoming a service exporter should not be daunting or overwhelming given the support available via the coalitions. Taking the first step, rather, should be a 2014 imperative. Call on your local coalition to support you in your efforts and let’s bring Caribbean services to the world.

To the GIZ, the CNSC would like to thank you for your continued support; to all our contributors we thank you as well for your time and assistance in producing another meaningful edition of Services Scoop and to our readers, we wish you happy and thoughtful readings!

Marjorie Straw is the Executive Chairman of the Caribbean Network of Service Coalitions and the Manager - Special Projects, Planning and Corporate Development at JAMPRO with responsibility for the Jamaica Coalition of Service Industries.
Dear Reader,
As Lead Head of Government in the CARICOM Quasi Cabinet with responsibility for services in the CSME, I am once again pleased to be given this opportunity to share with you my thoughts on the sector and provide you with an update on the status of our efforts to create a single market for services.

In my estimation, two of the most used words so far for the year 2013 have been ‘change’ and ‘reform’. From the ordinary man in the street, to the political leaders, you would have heard talks of change and reform in every facet of our lives. You would have also witnessed the implementation of reforms in our systems and changes in our strategies to achieve our short, medium and long term goals, especially in response to these very trying economic times. Many of you may be feeling overwhelmed and frustrated by what is happening and questioning whether it is worth it.

I remain however, very optimistic that the services sector will be the principle source of the positive outcomes from these changes and reforms. For one thing, employment and output in the services sector across the Community have been holding their own and so our economies have been quite resilient to the harsh external economic environment. We also made a major breakthrough in the area of professional services when, on 3 May, 2013, the participating members states in the CSME adopted, in principle, the Regional Policy Framework for the Provision of Professional Services in the CSME. Steps have therefore been taken to establish a regional regime for professionals which is in line with the spirit of the Revised Treaty.

This brings me to a focus of this edition tourism: beyond sea, sun and sand and the creative industries.

It is estimated that in 2011, world travel and tourism accounted for more than US$6 trillion, supported 260 million jobs, and attracted US$650 billion in investment. Growth is expected to be slower over the next ten years, but this sector is expected to remain a major driver of economic growth for the region. Sea, sun and sand are renewable assets which we take for granted but they are our principal resources. Discussions on “beyond the sea, sun and sand” should therefore also address the need for increased product innovation of our sun, sea and sand, leading to increased connectivity between the tourism sector and every other sector of the regional economy, as we institute reforms in pursuit of a sustainable tourism industry.

The creative industries involve all aspects of human endeavour and should also be part of this connectivity framework. At a minimum, our creative industries must produce a clear identity of the ‘Caribbean Person’, a unique branding of our regional goods and services which in turn spurs growth in all our economic sectors, including that of tourism.

In terms of the priorities of the region, it must be borne in mind that we are creating a system to support all aspects of life in the Community. No one area is more important than the other, or the system will fail, requiring constant reactive rather than proactive responses. Our priorities remain the same: international finance, transportation, ICT, health and wellness, education. The strategies used to realise these priorities must be changed, but at the end of the day we are striving for improved standards of living and work of our peoples, and sustained economic development.

I wish you good reading as you encounter the many thoughts presented. More importantly, I wish that your creativities would be sharpened and that you would dedicate yourselves to the work ahead. Let us have your ideas on the articles, as well as your shared thoughts on the various proposals developed to advance the peoples and economies of the region.
Think for a minute about the incredibly important role services play in any modern economy. Consider education, health, transportation, banking, telecommunications and construction services for example, and where we’d be without these reliable, quality services.

Services are the foundation of our society and our economy.

Our region tends to hold tightly to our agricultural and manufacturing sectors as engines of economic growth, despite the correlation made by the World Bank and others of the higher contribution of growth in the services sector to poverty reduction than the agricultural or manufacturing sectors. The 2011 World Development Indicators further shows that the services sector accounted for almost 71% of global GDP in 2010. The Caribbean’s services sector continues to grow in line with this trend.

While it is true that increasingly more attention and resources have gradually made its way to support developments in the region’s services sector, this sector needs full attention and support. With increased market access opportunities, the levelling power of the internet to bolster services exports, and an educated, talented and skilled workforce, it is the services sector that is truly the region’s growth engine! Trade in services is an opportunity to harness this important and growing sector, participate meaningfully in international trade and realise development gains.

How can we support and harness the region’s services sector?
Read on.
...services represent the largest and most dynamic component of both developed and developing country economies, serving as crucial inputs in the production of goods and agricultural products...
In the past, especially in the pre-independence years, economies in the Caribbean were agricultural in nature and, in some cases, were monocrop economies.

In such instances, emphasis was placed on the production of one good, such as sugar, cotton, nutmeg or bananas depending on the country. However, this is no longer the case.

As economic development has come to characterise the global landscape, societies within the developing world have also been maturing. Many Caribbean economies have developed into services economies. These services include banking, education, energy, finance, health, telecommunications and tourism services, amongst others.

According to the World Trade Organization, services represent the largest and most dynamic component of both developed and developing country economies, serving as crucial inputs in the production of goods and agricultural products.

Writing on CARICOM, Chaitoo (2005) in his article entitled CSME and Competitiveness of Service Industries in CARICOM noted that services play a leading role in regional economies of CARICOM member states. He went further, stating that in some of the economies in the sub-regional grouping of the Organisation of East Caribbean States (OECS) services accounted for more than 70% of gross domestic product (GDP) and 70% of exports. This therefore means that services are crucial to the economic development of those societies, replacing the once dominant banana industry and employing tens of thousands of persons throughout the subregion.

Additionally, the UNDP International Human Development Indicators database provided a detailed analysis of the
performance of the service export sector in CARICOM for the decade 1999 to 2009. It is clear that services exports contribute substantial revenues to the economic well-being of CARICOM member states especially The Bahamas, Jamaica, Barbados and Trinidad and Tobago. (See Table 1)

The imports of services also play an important role within CARICOM member states’ economies. Statistical data from the aforementioned database covering the decade 1999-2009 indicates that Jamaica, The Bahamas and Barbados are the main importers of services in CARICOM.

Above and beyond contributing to the economic health of CARICOM countries as indicated by the statistics, services play a wider role within such societies. Essentially, they serve as the binding force – akin to mortar between bricks – within a modern economy. Consider the important role that health, education, construction and telecommunications services play, for example. Services characterise an economy through the invisible infrastructure laid down by the various service providers.

Traditionally, the Caribbean has been referred to as a region where production costs are high relative to those of our competitors. Therefore, the prices of our goods will be higher and uncompetitive when compared to those of our competitors in the international market place. However, regarding services, less developed countries including, CARICOM member states, are typically able to offer less costly services. This is true of the costs of health and education services in the Caribbean when compared with those of equal measure on offer in the European Union, United States and Canada.

Services characterise an economy through the invisible infrastructure laid down by the various service providers.

TRADE IN SERVICES

What exactly is trade in services? Trade in services has its genesis in the Uruguay Round of trade negotiations, which resulted in the General Agreement on Trade in Services. In January 2000, trade in services made its way on to the agenda of multilateral trade negotiations.

Services, when traded, can be supplied via four modes (see page 21). These being Mode 1 – cross border supply, Mode 2 – consumption abroad, Mode 3 – commercial presence and Mode 4 – the movement of natural persons.

Trade in services is important to the region for a number of reasons. Primarily, the region is the first within the African, Caribbean and Pacific Group of countries to sign an Economic Partnership Agreement (EPA) with the European Union liberalising trade in services. Consequently, service providers from the Caribbean now have access to the lucrative European Union market consisting of approximately 500 million consumers. Prior to this, all trade agreements regulating trade between Europe and the Caribbean only focused on trade in goods. The EPA is a watershed in trade relations between the EU and CARICOM. It is a priceless opportunity for service providers from the region to expand their services to the international world and also earn valuable foreign exchange.

Secondly, because of this trade policy reform, service providers in the Caribbean will now face competition from their European counterparts. It will force them to become more competitive by raising their standards of production.

Thirdly, there are welfare gains to be derived from engaging in trade in services. These include achieving higher rates of economic growth, attracting higher levels of foreign direct investment, earning greater amounts of foreign exchange and increasing...
employment opportunities for citizens. This is especially true when trade in services has been liberalised at the multilateral level, between trading blocs, or at the bilateral level, between two countries.

This has been noted by several authors in academic literature. McGuire (2002) discussed the importance of services trade liberalisation for developing countries from the aspect of market access. He contended that developing countries stand to gain from the liberalisation of trade in services by having access to markets for the exports of services in which they have a comparative advantage. Mattoo et al (2006) in their article opined that countries which liberalised their telecoms and financial sectors record growth rates which are 1.5 percentage points higher than countries which do not liberalise these sectors. Terzi (2010) highlighted the benefits of liberalising trade in services, noting the positive effects it has on a country’s balance of payments, the welfare gains to be had and the opportunities for countries to develop the outputs of their service sectors. She also opined that developing world countries have benefitted from the export of construction, banking, telecommunications and professional services.

**CONCLUSION**

In conclusion, services and trade in services are important to the Caribbean for the reasons outlined above. Governments in the Caribbean have to be visionary and seize the opportunities before them in order to expand their services sectors whilst diversifying and modernising their economies. This can only be achieved through the implementation of trade policy reforms such as liberalising trade in services which will engender welfare gains resulting in economic development for these developing countries.

Governments in the Caribbean have to be visionary and seize the opportunities before them in order to expand their services sectors whilst diversifying and modernising their economies.

### WORLD EXPORTS OF COMMERCIAL SERVICES – CARICOM 1999-2009

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
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<td>93</td>
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<td>598</td>
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<td>838</td>
<td>883</td>
<td>800</td>
<td>910</td>
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</table>
The executives of the Hotel Association sensed that there was something not quite right with the figures. The report noted that tourist arrivals were up from the previous year, but a survey of their 60 members showed that room occupancy at most of the hotels was going down.

The number of flights from the Gulf had increased, but the nationality profiles of the tourists had not changed significantly and tour operators in leading destinations in Europe had not reported a corresponding rise in sales. There was clearly need for the Hotel Association, together with other Government bodies, to unpick the numbers.
A meeting was arranged with the Ministry of Finance. In the following weeks the Statistics Office, Immigration, Revenue Authority and Tourism Board were brought together so that the agencies would collectively obtain a more detailed and meaningful picture of how tourism was evolving. A task force was formed with the objective of improving the timeliness, relevance and completeness of tourism statistics in order to equip policy makers and investors for more effective decision making.

It did not take long before a number of interesting developments began to emerge. The profile of tourists was indeed changing, with more now shunning traditional hotels for privately-owned villas. This would have implications on the licences the country had projected for new hotels and resorts. Further, the members of the Hotel Association that were planning to expand their facilities had to factor this into their business plans. The Planning Authority would need to consider a different set of issues. Privately-owned accommodation would no doubt spur new type of service providers with whom policy makers had not interacted before. Providers of janitorial services would become an even more important factor in the overall tourist experience but they were not well organised or regulated.

On its part, the Hotel Association needed to better understand this new sector of the economy in order to decide how best to interface with them. Would they have to introduce a new category of membership? The Hotel Association’s survey had thrown up a wide range of issues, some with far reaching implications. The task force agreed to monitor the figures for a longer period to isolate short term blips in the economic environment from developments that constituted a longer term trend.

In improving competitiveness in services, the Commonwealth Secretariat works with stakeholders in Government and the private sector to build consensus on a set of monitorable priority actions to drive growth in trade and investment. While statistics for the tourism sector are more easily available, data on other commercial services is notoriously sparse. Take the example of Barbados, where we are supporting the Barbados Coalition of Service Industries to formulate a services sector strategy. A snapshot of statistics for Finance and Business services is provided below.

Of the components under ‘Finance and Business (i.e. insurance, finance, computer and information, royalties and license fees, other business services), the largest – which accounts for 754m Barbados dollars worth of exports – cannot be broken down any further. This category represents roughly 25% of all services exports and is clearly one that requires more analysis. Commonwealth Secretariat expertise is assisting in this regard as part of its services strategy development. However, this is only the first step in a series of activities that need to be undertaken on a regular basis.

Our experience has shown that there is an over-reliance on national statistics offices, and perhaps not enough done to fill out the gaps inherent in the aggregated data and reports they are mandated to provide. In order for CSIs to effectively influence policy, build capacity and improve trade in services, it is crucial that they attain an intimate understanding of how non-tourism services in their countries are developing over time. One of the most reliable ways to do this is through regular membership surveys.

The Commonwealth Secretariat has supported the CSIs in Trinidad & Tobago and Barbados by preparing guidelines, designing survey instruments and undertaking one-on-one capacity building sessions to designated staff.

CSIs face a number of challenges in attempting to track services, including low staffing levels, inadequate technical capability and lack of trust. However, the information obtained from regular surveys will go a long way in enhancing the value of CSIs and in shaping policy as well as strengthening service providers across the board.

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<table>
<thead>
<tr>
<th>BARBADOS:</th>
<th>VALUE OF THE SECTOR (B$M)</th>
<th>% OF THE SERVICES SECTOR</th>
<th>EMPLOYMENT</th>
<th>EXPORTS (B$M)</th>
<th>% EXPORT</th>
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<td>753.6</td>
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<td>Computer &amp; information</td>
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<tr>
<td>Royalties and licence fees</td>
<td>6.6</td>
<td></td>
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</tr>
</tbody>
</table>

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1 Barbados Economic & Social Report 2011
2 Calculated from UNCTADstat (2013)
Ultimately, a fully operational CSME will see an open market without cross-border restrictions and will facilitate the free movement of goods, skills, capital, services, as well as the establishment of businesses...
HOW WILL CARICOM
Service Providers Benefit?

THE MOVEMENT OF SERVICES AND PLANNED ADMINISTRATIVE REFORMS UNDER THE CSME

By Noel Watson PhD
CEO, A-Z INFORMATION JAMAICA LIMITED

INTRODUCTION

SEVEN YEARS AFTER ITS INCEPTION in 2006, and perhaps unexpectedly, the CSME continues to be a work in progress. While extensive actions have been taken by participating member states to establish legal and institutional arrangements for a functioning CARICOM Single Market (CSM), the full benefits from the establishment and operation of the CSM expected by stakeholders will not materialise unless there is full and effective implementation of the processes, measures and provisions required to establish businesses, provide services, move capital, trade goods and for ‘Skilled CARICOM Nationals’ to have the right to travel, live and work in a CSME member state of their choice.

The CARICOM Secretariat, through the Canada funded CARICOM Trade and Competitiveness Project in the CARICOM region (CTCP), is in the process of assisting member states to put these requirements in place to make it easier for nationals of CSME member states to access their rights under the Revised Treaty of Chaguaramas.

Ultimately, a fully operational CSME will see an open market without cross-border restrictions and will facilitate the free movement of goods, skills, capital, services, as well as the establishment of businesses (as depicted in Figure 1.1 below).

This article focuses on the Free Movement of Services Regime and tries to outline the likely treatment that this regime will receive as it relates to a) the certification of service providers, b) the process faced by the service providers at the port of entry of another member state, and c) extension of stay requests by service providers if additional time is required to complete a contract/assignment.

In terms of the free movement of services providers, the most relevant of the four modes of trade in services are Modes 3 (Commercial Presence) and Mode 4 (Temporary Movement of Natural Persons). Mode 1 (Cross Border Trade) requires no movement of persons; Mode 2 (Consumption Abroad) does not involve movement of the service provider. Mode 3 is relevant because the sole proprietor established in one member state may move as a natural person to provide services on a temporary basis in another member state. The relevance of Mode 4 is self-evident, as this is where the service provider moves temporarily to provide services in another member state.
HOW DOES THE MOVEMENT SERVICE REGIME OPERATE AT THE MOMENT?
Member states, through regional level decisions, have agreed on how the services regime should be operated, however it is yet to be implemented in the majority of member states. The above situation has resulted in the absence of a recognised regional mechanism under which service providers can move efficiently between member states. At the moment, most service providers move as if they are visitors/tourists. If the immigration officer asks the purpose of their visit, they typically say either a) meetings with the government; b) meetings with local businesses; c) vacation; or d) conference or workshop. Once they pass through the border, they then proceed to provide their service.

Many would argue that the status quo described above works and actually results in the free movement of service providers and the provision of services on a temporary basis, however it is unofficial, given that the service provider has no legal status within the member state. Some service providers may effectively be operating in the informal sector because they are not registered taxpayers in the country in which they are providing the service or may not even be registered in their country of origin. If the regional services industry wishes to grow and gain international recognition, it needs to become more formalised; this will facilitate the estimation of key variables, such as the number and composition of services providers, which can then be used to promote the industry on a global scale.

The process of becoming more formalised would include:

➔ the certification/registration of service providers;
➔ official procedures to deal with service providers before, at and after the port of entry;
➔ official procedures for an extension of stay if more time is required to complete an assignment.

WHAT ARE THE EXPECTED CHANGES TO BE FACILITATED BY THE CARICOM TRADE COMPETITIVENESS PROJECT (CTCP)?
One component will examine the processes under all five regimes and develop best practices that standardise and harmonise how administrative practices are carried out across the region. With respect to services, the best practices have been developed based on a combination of 1) requirements set at the regional level and implemented through decisions taken by the relevant organs of CARICOM and 2) the use of state of the art technology to facilitate efficiency and effectiveness of the processes.

A) CERTIFICATION/REGISTRATION OF SERVICES PROVIDERS

Under the Free Movement of Services Regime, service providers should register at the designated competent authority in their member state, for example, this is the Trinidad & Tobago Coalition of Services Industries (TTCSI) in Trinidad & Tobago (TT). In the ideal world, the respective coalition of services industries (CSIs) would act as the competent authority in each member state, however such designations have not been granted in other member states for a variety of reasons including: a) the preference of a public sector entity being the competent authority; b) CSIs do not have the capacity or have not been established; and c) legislation changes would be required to give such power to the CSI.

The competent authority would maintain an online register of services providers and would be the certifying authority. In order to register and be certified, service providers would be required to log-in to the CSME Regimes Administration System, which is a web-accessible data administrative system being developed under one component of the CTCP; to complete an online application form and scan or take a picture of required documents and attach them and send them electronically to the services desk, which is likely to be at the office of the competent authority. Apart from the application form, the required documents include a copy of the picture page of a valid passport, qualifications and proof of being a bona fide service provider. The online application would be moved electronically to members of a local services committee who will adjudicate and determine whether the applicant meets the criteria to be issued with the CARICOM Services Provider Certificate of Recognition (services certificate).

The committee will include the input of recognised authorities and references from clients of the service provider to verify that the required criteria are met e.g. competence in the specific field, has earned a living from the particular service, has a strong body of work, etc.

Once the application is approved, the service provider will be issued with an officially signed CARICOM Services Provider Certificate on special paper, which, as proposed under this consultancy, will be inserted in their passport by the Immigration Department (similar to a visa). This services certificate and the other information will be filed in the CSME Regimes Administration System and will give the service provider the right to enter other CSME member states to work as long as they have a contract and/or an appropriate letter of invitation with a clearly stated time period. The CSME Regimes Administration System is also being proposed under this consultancy and entails a shared system with web-based access that links all regimes across member states and facilitates the analysis of data and availability of information on a real time basis.
CRoSS boRdeR Supply

cross border

supply is when a service is supplied from a supplier in one country to a consumer in another and only the service crosses the border. this is most often done using electronic delivery, namely the internet.

example: A business man in canada hires a graphic designer in trinidad to develop a logo for his new business. the graphic designer emails the logo files. neither the business man, nor the logo developer leaves their respective countries to supply or consume the service.

ConsuMPtioN AbRoad

consumption Abroad is when a service is supplied in the country of the supplier, but to a consumer from another country (i.e. the consumer goes abroad).

Example: A tourist visits dominica to consume spa services.

COMMeRCial PREseNCe

commercial presence is when the supplier of a service establishes a presence in another country by setting up a subsidiary or branch, for example. the consumer then purchases the service from the subsidiary in their own country.

Example: An architectural firm in jamaica, sets up an office in the UK from which to offer their services.

MOVEMENT oF NaTuRaL PeRSoNS

Movement of Natural Persons is when a supplier of a service temporarily visits the country of a consumer to offer a service (i.e. the service provider goes abroad).

Example: A reggae band from Saint Lucia performs in Toronto.

THE FOUR M ODES OF SUPPLY

Services can be exported in four different ways. This is referred to as the Four Modes of Supply. The mode depends on the ‘origin’ of the service supplier and consumer.

MODE 1: CROSS BORDER SUPPLY

Cross Border Supply is when a service is supplied from a supplier in one country to a consumer in another and only the service crosses the border. This is most often done using electronic delivery, namely the internet.

Example: A business man in Canada hires a graphic designer in Trinidad to develop a logo for his new business. The graphic designer emails the logo files. Neither the business man, nor the logo developer leaves their respective countries to supply or consume the service.

MODE 2: CONSUMPTION ABROAD

Consumption Abroad is when a service is supplied in the country of the supplier, but to a consumer from another country (i.e. the consumer goes abroad).

Example: A tourist visits Dominica to consume spa services.

MODE 3: COMMERCIAL PRESENCE

Commercial Presence is when the supplier of a service establishes a presence in another country by setting up a subsidiary or branch, for example. The consumer then purchases the service from the subsidiary in their own country.

Example: An architectural firm in Jamaica, sets up an office in the UK from which to offer their services.

MODE 4: MOVEMENT OF NATURAL PERSONS

Movement of Natural Persons is when a supplier of a service temporarily visits the country of a consumer to offer a service (i.e. the service provider goes abroad).

Example: A reggae band from Saint Lucia performs in Toronto.

C) EXTENSION OF STAY

The procedures under this regime allow the service provider to seek an extension of stay if more time is required to complete the work. In this case, the service provider would be required to submit the documents online (or in person) to the relevant competent authority which will move it electronically to the Ministry of Labour. After this authentication process the service provider can go to the immigration department (not usually at the port of entry) and obtain the appropriate entry stamp. Given that the spirit of the revised treaty is to facilitate free movement rather than to stymie it, the process should not take a long time.

The recommended procedure at the port of entry of another member state is that the service provider presents the passport with the services certificate as well as the contract and/or letter of invitation to the immigration officer. The immigration officer will be able to check the details against the information in the regimes system. If the service provider has sent in advance (through the regime system) information relating to her/his contract and it has been approved by the relevant authorities in the country in which she/he will be working then a length of stay for work will be granted which is long enough to facilitate the completion of the contract (this will be reflected by an appropriate stamp in the passport). If the service provider did not provide the information in advance she/he will be given an “entry pending approval”. In this case, the service provider will have to submit the documents online (or in person) to the relevant competent authority which will move it electronically to the Ministry of Labour. After this authentication process the service provider can go to the immigration department (not usually at the port of entry) and obtain the appropriate entry stamp. Given that the spirit of the revised treaty is to facilitate free movement rather than to stymie it, the process should not take a long time.

b) Service Provider at the Port of Entry of Another Member State

The recommended procedure at the port of entry of another member state is that the service provider presents the passport with the services certificate as well as the contract and/or letter of invitation to the immigration officer. The immigration officer will be able to check the details against the information in the regimes system. If the service provider has sent in advance (through the regime system) information relating to her/his contract and it has been approved by the relevant authorities in the country in which she/he will be working then a length of stay for work will be granted which is long enough to facilitate the completion of the contract (this will be reflected by an appropriate stamp in the passport). If the service provider did not provide the information in advance she/he will be given an “entry pending approval”. In this case, the service provider will have to submit the documents online (or in person) to the relevant competent authority which will move it electronically to the Ministry of Labour. After this authentication process the service provider can go to the immigration department (not usually at the port of entry) and obtain the appropriate entry stamp. Given that the spirit of the revised treaty is to facilitate free movement rather than to stymie it, the process should not take a long time.

The procedures under this regime allow the service provider to seek an extension of stay if more time is required to complete the work. In this case, the service provider would be required to submit the contract extension online or in person to the competent authority (mentioned in the previous paragraph), which will deal with authenticating the application for extension. The process should be completed within 10 days and the service provider’s passport stamped accordingly.
CONCLUSION: BENEFITS
The implementation of the above transformational processes involving the interaction of people, processes and technology should propel regional services industries up with global standards. It will result in a powerful repository of the region’s services providers. One of the primary benefits to service providers will be the option of having their names and skills available online so that potential clients from all over the world can contact them. They will also be given the option of allowing clients to rate them based on performance so that other potential clients will be better informed. The regime system will also make life easier for immigration officers and prevent service providers from having to operate unofficially. A potential benefit to competent authorities/CSIs is that the fees charged for processing the services certificate plus any other registration fees will give them a revenue base that they can use to further assist services providers, including promotion of their services locally, regionally and internationally, thereby helping them to develop their businesses and to increase the export of services.

1 Dr. Watson is the CEO of A-Z Information Jamaica Limited which is currently contracted by the Caribbean Community to execute a project relating to the reform of administrative procedures and practices in the five regimes of the CSME. Dr. Watson thanks members of the CARICOM Secretariat for guidance and is also grateful to process owners in Member States for their vibrant input during consultations. The opinions expressed are those of the writer and are sometimes based on his interpretation of decisions made by the organs of CARICOM.

2 The registration of such services providers is discussed later in this paper.

3 Decisions to this effect have been taken at the regional level (http://www.caricom.org/jsp/single_market/entry_procedures_establishment_services.pdf).

4 It is possible for the competent authority to delegate the maintaining of the register to another entity (e.g. the CSI) but would retain the responsibility of certifying service providers.

5 The services committee will include representatives from the competent authority, the CSI, immigration department, Ministry of Labour, and CARICOM Focal Point.

6 This idea was proposed in reports as well as by persons during consultations. The idea has been favourably received during consultations.

7 Web access to the CSME Administration System will be granted to authorized persons across the Region. Access will be limited to the scope of the particular activity that is deemed relevant to them by the authorities in Member States and at the CARICOM Secretariat.

8 In TT the Competent Authority is the Ministry of Foreign Affairs (the section that deals with CARICOM matters)

9 This is a type of Angie’s list

GLOBAL SERVICES FORUM

SERVICES IN THE SPOTLIGHT

The Global Services Forum (GSF) is an annual event which brings together services leaders from across the globe to discuss strategies to strengthen the international services sector.

Jointly organised this year by the United Nations Conference on Trade and Development (UNCTAD) and the Ministry of Commerce of the People’s Republic of China, the event took place on May 28-29, 2013 in Beijing and ran parallel to the China International Fair for Trade in Services (CIFTIS).

The CNSC actively participated at the event on this occasion, represented by Lisa Cummins, Executive Director of the BCSI and Vice-Chair of the CNSC. Lisa spoke on one of the four high level panels – Creating and Promoting Partnerships, alongside the Honorable Amelia Kyambadde, Minister of Trade, Industry and Cooperatives of Uganda; Mr. Pascal Kerneis, Managing Director, European Services Forum and David Primack, Executive Director of International Lawyers and Economists Against Poverty, amongst others.

The Summit featured speeches from the Premier of China, Heads of Government of Sri Lanka, Fiji and Zanzibar, the Deputy Prime Minister of Singapore and the Secretary General of the United Nations. The UNCTAD Secretary General made specific mention of the important role of services coalitions around the globe.

The International Trade Centre (ITC) also played a prominent role at the event, organizing a workshop on May 30 following the GSF which highlighted the fashion sector and ITC’s new thrust in services.

The CNSC looks forward to playing an increasingly important role with respect to the international agenda on trade in services, bringing forward a developing country balance to the discussions.

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5 The services committee will include representatives from the competent authority, the CSI, immigration department, Ministry of Labour, and CARICOM Focal Point.

6 This idea was proposed in reports as well as by persons during consultations. The idea has been favourably received during consultations.

7 Web access to the CSME Administration System will be granted to authorized persons across the Region. Access will be limited to the scope of the particular activity that is deemed relevant to them by the authorities in Member States and at the CARICOM Secretariat.

8 In TT the Competent Authority is the Ministry of Foreign Affairs (the section that deals with CARICOM matters)

9 This is a type of Angie’s list
Lisa Cummins
EXECUTIVE DIRECTOR, BARBADOS COALITION OF SERVICE INDUSTRIES

The Caribbean Court of Justice ruling on the Shanique Myrie case against Barbados is an ideal example of positive developments emerging from a case that was overwhelmingly negative. Much time and energy has been spent pouring over the merits of the human rights elements of the case and that is important. But in addition to that aspect of the case, from the perspective of CARICOM officials and those who are committed to the regional project, the case forced the issues of freedom of movement for CARICOM nationals and indeed the status of the regional project itself into national and regional consciousness.

This was a case about free movement but it brought the entire integration movement into glaring perspective and hopefully, caused region wide introspection about our rights, responsibilities and obligations as member states.

*CARICOM nationals continue to face challenges with respect to free movement at our borders...
Barbados, for example, in 2006 was one of the six CARICOM member states that signed the formal declaration that signalled the launch of the CARICOM Single Market. The Caribbean Community Act, which was passed in Parliament and came into operation in 2005, clearly outlined the obligations of the state with respect to CARICOM nationals. Yet, CARICOM nationals continue to face challenges with respect to free movement at our borders, and in terms of the movement of goods and services, we continue to experience the application of non-tariff barriers to trade in importing countries. We have appeared to be unable or unwilling to resolve some of these issues that have plagued us for extended periods of time. The Court’s ruling is an alarm bell that there is judicial review for problems encountered which are perceived to be in contravention of our rights under the Revised Treaty and we can be held accountable for failing to live up to the obligations we assumed as member states.

Here is what I mean: over the past few years, for example, there has been an extensive discussion as to whether there is still political will across the region, at the level of Heads of Government, to move forward with deepening regional integration. That is one matter, and the subject of perhaps another discussion in terms of our collective vision for the region in the future, but the ruling of the Court puts that into its contemporary perspective; the ruling says to us, that we have already undertaken obligations in a number of areas and we must live up to them.

The court, through the dialogue the ruling has generated, has also forced us to acknowledge that there is a significant amount of public sensitisation that needs to occur across the region and at all levels on matters affecting Community relations. Many of our citizens still don’t understand the value proposition CARICOM presents. We have also been forced to recognise that the CCJ is indeed, not just in law, but in practice, the court of original jurisdiction on all matters of treaty application and interpretation and all member states are equally bound by its compulsory jurisdiction even if they retain the Privy Council as the highest appellate body. Additionally, the way in which we have approached many intractable trade disputes which are argued to be in contravention of one provision or the other of the Treaty, the CCJ is the most authoritative source of resolution.

These are some of the issues being looked at frontally in the dialogue now taking place in the region as a result of the Myrie ruling. That has a much larger implication for us as a region than the individual case itself, which has now found resolution for the aggrieved parties. We, as a region, must now find a resolution of our own and come to terms with the fact that we have had a long held vision for our oneness as a Community that was crafted by the visionaries of our past and left to be implemented by the administrators of the present and future. We must not fail them or ourselves and we must never regress. Even if we have not yet agreed on a shared vision on the way forward, we are bound by the one we signed on to which was sold to us by our forefathers and the fathers of many of our nations. We must move forward, for the imperatives which drove regional integration then still remain now, and have become even more relevant as the world has evolved.

The CCJ hopefully has caused us to come to terms with that unavoidable reality and hopefully will propel us to move forward, faster and as a Community even as we accept that we are obligated, at a minimum, to consolidate the commitments of the past.
What is the TISA? AND WHY SHOULD WE CARE?

By Peter Allgeier
PRESIDENT, COALITION OF SERVICES INDUSTRIES (CSI)

& Olivia Burzynska-Hernandez
POLICY ASSOCIATE, COALITION OF SERVICES INDUSTRIES (CSI)

THE TRADE IN SERVICES AGREEMENT (TISA) is the first international services agreement to be negotiated since the General Agreement on Trade in Services (GATS) almost twenty years ago. Since the implementation of GATS in 1995, the international trading environment has changed drastically. New technological advances, innovative business practices, new competitors, and widespread use of the internet have created unprecedented opportunities for trade in services, especially for developing countries. But the international rules have not kept up with these developments. That is why 50 member countries of the WTO have agreed to negotiate a plurilateral agreement on services to enable their services businesses to grow and to compete more effectively.

The TISA provides an opportunity to address the new issues in the services world and create a framework that will benefit countries around the globe. The participants in the TISA represent 70 percent of the world’s trade in services. Subsequently, the outcome of the TISA will be the de facto set of rules for international trade in services. Eventually, the TISA will be the point of reference for the WTO’s multilateral rules on services.

WHY DOES THE TISA MATTER?
Trade in international services facilitates all sectors of the global economy, including agriculture and manufacturing. Currently services employ 3.3 billion people around the world and contribute 70 percent of total world gross domestic product (GDP).

Overall, services are a powerful source of employment for billions around the world, particularly for women and youth. Of the countries polled by the World Bank in 2011, a majority had 70 percent or more women employed in the services sector.
This is also true on a regional scale. In Latin America and the Caribbean, the services sector accounts for 75 percent of the employment of women.

Services trade also benefits businesses of all sizes. Technological advances now give small and medium sized enterprises (SMEs) the ability to extend their customer base through mobile phones and the internet, engaging them in the global market and increasing the potential for economic success. In Africa, 19 out of 20 phones are mobile, allowing individuals to manage businesses, pay bills, and buy food and other goods by phone.

Supachai Panitchpakdi, former Secretary General of the U.N. Conference on Trade and Development (UNCTAD), recently noted that the services sector has the potential to “unlock inclusive and sustainable development”, thereby lifting living standards around the world.

Developing nations are already harnessing the power of the services sector in many areas, including information and technological development, healthcare, as well as tourism and transport.

The robust engagement of these sectors is a major inducement to foreign investors. As trade in services has continued to expand, the services sector has become the largest recipient of foreign direct investment (FDI), accounting for roughly 75 percent of total worldwide inflows. Due to increasing global market engagement, developing countries now receive over 50 percent of FDI from the services sector, demonstrating the increasing importance of services as a driver of economic growth.

SERVICES CONNECT THE WORLD
Businesses, whether they are in services, manufacturing, or agriculture, rely on digital tools to be successful. Whether it is using the internet to buy and sell items or using a mobile phone to track payments, most businesses rely on the transfer of data to manage their company, serve their customers, and compete in the global market. As digital trade becomes more and more prominent, global trading rules need to facilitate the movement of data across borders in order for businesses to be successful in global trade.

Modern production networks rely on tasks including cloud computing, data storage, the protection of intellectual property (IP), logistics, insurance, IT goods and services, and cross-border payments/credits. The use of these networks can be seen in SMEs and large companies across the globe. Services have become increasingly important in global value chains and have utilised the age of digital trade to become successful in the global market.

THE POTENTIAL OF THE TISA
The TISA creates the opportunity to develop an international set of rules and regulations necessary to manage the age of digital trade and to eliminate barriers that prevent the full potential of trade in services.

Why is the TISA such an optimistic negotiation? Like the GATS, the negotiations are confined to services which prevents the negotiations from becoming a hostage to impasses in other sectors. In addition, each of the parties in the negotiations has made an affirmative decision to join the negotiations.

Furthermore, most of the parties already have track records of negotiating services market access beyond their current international commitments. There has been a high level of collaboration and alignment among the principal players in framing the negotiations and the parties are committed to an agreement that produces results in the near future.

The TISA ultimately can form the template for the next generation of multilateral rules for international trade in services. As such, it deserves the close attention of all countries, including countries in the Caribbean who are striving to develop high-quality services industries.

Overall, services are a powerful source of employment for billions around the world, particularly for women and youth.
About LDCs
A recent International Trade Centre (ITC) Technical Paper¹ not only shows that Least Developed Countries (LDCs) do export services, but that many - nearly one quarter of them - are in fact net services exporters. This contradicts commonly held assumptions that export opportunities in trade in services are marginal in the trade aspirations and development trajectory of LDCs.

Did You Know?

Key Findings
• Without exception, all LDCs (for which there is data) are exporting commercial services².
• As a group, LDCs export a highly diversified set of services, recording exports in all 10 categories of services as per in the balance of payments³.
• LDCs typically run an overall services deficit, but as a group they tend to record a surplus in travel, reflecting the importance of in-bound tourism in their economies.
• Other than travel, LDCs most frequently do well in communications, construction, finance, and personal, cultural and recreational services in that order. 38 LDCs export financial services and/or insurance services.

Geographic Differences
For example, LDCs in Oceania are more likely to export construction services than LDCs in Africa, and are more likely to export personal, cultural and Recreational services than Asian LDCs. 38% of Asian LDCs manage to earn income from royalties and license fees, whereas only 19% of African LDCs and 20% of LDCs in Oceania do so. Haiti earns a net surplus on royalties and license fees.

How Much?
• LDC commercial services exports more than doubled (to US$22 billion) in the 6 years to 2011, growing at an average annual rate of 15%, much faster than the world average of 9%.
• The LDC share in total world commercial services exports is therefore increasing, but from a very low base. The LDC share is still only 0.6%, comparing poorly with their 1% share in total world trade.
• For the LDCs as a whole, commercial services are only 10% of total exports - about half the global average - and the services share is lower than a decade ago.
• For about half of the LDCs, however, the services share of exports is well above the global average.

¹ LDC Services Exports, Trends and Success Stories, ITC Technical Paper, July 2013
² Disaggregated data is not available for Afghanistan, Central African Republic, Chad, Eritrea, Kiribati, Mauritania, Somalia
³ Travel, Transport, Communications, Computer and Information services, Construction, Financial, Insurance, Other Business Services, Personal, Cultural and Recreational and Royalties and License Fees.
The current transformation of economies is resulting in the rapid growth of the service sector in emerging markets. Most of the OCED countries are already dominated by the economic contribution of the service sector with respect to their share of employment and GDP. Future growth of the services sector holds the key to the continuous upgrading of the societal welfare at large.

There are several reasons why the ongoing development of the service industry is important for emerging markets. The service industry has the potential to employ a larger share of the workforce. Getting people into the regular labour market accordingly boosts the underlying taxing possibilities and alleviates Government assistance. Additionally, women stand a much better chance of entering the labour market through the service industry. This enables a better gender equality over time in the economy. With rising incomes, the possibility for further expansion of the service economy is substantial. Services are also ‘greener’ and reduce the negative social and environmental effects of producing raw materials or low-end manufacturing.

As the world economy has become more integrated, services more encapsulated with manufacturing and value-added in production highly connected to specific locations, global production networks have become more common and have in turn supported further integration of distant markets.
Emerging markets can use the service industry to rise in global value-chains through these production networks. A skilled labour force in combination with a well-suited digital communication infrastructure, are vital in order to maximise on this potential.

Global production networks can be based within the manufacturing industry, where services are becoming a larger part of the final value-added, or can be based in the services sector; there are several examples where the knowledge intensive service industry is using different locations to make use of different competencies or the possibility to work across different time zones.

The creative or cultural industry, for example, is increasingly harnessing international talent and technological capabilities by establishing production networks. Video games, music or film production are using multiple locations for establishing the final output. This is an example of how emerging markets can develop their respective strengths in order to connect to the global market.

Asian emerging markets, for example, have developed strong regional production networks that have served as springboards for developing demand and supply in services. Many of the world’s fastest growing metropolitan areas are also found in Asia, which also offer growing markets for many kinds of services. As these economies become more mature, the demand for high end knowledge intensive services will also increase.

Emerging markets in other parts of the world such as Latin America and the Caribbean have other competitive advantages that could be exploited for growth of the service economy. The proximity to the large markets in North America is important and an increasing number of service providers are seeking to invest within the region. The strong tourism industry has also generated a solid platform that could be developed to capitalise on the mobility of people around the world.

In Latin America the growth of the so called Multi-Latinas, i.e. companies expanding rapidly across the continent, primarily in services, is one example of the expansion of the services sector across the continent. These can be found in retailing, insurance, banking and other highly dynamic sections of the service economy. The potential of increased market integration due to the usage of the Spanish language should not be underestimated. This, when compared to the problems of the service economy in Europe, where the various languages are acting as a barrier to trade for some services. The service economy in this region of the world shows great potential for the future.

In conclusion, services can be a significant part of the solution in developing sustainable growth in emerging markets. The service industry is essential for the future development of the emerging markets around the world.
In Haiti, services contributed 57% of GDP, 50% of employment and 16% of exports in 2011. While the services account is in overall deficit, net surpluses are regularly recorded in Travel and Communications.

Travel accounts for the vast bulk (84%) of commercial services receipts, highlighting the importance of in-bound Tourism. Tourism experienced a sharp drop after the recent earthquake, with net receipts on Travel plunging by 46% in 2010 but steadying to a 4% drop in 2011.

Communications accounts for 12% of services exports, growing robustly by 17% over the period 2005-2011, up by 76% in 2010 and 46% in 2011.

A variety of other commercial services, accounting for 4% of services exports, have also been growing strongly. Detailed data is not available to pin point these specific growth activities with precision, though Royalties and License Fees seem part of the story.

The Government’s “Strategic Plan for the Development of Haiti: An Emerging Country in 2030” targets the services sector as a specific priority. Many services activities remain largely informal. Priorities include the retail sector; improvement of sanitation, development of formal commercial streets and shopping centres, support for relocation and reorganisation of on-street services providers, construction or rehabilitation of public markets and construction of convention and exhibition centres.

Tourism is the key services export development priority. The contribution of Tourism to GDP and employment is still small. The contribution to GDP is forecast at 5.7% for 2013, up from under 2% in 2012. The total direct and indirect contribution to employment was estimated at almost 5% for 2012.

Haiti has the potential of other beach destinations in the Caribbean with the added value of its own distinctive character. Only the cruise ship industry has been active, but a recent agreement with Canadian tour operator, Transat, is expected to deliver increased numbers of in-bound visitors from North America. The country faces significant challenges if it is to achieve the desired development of sea-side resorts, eco-tourism, cultural and adventure tours, as well as pleasure boating and increased cruise ship activity.
The trading of commodities and services in the Caribbean has been driven by several reactive transitions, where Small Island Developing States (SIDS) progressively abandon uncompetitive industries in favour of more promising ones. The intervals between these transitions have only shortened in duration with the advent of globalisation.

As industrial giants like China and India reintegrate into the global economy and systematically structurally upgrade through the higher tiers of labour intensive industries, they “force” smaller countries to seek prosperity in trade elsewhere. This de-industrialising effect on global trade has led SIDS to transition out of the cheap labour market.

SIDS have also witnessed the demise of their agricultural industry. This is mostly due to traditional North American and European subsidies offered within their agricultural industries, fierce competition from Latin American producers and the loss of preferential access to European markets. Few SIDS were able to turn to their natural resources like Trinidad and Tobago did with its Liquefied Natural Gas (LNG) industry, as such endowments are extremely rare. Many others have taken advantage of their climate and natural beauty, to rapidly develop a prosperous tourism industry, as is the case in Barbados. However, the pressure is already building on SIDS to meaningfully diversify their services portfolio beyond an already mature tourism industry. There are several promising sectors open to them such as banking and financial services, information and communication technology, off-shore education and health services, and intra-regional transportation to name a few.

For SIDS to be competitive in the services sector, they will need to increasingly base their business and policy decisions on sound trade intelligence. In the 21st century, this has been relatively
easy to achieve for those engaged in the trade of physical commodities, as a number of accurate databases are readily available to businesses, governments and trade support institutions alike. This has not been the case with trade in services. By its very nature, trade in services does not provide an easy paper trail to follow the way trade in goods does, thus making the aggregation of any meaningful data difficult. The World Bank took up this challenge and in 2012 was able to present a different kind of database which they hope can achieve the same result: actionable intelligence on trade in services for the use of academics, service providers, governments and trade support institutions.

A FRESH TAKE ON TRADE DATABASES

Presently, the World Bank is attempting to build a database for trade in services through its new project called the Services Trade Restrictions Index (STRI). The manner in which the World Bank has chosen to overcome the difficulties collecting data for trade in services is to take the focus off monetary exchange for services and instead examine services
trade policies across 103 counties; where data from 79 developing countries and 24 OECD (Organisation for Economic Co-Operation and Development) countries was compiled including 18 service sectors from within 5 industry categories (financial services, telecommunications, transportation, retail distribution and professional services) and 3 modes of delivery (cross-border, commercial presence, movement of natural persons).

This data collected from these countries (which is also comprised of expert opinions) is used to measure trade restrictiveness and the scoring is based on a five-point scale ranging from trade in services being completely open to being completely closed (0, 25, 50, 75, 100). The World Bank also takes into account specific trade policy dimensions which include barriers to entry and ownership, operations and regulatory environment.

THE CARICOM SINGLE MARKET AND ECONOMY (CSME)

You’ve heard of the CSME, but maybe you’re still not quite sure what it means to you, below is an excerpt from the CARICOM Secretariat website:

The CARICOM Single Market and Economy is intended to benefit the people of the region by providing more and better opportunities to produce and sell our goods and services and to attract investment. It will create one large market among the participating member states.

The main objectives of the CSME are:
- Full use of labour (full employment), full exploitation of the other factors of production (natural resources and capital); and competitive production leading to greater variety and quantity of products and services to trade with other countries. It is expected that these objectives will in turn provide improved standards of living and work and sustained economic development.

Some key elements of the Single Market and Economy include:
- Free movement of goods and services – through measures such as eliminating all barriers to intra-regional movement and harmonising standards to ensure acceptability of goods and services traded;
- Right of Establishment – to permit the establishment of CARICOM-owned businesses in any Member State without restrictions;
- A Common External Tariff – a rate of duty applied by all Members of the market to a product imported from a country which is not a member of the market;
- Free movement of labour – through measures such as removing all obstacles to intra-regional movement of skills, labour and travel, harmonising social services (education, health, etc.), providing for the transfer of social security benefits and establishing common standards and measures for accreditation and equivalency.

CARIFORUM countries participating in the STRI are Trinidad and Tobago and the Dominican Republic...

WHAT’S THE BIG DEAL?
The importance of such a database should not be overlooked as 80% of GDP in the US and the EU comes from the services sector; and this figure is well over 50% in most other countries both OECD and developing. The US and EU are also responsible for over 60% of the world’s services exports, and services exports from the BRIC (Brazil, Russia, India, China) countries have increased by over 15% annually over the last decade. With such significant volumes of traffic in trade in services, it is easy to see how the STRI could benefit stakeholders in various ways; for example helping to understand how barriers to foreign service providers affect competitiveness, granting insight on services policy reform and clarity of vision for negotiators who are tasked with negotiating away policy barriers without the benefit of clear indicators as to what those barriers actually are.

Still in its infancy, the STRI has already made a few interesting revelations regarding policy patterns. As a region, the fastest developing Asian countries and oil-rich Gulf States exhibit the most restrictive policies regarding trade in services as opposed to some of the poorest countries whose domestic markets remain surprisingly open. Most OECD countries have been shown to be generally open, however they tend to apply greater restrictiveness on their transportation services as well as on the movement of natural persons as service suppliers. At the sectoral level, the STRI has also revealed that transportation and professional services across most countries (OECD and developing) tend to be the most protected services industries while trade in retail services, telecommunications and financial services are generally less restricted.
THE GOOD NEWS
Currently the only CARIFORUM countries participating in the STRI are Trinidad and Tobago and the Dominican Republic, and there are several good reasons listed above why greater participation by the Caribbean countries would be of value. However, the greatest advantage about being part of such an initiative would be at the national level, where any given administration would have a snapshot of current active policies which are helping or hurting their national development. With data in hand, a Caribbean country would be able to correct course and make the necessary policy reforms as needed.

Do bad service policies actually hurt? The World Bank argues that policy reform in a region will promote foreign investment for example, the STRI demonstrates that practices such as restrictions of foreign acquisitions, discrimination in the issuing of licences, restrictions on the repatriation of earnings, and lack of legal recourse all hurt foreign investment inflows into an economy. It can also be argued that a region with reformed policies would benefit from an enhanced access to services; for example the STRI has shown that countries which impose major restrictions on the establishment of foreign banks have less credit per GDP than countries which only impose operational restrictions. Lastly, in a region like the Caribbean, more streamlined services policies will facilitate connectivity, especially regarding intra-regional transportation.

1 Justin Lin’s research on “the middle-income trap” and structural upgrading in Latin America and the Caribbean
2 The Caribbean Papers: Beyond Tourism – The future of the services industry in the Caribbean (2008)
3 For example the International Trade Centre’s excellent “Trade Map” database
4 The service can be accessed online at http://iresearch.worldbank.org/servicestrade/
5 Cambodia, Ghana, Senegal and Mongolia
A service coalition is an organisation of stakeholders related to the services sector. While the stakeholders may have diverse interests, they do share a common one – the development of the services sector. A service coalition may have many objectives and perform various functions, however, ultimately, the objective of this organisation is to enhance the international competitiveness of the services sector and increase service exports.

The coalition movement began in 1981 in the UK, followed soon thereafter in the US. In 1997, the concept was raised in the Caribbean and by 2001, at a CARICOM Council for Trade and Economic Development (COTED) meeting, it was agreed that national coalitions of service industries should be established in every member state.

Twelve years later, here we are! There are actively functioning coalitions in Antigua & Barbuda, Barbados, Belize, Dominica, Dominican Republic, Grenada, Jamaica, Saint Lucia and Trinidad & Tobago. As critical as these organisations are to the region’s economic development, they continue to struggle with resource challenges, and a lack of support and understanding.

It is important to get involved in the activities of your local CSI. Contact them (the details are on page 85), become a member, support trade in services events, participate in the online discussions on Facebook, keep abreast on trade in services happenings by subscribing to the CNSC and national newsletters, encourage your government representatives to support the establishment of coalitions where there are none and where they do exist, to provide adequate resources to enable the organisations to effectively carry out their mandate.

This section will serve to update you on the major coalition news in our region. Read on.
ANTIGUA AND BARBUDA
ABCSI, launched in 2011, is one of the younger active coalitions in the region. Manned by one full-time staff member, ABCSI hosted several significant events over the past year focusing primarily on the themes ‘access to finance’ and ‘access to markets’. During the year, the organisation participated in a fashion related trade mission to Guadeloupe alongside TTCSI, hosted an anti-money laundering and FACTA workshop, co-hosted Caribbean Export’s grant and proposal writing seminar and – their highlight of the year – elaborated an export workshop entitled Internationalise Your Business. This workshop took place in collaboration with the Caribbean Centre for Competitiveness at UWI and the UK Institute of Export. ABCSI participated in ISO training and continuously supports the adoption of international standards in Antigua and Barbuda.

ABCSI actively participates and advocates for services in many trade-related forums, maintains a Facebook group which highlights national and regional trade issues, provides advisory services to service providers regarding exporting and business development and is actively participating in the development stages in the creation of the OECS business council.

The organisation has thrived on creativity and strategic alliances since its inception and has developed a database of over 2000 local and regional partners.
ANNUAL PUBLICATION 2014

BARBADOS
2013 proved to be a very impactful (and busy!) year for the BCSI and for Barbados services sector. The BCSI, with support from the Commonwealth Secretariat elaborated a major initiative which will serve for several years going forward – a national service sector development strategy, which was complemented with an asset mapping database. Another critical and related study undertaken was an assessment of the professional services sector which sought to establish the current capabilities of the sector, international opportunities in the way of unmet market needs and a comparative analysis to determine if and how Barbados can meet these needs.

BCSI also moved offices, hosted their inaugural National Services Week, launched a training programme for professionals in the health and wellness sector in collaboration with the TVET council, recently supported Global Entrepreneurship Week, hosted their 10th AGM, as well as several other activities. 2014 will see the implementation of the strategy unrolling.

BELIZE
2013 has been a defining and highly active year, in which the newly established BCSP secretariat, with the assistance of grant funds from the CDB (CARTFund) and the Government of Belize, demonstrated its credibility and value to the Belizean services sector by undertaking the first ever baseline survey of priority services sectors. Based on the results of this survey individual service firms were selected to work with a consultant to develop export strategies and roadmaps.

The BCSP also held the first ever Services Week, which concluded with the election of an energetic and engaged new board of directors. Currently, the BCSP is assisting with the formation of the Spa & Wellness, ICT and Contractors Associations, incubating the newly formed Medical Tourism Association and strengthening the Architects, Engineers, Real Estate Brokers, Music, and Audio-Visual Associations.

In addition to the development of a state of the art website and maintaining active FB presence, the BCSP has been proactive in raising awareness of the importance of the service sector to Belize’s economy and the potential for the export of services through its monthly newsletters and infomercials and is currently engaged in the production of part 1 of a video documentary named “Journey to Export” which introduces the 9 service firms engaged in the export strategy consultancy and documents their first steps towards their export success. The BCSP will be assisting the priority sectors and individual firms implement their export strategies in 2014 and will document that assistance in Part 2 of the video documentary.

DOMINICA
2013 was a challenging year for the DCSI primarily as a result of staff reductions due to declining financial resources (both donor and government). This consequently had a negative impact on the services that could be offered to the organisation’s stakeholders, its membership in particular. Despite the challenges, the DCSI was able to successfully undertake three major activities:

1. The commencement of a consultancy for the development of a service sector policy and expansion plan. It is anticipated that this will be completed by the end of 2013 and implemented in 2014;
2. The development of a service sector profile database, which was preceded by a data collection drive in priority sub-sectors (Cultural/Creative Industries, Construction Services, ICT, Health & Wellness, and Management Consulting);
3. The formation of two priority sector associations (audiovisual and health and wellness).

In order to address their financial challenges, the DCSI has been able to galvanise the support of its membership for an increased financial contribution to its operational budget and will be engaging in a strategic partnership with the manufacturers association.

DOMINICAN REPUBLIC
The DR Coalition (Coalicion de Servicios de Republica Dominicana) CSRD, was launched in December 2012 and has been actively working with the different member associations on priority sector strategies since. For example, CSRD is supporting the establishment of the DR Chapter of the Caribbean Institute of Certified Management Consultants and has co-organised several events including the consultation of the wellness sector at the request of Caribbean Export.

CSRD is also actively participating in forums supporting service sector development both nationally and regionally.
In November 2013, CSRD became a member of ALES (Latin America Association of Services Organisation) and made a presentation about the CSI model in ALES Conference in Peru. In the meeting, CSRD also spoke about CNSC and explored the possibility of wider linkages with the Caribbean.

In the framework of meeting between DICOEX (Ministry of Industry and Commerce) and the OECS Secretariat, the CSRD also proposed a potential cooperation agenda with OECS CSIs for 2014.

**GRENADA**
Check out the full feature on the GCSI on page 42.

**JAMAICA**
This was an important year for the JCSI; they finalised and launched their national Service Sector Strategy and Expansion Plan, a project they undertook in collaboration with DFID and which will serve to guide to the development of six (6) service sectors over the next three years. Implementation has begun in earnest for these sectors of focus including Wellness Tourism, Medical Tourism, Creative Industries-Music, ICT, Management Consulting and Offshore Medical Education/Education Tourism.

JCSI also participated in a number of key events such as the Global Services Forum held in May 2013, the 5th Management Consulting Business Symposium September 10-12th and the UNCTAD Regional Dialogue on the Promotion of Services in Latin America and the Caribbean held in November 2013. The Coalition also hosted a series of focus groups which identified gender issues that may be prevalent in the key service sectors of focus, as well as the Caribbean Export Development Agency Spa and Wellness Roadshow.

JCSI was appointed as the Executive Chairman of the Caribbean Network of Service Coalitions in March 2013.

**ST. KITTS AND NEVIS**
St. Kitts and Nevis Coalition of Service Industries was first launched in 2008, however the organisation did not gain much traction since then. The Ministry of International Trade, Industry, Commerce and Consumer Affairs of St. Kitts and Nevis, including the EPA Implementation Unit, has been spearheading a revival of the coalition alongside the current SKNCSI task force.

In 2013, a project was undertaken in collaboration with the Commonwealth Secretariat to draft a new constitution for the organisation, as well as a communication strategy. The Ministry through the EU-funded Sustainable Development programme contracted a legal consultant to review and finalise the by-laws in July of this year. The GIZ offered technical assistance with respect to these efforts.

It is anticipated that the coalition will be re-launched in 2014.

**SAINT LUCIA**
SLCSI undertook an innovative and foundational project over 2012-2013 – The Export Development Platform for Trade in Services. Through coaching and training, this project supported twenty companies across four service sectors – ICT, Health
The SLCSI also provided support for the establishment of mutual recognition agreements between regional and EU architects and hosted a National ICT Forum which served to mobilise key IT service providers and strengthen the ICT Association (SLICTA).

Read more about it on page 51.

TRINIDAD AND TOBAGO
TTCSI, as one of the more active coalitions, had another typically busy year, culminating most recently in the launch of Services of the Caribbean (SOCA), a Caribbean private sector coalition designed to promote the enhancement of the United States Caribbean Basin Initiative (CBI–CBERA). The launch of SOCA was preceded by the hosting of TTCSI’s 6th Annual Services Week and 3rd annual Excellence in Service Awards programme.

TTCSI also collaborated on strategies for the medical tourism sector and the fashion industry and hosted numerous workshops including: Trade Policy and Climate Change, Grant and Proposal Writing and Doing Business with the French Caribbean Outermost Regions (FCORs).

In an example of innovation and meeting members needs, TTCSI also partnered with exporTT this year to provide co-financing to service providers seeking to export their services and who may have been financially constrained from doing so. The objective of this initiative is to increase services exports, thereby supporting economic growth.

TTCSI hosts a weekly radio programme entitled, Spotlight on Services and actively maintains a Facebook presence – join the conversation!
As the Caribbean Network of Service Coalitions (CNSC) continues to expand and grow, its members, the CSIs, continue to look for opportunities to strengthen their organisations both at the national and regional levels. Based on the common needs of the group, two key projects were identified.

The first project, CSI Sustainability Framework, will seek to identify key actions or activities that will support sustainability and will also address other institutional strengthening needs. The Framework will focus on a more cohesive approach to meeting the needs of SME service providers, while collaborating more fully with all key stakeholders including sector associations, trade promotion organisations and donor agencies.

The Sustainability Framework will be based on practical strategies utilised by other member-based international trade support organisations and will feature a ‘menu’ of sustainability enhancing activities and initiatives and an implementation plan for each of these activities.

In addition to significant improvement in member services, another key result of this project will be an enhanced harmonisation of efforts between CSIs reducing duplication and maximising on resources.

The other project, Service Exporters: Train the Trainer Programme, is being developed to enhance the export capacity and success of service providers. The highly relevant, high quality programme will include 10-12 training modules organised into a 4-stage Roadmap that will fast-track SME service providers through the various stages of export preparation. The programme will be offered through the coalitions and will be delivered by a cadre of trainers who will have been certified to deliver the training. The Train the Trainers Programme will also serve to support the sustainability of the coalitions by offering a high-quality, chargeable service to their members. Keep your eye out for this training, which will be offered across the region in 2014.

Both the CSI Sustainability and Service Export training programme will feature a variety of world-class tools, templates and strategies that will result in success for all – service providers, coalitions and other service sector stakeholders. CNSC wishes to thank GIZ and Caribbean Export for their ongoing support and continued collaboration. For more information on these programmes, contact Ginelle Greene, GIZ, at ginelle.greene@giz.de.
Successful Coalition

By Doreen Conrad, CITP
INTERNATIONAL TRADE CONSULTANT

Persuance is an important attribute as well, as the establishment and promotion of a coalition may face many challenges....

**TIPS FOR A Successful Coalition**

**HAVING SET UP AND PROVIDED** advice on successful services sector coalitions in developing countries, the most important observation is that the key success factor is a committed and passionate champion. Perseverance is an important attribute of this champion, as the establishment and promotion of a coalition may face many challenges. Influence may also be necessary: one Asian coalition was headed by a Federal Deputy Minister in the initial planning stages then managed by the private sector.

As awareness about the importance of services is usually low, a solid communications plan is necessary to communicate with all stakeholders, the media, and potential members in order to promote the sector’s development and the role of the coalition toward that goal. Since there are over 155 services sub-sectors, many coalitions initially focus on a sub-set, such as business-to-business services, which is helpful in developing a more effectively targeted outreach plan.

Consultation with stakeholders and potential members will provide valuable input with respect to their needs. It is important to focus on these needs in order to remain relevant. These needs might range from the negotiation of agreements with target markets on mutual recognition of professional credentials, to encouraging supportive policy reform, to negotiating market access, or resolving market access barriers. Each service sector could have different interests, but the coalition should focus on being cross-cutting.

In working with stakeholders, workshops have been helpful in discussing needs and deciding on priorities and collective interests. Input to the eventual strategic plan will be helpful. A funding plan should also be developed and sources of financing could likewise be discussed as a team, since coalitions require financial and other resources to survive. Some coalitions have approached foreign embassy staff for donations or grants, highlighting the importance of the service sector and contribution to local GDP, which is significant in most countries.

Benefits should outweigh the membership cost. Meeting or exceeding
members’ needs will provide valuable word-of-mouth referrals to additional potential new members and will retain existing members.

Focus on providing services and benefits not already offered by associations and chambers. Position the coalition as an over-arching service sector organisation to avoid being perceived as a competitor or duplicating services offered elsewhere. For example, perhaps exporting assistance or developmental support may be a gap the coalition can focus on. Remember that many services professionals may already belong to their particular industry association or a Chamber of Commerce and the coalition needs to clearly define its focus to attract these potential members.

Forge partnerships with government, which may include policymakers and other sector-specific Ministries in order to achieve goals. Decide on potential international partner organisations, including services coalitions. As there is usually fairly sparse service sector knowledge and expertise, staffing of the coalition may be a challenge and these partnerships could be helpful in providing referrals or other suggestions, if necessary. As well, there may be services coalitions in other countries which host regional meetings and conferences where valuable lessons can be learnt.

Finally, develop a performance evaluation system to continue to be relevant and to monitor and report achievements. Communicate regularly with members, using technology whenever possible to assess their satisfaction levels and to be transparent. Continually promoting awareness about the sector and the coalition is absolutely key to developing the services sector.

GRENADA COALITION OF SERVICE INDUSTRIES (GCSI)

A committed and energetic Executive Secretary and an active and dedicated Board of Directors

The Grenada Coalition of Service Industries is running a lean operation. With a minuscule budget, a staff complement of one and an eighty square foot office space within the Grenada Industrial Development Corporation complex, one might think it is unlikely that the GCSI could make much of a positive impact on the development of the services sector in Grenada.

One would be wrong.

The objective of the GCSI is to support the development of the services sector in Grenada, Carriacou and Petit Martinique. The organisation began operations in May, 2011. The official launch of the organisation took place a year later in March 2012, under the auspices of the Honourable Tillman Thomas, then Prime Minister of Grenada.

 Though the resources available to the organisation are limited, the organisation can boast a committed and energetic Executive Secretary and an active and dedicated Board of Directors. This year the GCSI undertook a series of foundational activities that will serve as a launch pad for the organisation going forward.

These activities include:

• The hosting of the inaugural annual general meeting, where a diverse, high-profile Board of Directors was elected to oversee the running of the GCSI. Board Members include representatives from the ICT sector, cultural industries, professional services sector and construction sector;

• The development of a strategic plan in collaboration with the Commonwealth Secretariat;

• A membership drive, alongside membership strengthening activities;

• The hosting of a business to business forum between the St. Lucia and Grenada in the Health and Wellness sector, in collaboration with the St. Lucia’s CSI;

• The hosting of the first workshop (2 day event) in a series aimed at building awareness and enhancing competitiveness.

The GCSI is presently developing awareness enhancing tools that will serve to strengthen its reach in Grenada, as well as regionally.

Within the next 12 months the GCSI intends to undertake a mapping of the Grenada services sector, significant public relations regarding the organisation and the services sector, as well as capacity building activities including a workshop on intellectual property and the fashion industry being planned in collaboration with the World Intellectual Property Organization (WIPO)

While the organisation looks forward to continued success, it also maintains hope for additional support, enabling the GCSI to implement fully its strategic plan and to make quicker and more wide-reaching progress.

The GCSI invites Grenadians to learn more about this important organisation by emailing questions to the secretariat at gcsi@spiceisle.com.
services

success

It was noted earlier in the magazine that our region’s service providers are not taking advantage of the export opportunities available to them and while this holds true for the most part, there is an increasing number of service providers, whether through participation in initiatives such as the GIZ supported fashion event, The Gallery Berlin; SLCSI’s or BCSP’s export projects; Caribbean Export’s various initiatives or on their own steam, that have begun exploring regional and extra-regional opportunities.

This section highlights some of our region’s successful services exporters and seeks to demonstrate that a service provider does not need to be big or capital-rich rather, they need to be positive, innovative and committed to exploring export opportunities.

Are you a successful service exporter? We’d love to hear from you.
WHAT DO SUCCESSFUL SERVICES exporting companies in Asia, Africa, South America and other places around the world have in common? They are guided in their business activities by imagination, ingenuity, creativity and innovation.

- An Indian company is harnessing the clout of the internet by offering matrimonial services online.
- A consulting company in South Africa enables consumers, including people with no bank accounts, to purchase electricity using a mobile phone.
- A firm in Kenya specializes in the export of tour operator services and safari arrangements, which offer such exotic experiences as Maasai warrior training (imagine hunting a lion with a spear).
- An agency in Argentina is teaching tourists how to dance the tango, provides professional dance partners, practice sessions and entertainment.
- A company in Malaysia exports healthcare services and related research and development, including digital autopsy services.
- In the Philippines, a company provides call centre services, such as customer service, technical support, chat and e-mail services. In just seven years, it became the largest outsourced call centre company in the world. Ingenious service offerings have an excellent chance to succeed, as many have never been offered before. Creative service providers often enhance the quality, uniqueness and benefits of what they sell, to the point of becoming world class leaders.

Innovation is a way of life in service industries in general and for purposes of staying ahead of the competition in particular.

Twenty eight such companies are featured in the publication by the International Trade Centre (the joint agency of the World Trade Organization and the United Nations), titled “SERVICE PIONEERS - STORIES OF INNOVATIVE ENTREPRENEURSHIP”. http://legacy.intracen.org/publications/Free-publications/Service_Pioneers_English.pdf

As you examine each case, remember to look for the guiding principles of imagination, ingenuity, creativity and innovation, and think about your business and how it could be guided in a similar manner.

Imagination is more important than knowledge.
Knowledge is limited.
Imagination encircles the world.

ALBERT EINSTEIN
A Tactical Choice!

GUYANA PEOPLE'S CHOICE SERVICE PROVIDER FOR 2012

The most peculiar thing about Tactical Branding (Guyana) would be the way its owner, Sharon Lalljee-Richard, chooses to work.

FROM THE OUTSIDE, ALL SEEMS RELATIVELY TYPICAL – a well respected advertising establishment with over seven years of success along with an impressive list of clients, all of whom provide a rich portfolio of thriving brands stretching across multiple segments and industries. A deeper scratch beyond the surface, however, reveals a somewhat surprising organisation. One in which ‘big-agency creativity’ is being produced by virtue of a relatively small agency structure. In other words, no cluttered departments with traditional agency staff relishing themselves in classic coffee binges, cigarette breaks and brainstorming brawls. No tired-eyed graphic artists sporting mad hair and body piercings. No hyper-active account executives scurrying between their office phones and the art-room. No frills and no drama. Just a small unassuming group of professionals, working independently and meeting when there’s absolute need to do so.

“Passion makes all the difference in this business. It drives you to achieve the impossible – in our case, deploying minimal resources, to get the job done well and in record time. Small, developing economies, such as ours require that we be smart about time management and the way in which we engage the limited talent resource we have left in Guyana,” said Sharon. While remote assistance is offered by her photographer, video-editor, sound engineer and the occasional make-up artist, all core concepts, copywriting and designing are done by Sharon personally from inside her theatrically coloured office. She creates every pixel and tagline, while retaining her responsibilities as Creative Director of Tactical Branding – an odd, but delightfully inspiring, modus operandi for advertising entrepreneurs within her class.

Passion makes all the difference in this business. It drives you to achieve the impossible...

SHARON LALLJEE-RICHARD
Sharon has been the silent architect of numerous marketing campaigns, which have incorporated a wide skill set...
but I assure you, you can certainly possess both ends of the spectrum, if you care to. So work on it, starting now.

2. Ensure you master the art of patience. You will constantly need to toil through long hours, paying attention to the finest detail amidst the tensions of impossible deadlines and you will be sure to encounter more than your fair share of clients who will test your sanity.

3. Be passionate about your work and producing great results, but resist the urge to become too emotionally attached to anything you produce because when you arrive at the ‘client approvals process’, you will likely suffer many broken hearts throughout your career. Try not to let this ruin your inspiration or question your career path. Advertising is a wonderfully rewarding business, suited for the select few who are crazy enough to actually be good at it.

Sharon also had some words of wisdom to offer corporations working with advertising agencies:

1. Never tolerate an agency working for you and your competition. It is becoming increasingly popular for agencies in the region to do this and it makes for bad business when it comes to your corporate secrets and matters of brand confidentiality. Agencies may be quick to state that different teams work on the campaigns of competing businesses. Don’t buy it. Choose an agency that embraces the policy of not working with competing brands. This ought to be standard agency etiquette, a matter way above the issue of profits.

2. Providing you have followed my advice in point #1, be completely open with your agency about your sales figures, brand failures and successes. Your agency is far more likely to generate effective ad campaigns to achieve your objectives if they know the whole truth about your business and the sector. Remember, your agency is to your business, what your doctor is to you.

3. Have the courage to trust your agency’s creative recommendations, as long as they can effectively justify how their ideas will achieve your objectives. Too many corporations never reach their full profit potential because of fear: fear of being different, fear of being challenged by their competition or fear of making a promise to their consumers. Just once, resist the urge to be too over-protective of your marketing mix. Chances are, your sales figures will grow to surprise you favourably.

Tactical Branding was awarded “People’s Choice Service Provider 2012” by the Guyana Coalition of Service Providers last May. They are currently in the process of upgrading their offices and Sharon believes that the move from the hectic city of Georgetown to the new and tranquil district within a gated community will work wonders for her and the team’s creative inspiration. Visit them at their virtual address: www.tacticalbrandinggy.com, or check out their Facebook business page: Tactical Branding (Guyana); to get connected and join their fan base.
SINCE 2008, EVERY FIRST WEEK of November, the Trinidad and Tobago Coalition of Service Industries celebrates services. National Services Week is an annual event that highlights the valuable contribution of the services sector and raises awareness about this critical sector with the view to generating support for its development. This year, from November 5–9, 2013, the TTCSI hosted its sixth annual National Services Week under the theme, “Services Export: Dream it, Do it!”

TTCSI kicked off this year’s Services Week with its third Annual Excellence in Services Awards. This awards programme recognises champions in the services sector for their outstanding performance and contribution to the growth and development of Trinidad and Tobago. The awards programme also seeks to inspire innovation and enhance competitiveness through example.

Autistic Society of T&T
This award for service excellence was given to the Autistic Society of Trinidad & Tobago, a non-profit organisation, for its fine efforts in advocacy, training and education. These efforts were undertaken with limited resources, including an active team of dedicated volunteers.

The Autistic Society has been operating for the past 23 years and was the first parent support group for families and individuals with Autism Spectrum Disorders (ASDs) established in the Caribbean region. Currently more than 500 families are registered with the organisation. It is estimated that there may be more than ten thousand individuals with Autism Spectrum Disorders living in T&T.

Though the group does not receive a government subvention, it has successfully managed to acquire land and a building via donations and sponsorship.

The Autistic Society’s commitment to high quality education and family support is evident. We celebrate this.

Please meet this year’s winners and role models!
Caribbean Heart Care
MedCorp Limited

CHCm provides cost effective cardiac care to patients in Trinidad and Tobago and the wider Caribbean. The company’s goal is to make open heart surgery and advanced cardiac care readily accessible to patients suffering from cardiovascular diseases in the region.

Prior to its formation, there were no open-heart surgical procedures being performed locally. The prevailing trend at that time was that patients requiring heart surgery and complex cardiology procedures sought these services outside of Trinidad.

CHCm has established a strategic alliance with ASCARIO Cardiovascular Institute in Venezuela, enabling the company to benefit from ASCARIO’s thirty plus years experience and making it possible for CHCm to offer its cardiac patients 24-hour access to both heart surgery, as well as cutting-edge cardiology services — the only health care provider in the region boasting this level of service.

Over the past 20 years, CHCm has grown both in experience and expertise and now perform 300 to 400 heart surgeries annually, including highly complex paediatric cases.

We honour CHCm’s regional focus, innovation and commitment to customer service excellence.

Best New Service

CIL Dry Cleaners & Laundry

In September 2012 CIL Dry Cleaners and Laundry was established. What makes the company unique is that they offer a concierge-style dry cleaning service-free pick-up and delivery to consumers at their home or office anywhere in Trinidad, six days a week.

CIL operates one of the country’s largest commercial laundry services and employs over fifty staff members, most of whom reside in the surrounding communities.

CIL is being celebrated for how well the company navigated its first two years of operations, as well as for its innovation and high levels of customer service.

Best Young Service Provider of the Year

Christian Boucaud

Christian Boucaud, a fashion designer, started her label, Christian Boucaud Designs, in 2003. Boucaud designs timeless pieces with a Caribbean emphasis. She has provided designs for local and international celebrities including soca star Patrice Roberts, Michelle William from popular girl group Destiny Child’s, as well as for the artists of a popular Japanese soca group. Her label can be found in boutiques in the US, Japan, Australia, Canada, Montserrat, as well as other Caribbean islands.

Boucaud was awarded for her great entrepreneurial and managerial skills.

Service Exporter of the Year:

Fojo Design & Develop Ltd.

Fojo Design is a mid-sized, fast growing, regional construction design and development firm. Over the last several years they have completed projects in St. Lucia, Grenada, St. Kitts, Dominica, Suriname, Florida and of course, Trinidad and Tobago.

The company stays on the cutting edge incorporating Green Design, CADD, Smart Building Technology and Building Information Modelling into its efforts. It has developed a reputation for producing projects that are practical, cost effective and aesthetically appealing. Congratulations go to Fojo Design for their regional and environmentally-friendly focus.

The awards programme also seeks to inspire innovation and enhance competitiveness through example.
Resonance Trinidad Limited
For the second time in three years, Resonance has won the Best Use of Innovation award. Resonance Trinidad Limited is the leading provider of mobile, electronic and web based services in Trinidad and Tobago. The company was established in 2006 and aims to become the leading provider of mobile and electronic transaction services throughout the Caribbean and Latin American Region.

This year Resonance created Trinidad and Tobago’s first mobile payment platform service called Yooz. In fact, according to Resonance, this is the first fully secure and universal mobile payment platform in the Caribbean. Yooz offers anyone with a mobile phone in T&T the ability to top-up a handset securely and directly from their bank account or credit card.

We celebrate Resonance’s ongoing commitment to innovation.

Trinidad & Tobago Green Building Council
Founded in 2010, the TTGBC is a member-driven organisation and the most significant advocate of sustainable design in Trinidad & Tobago. Their mission is to transform the way T&T’s buildings and communities are designed, built and operated, enabling an environmentally and socially responsible, healthy and prosperous environment that improves the quality of life.

TTGBC is being celebrated for the excellent work they have done with their members and wider community by way of policy development, training and raising awareness regarding the benefits of ‘green’ construction.

Dr. Rae Furlonge
Dr. Rae Julien Furlonge is currently employed with the Trinidad Newsday as an engineer/journalist. He has been a weekly columnist with the Newsday business supplement for the last eight years and has a great passion for writing on T&T’s transportation issues. His piece ‘Our Transportation System is in Crisis’ took the Best Services Sector Feature award.

Furlonge is being honoured for successfully raising awareness on critical issues related to the services sector.
The SLCSI has developed a comprehensive Management Action Plan (MAP) which will guide its work programme for the next three years (2014-2016). A strategic overview of the key elements of the plan includes: stakeholders, strategic priorities, core services and programmes, guiding principles and the organisational structure required to achieve results. The strategic priorities include among others: leveraging regional and sub-regional links and resources for the benefit of Saint Lucia and the region; promoting and assisting in the development of strong and exporting services sectors through meaningful public-private partnerships; developing a cadre of services which builds on projects already implemented, as well as ensures a steady income/revenue for the SLCSI; and ensuring benefits to its members/stakeholders.

In 2011, the SLCSI was awarded grant funding from the Caribbean Aid for Trade and Regional Integration Trust Fund (CARTFund) for the
execution of a 21-month project entitled "Developing Saint Lucia’s Services Sector". The CARTFUND was established by the United Kingdom (UK) government and is administered by the Caribbean Development Bank. It is part of the UK government’s overall regional strategic support programme to generate momentum on the implementation of the CARIFORUM EU Economic Partnership Agreement and the CARICOM Single Market. The project is also supported by the Government of Saint Lucia through counterpart funding.

The major outputs of the project included creating an enabling environment for trade in services through the development of policy recommendations; developing the capacity of firms within the services sector to exploit export opportunities; as well as increasing the capacity of the SLCSI to drive the expansion of Saint Lucia’s services sector.

As part of the project, the SLCSI commissioned a study on the services sector which was intended to serve as a background document for the development of a national services policy for Saint Lucia. The document provided a review of the trade performance of Saint Lucia in services and then examined particular targeted sectors in order to identify what kinds of policy interventions would improve the overall regulatory and economic environment in these sectors. The document also identified factors that may hinder the international competitiveness of the sector. Four service industries were identified as priority sectors: professional services (management consulting, accounting, architecture and engineering); health and wellness services; creative industries; and information and communication technologies.

The paper recommended that in order to develop a competitive services sector in a small economy like Saint Lucia it is critical to have in place the following:

a) a clear policy and regulatory framework for services;

b) access to affordable finance for services firms in the local economy;

c) investment in people – skilled workforce and standards;

d) strategic partnerships to fit into global value chains.

In attempting to address the supply side constraints, the project assisted approximately twenty (20) firms in identifying high potential export markets and enhancing their capacity to export to these markets. These firms were supported through an 8-month coaching period and a four pronged “Road Map” approach, which resulted in the preparation of export and market entry plans. Approximately thirteen (13) firms from the ICT, creative industries, health and wellness and professional services sectors prepared and participated in market visits to “best bet” markets. The priority markets for most of the companies were the OECS and larger markets of the CSME: Barbados and Trinidad. The French markets of Guadeloupe and Martinique were also explored for opportunities to forge strategic alliances and co-production in the audio-visual subsector. These market visits presented services providers with an opportunity to evaluate their offerings vis-a-vis the actual demands of the host markets and to assess deficiencies and strengths.

An evaluation of this component of the project was conducted and the feedback from participants was extremely positive, particularly as it relates to the overall impact on their respective firms. The need for further support to increase service offerings in the export market was also highlighted. These needs included additional coaching and marketing, financial assistance for participation in trade missions as well as regional and international event and technical skills enhancement.

Several valuable lessons were learnt and best practices evolved from the implementation of the CartFund project.

The coordination and collaboration between the CDB Consultants, the SLCSI Secretariat and the Nex Consulting team, created the "success formula". Consequently, the SLCSI secretariat is better equipped both at the technical and administrative level to execute projects of this magnitude and to meet expected results.
‘Service sector’ can refer to the service industry as a whole or to subsectors of the service industry. The term can be used in a technical sense – usually in the context of trade negotiations and referring to the Services Sectoral Classification List, a comprehensive list of service areas covered under the General Agreement on Trade in Services. It can also be used in a more informal fashion to denote a group of service providers related to an industry, for example the health and wellness sector or the cultural industries.

Many studies and reports have recently been conducted on the region’s services sectors, identifying sub-sectors of most potential. While the emphasis varies from country to country, for example the carnival sector or services related to the energy sector in Trinidad or the film industry in the Dominican Republic, there are a couple of sectors that have been identified as priorities by nearly every member state. These are the cultural industries and the tourism sector.

In this edition of Services Scoop we’ve offered insights on these two sectors and explore suggestions on how to develop these sectors further.
Win or Die!

The Paradigm Shift in Travel & Tourism

There is a paradigm shift taking place in travel and tourism. The travel and tourism industry has been undergoing rapid and radical transformations driven largely by the all-powerful consumer. The paradigm shift reflects the movement away from the old, mass-standardised and rigidly-packaged forms of tourism, to a more individual, flexible, customised, and caring form of tourism.

The Paradigm Shift Creates more opportunities, but considerably more uncertainties. The rules of the game are changing and they are changing for everyone. Some players are winning—others are dying.

Today, winning does not just mean surviving, it means leading; it means becoming a champion of a new and profoundly changed travel and tourism industry. Competitive strategies are more important than ever. To stay ahead of the game, industry players and tourism destinations need to understand the new rules of competitive success— for to lead is to win.
LET’S CONSIDER

The best way to understand this shift is to compare ‘mass’ tourism with ‘Fordist’ mass production in the automobile industry. There is a striking resemblance between mass tourism and the mass production of cars. Mimicking the mass production of cars, travel and tourism was developed along assembly-line principles:

- Holidays were standardised and inflexible;
- Identical holidays were mass-produced, packaged and consumed; and economies of scale were the driving force of production and profits. This was all done with a healthy disregard for the environment as well as the norms, traditions and cultures of host countries visited.

Any customer can have a car painted any colour that he wants so long as it is black.

HENRY FORD

Now consumers are the ones calling the shots. They determine their ideal holiday and demand customised and sophisticated vacation options that meet their needs on their terms.

The most important force of change in this new paradigm is the experienced and demanding traveler. Inexperienced and sun-lust travellers of the past accepted mass tourism products and services. They bought the same packages, went to the same destinations, took the same tours, bought the same souvenirs and even took the same photographs! The informed, experienced, individual ‘new tourists’ on the other hand, are now driving a new type of travel. The ‘new tourists’ are demanding. They are a hybrid (they eat at fine restaurants and shop at discount outlets). They are difficult to predict. And they are spontaneous. These new consumers are in the driver’s seat. Travel suppliers are realising that they need to respond to their demanding clients with surgical precision – by listening attentively to their customers and by

Mass Production
- Mass Production
- Set Products
- Fixed Price
- Economies of Scale
- Suppliers in Control
- Consumers are price takers

Fordist Mass Production Pioneer

Thomas Cook
Father of Modern Mass Tourism

Mass Production
- Mass Production
- Set Products
- Fixed Price
- Economies of Scale
- Suppliers in Control
- Consumers are price takers

Mass Tourism
- Rigidly Packaged Holidays, Hotels and Travellers
- Inflexible Price Options
- Economies of Scale
- Suppliers in Control
- Consumers are price takers

Mass Tourism

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Tourism is here to stay. Despite the many changes and challenges thrown at the industry, travel and tourism continues to be resilient.

providing them with EXACTLY what they want. Successful suppliers are no longer production-oriented, but customer-oriented; they produce what their customers want and not just sell what they produce.

Technology is another important driving force that is changing the face of travel and tourism. It is technology that makes it possible to offer customised services on a large scale at cost-competitive prices. The internet in particular (with over 2 billion internet users worldwide), has impacted significantly on how we travel: how we look, book and process transactions and how we market and distribute travel and tourism services. Technology is profoundly shaping and forming the ‘new tourism’ paradigm.

Changing management and improved production practices are also leading a new global ‘best practice’ of flexible production in the travel and tourism industry. Locals are now demanding more responsible tourism. Destinations are more caring of their environment and cultures.

Socio-economic conditions that frame the industry’s growth – globalisation, rise of emerging markets, terrorism, war, political transformations (e.g. the Arab Spring) are also shaping the industry and driving the new paradigm.

These shifts have changed tourism as we know it. What was once an industry that dictated to the consumer has given way to one where the consumer wields the power to make or break your destination. Just look at how the customer-centric Trip Advisor is driving (or killing) sales.

So how should service providers in the wider tourism sector react to the new paradigm? It’s easier than you think! Just follow these three simple steps to success:

- Understand that whether we like it or not, there is a paradigm shift taking place in travel and tourism;
- Accept that this shift, in and of itself, is neutral in nature, as it brings with it both opportunities and challenges;
- Adopt our new alphabet (from A – Z) of competitive strategies for the industry, available in The Paradigm Shift in Travel and Tourism – New Rules for Competitive Success, some of which include:
  * Develop Authentic Experiences
  * You’ve Got to be Branded
  * Content is Key
  * Diagonally Integrate
  * E-Marketing is Essential…(and the list goes on)

Tourism is here to stay. Despite the many changes and challenges thrown at the industry, travel and tourism continues to be resilient. The sector will continue to grow and demand for travel and tourism is expected to regain its strength. In other words, while computers have replaced typewriters and e-mail has overtaken the post, there are, as yet, no real substitutes for the travel and tourism experience.

International tourism will continue to grow and is estimated to reach 1.6 billion international arrivals by the year 2020, according to the United Nations World Tourism Organization (UNWTO).

That the industry will continue to grow is not in question. However, it is increasingly evident that:

- The rate of growth will slow for old markets, products and destinations;
- Growth opportunities abound in new markets and for novel concepts and innovative ideas;
- The distribution of growth will shift; and
- The direction of growth will change.

The predicted growth and affecting change of the sector makes it critical for tourism providers to inform themselves and react accordingly. The Paradigm Shift in Travel and Tourism – New Rules for Competitive Success report is almost 30 years in the making and is based on systematic research and analysis carried out on travel and tourism trends over the past 3 decades.

The report shows how industry players need to INNOVATE to reinvent themselves, ENGAGE new technologies, LISTEN to their customers, CARE about their environment, TRAIN their teams, and ADOPT new best practices of customisation, diagonal integration, flexibility and market segmentation. Simply put, this report teaches how to respond to the new travel dispensation because those who have adapted are winning, while those who fail to act are dying!

The golden age of tourism is over: the age of unlimited growth and the exploitation of the environment as though it were nobody’s business, is rapidly drawing to a close. The world economy has seen unprecedented ‘recession’ and the end is not yet in sight.

Within this paradigm shift, there will be winners and there will be losers. What is for sure is that this will not be ‘business as usual’. Companies, destinations, product and service providers will need to reinvent themselves to stay competitive and win!
SPORTS TOURISM: ON YOUR MARKS. GET SET. GO!

SLOW OUT THE BLOCKS, THE CARIBBEAN’S FOCUS ON SPORTS TOURISM SEEMS TO BE PICKING UP SOME SPEED.

By Michelle Hustler
CONSULTANT FOR SERVICE DEVELOPMENT, GIZ
IN FACT, AT THIS VERY MOMENT, as I type out this article about the challenges and opportunities for sports tourism in the region, the 2012 and 2013 NBA Champions, the fiery Miami Heat, are at a training camp in The Bahamas! This is the first time that the team has ever gone internationally for a training camp and they have chosen our shores for this venture. The Miami Herald, NBC News and Sports Illustrated are amongst the many media outlets that carried this story – big news in tourism for our region.

My concern is that despite the rare and fabulous example above, it seems that the region’s strategy vis-à-vis sports tourism thus far is tantamount to running in many races, rather than working towards the title of world’s greatest. It’s inconsistent, erratic and incomplete and while it may result in a few very short term successes, it will not position the region as a destination synonymous with sports tourism.

Sports tourism is one of the fastest growing sectors of the global travel industry. Its contribution is pegged at 10 to 14 per cent of all travel and tourism receipts – or US $600 billion annually. So, it’s a sector with huge potential and a sensible and feasible opportunity for the region to expand on its ‘sun, sand, and sea’ offering – necessary in this new tourism paradigm.

Sports tourism is defined as “travel which involves either observing or participating in a sporting event” and includes classifications such as ‘sport event tourism,’ ‘celebrity and nostalgia tourism’ and ‘active sports tourism’. It’s curious therefore, that the Caribbean Tourism Organization has defined sports tourism as “international trips specifically taken to watch sporting events,” and indeed, this seems to be the emphasis across the region.

For example, despite the fact that Barbados is working with the Commonwealth Secretariat on a national sports strategy, ‘Visit Barbados’, the website of the Barbados Tourism Authority, page on sports in Barbados highlights exclusively sporting events on the island (an incomplete listing at that). “There’s always a sporting event to enjoy on the island any time of year” is the emphasis the organisation leaves potential tourists with.

Saint Lucia, at the launch of their 2013 sports initiative, similarly placed emphasis on sporting events, including the launch of TriSt. Lucia 2013, the island’s inaugural triathlon event and the hosting of the Youth Commonwealth Games in 2017.

Despite our focus on sporting events, are we really doing what it takes to attract sport event tourists? Sporting events are generally planned by sporting organisations for sporting purposes and usually with the support of volunteers, who typically do not have well developed business or marketing skills. Therefore, maximising the tourism potential is not given priority by the organiser.

What impact does our marketing of these events truly have? Are we encouraging new participants? Are we
thoughtfully persuading the families and friends of participants to attend events by offering competitive, enticing packages? Are we attracting fans of these events, by again offering appealing packages, including ‘meet the athletes’ activities? Or is our marketing of these events simply geared towards tourists who have already booked their holiday and are now looking at filling up their itinerary with interesting things to do?

The 2007 ICC Cricket World Cup, the region’s biggest sporting event to date, may have boosted infrastructure and, for a brief moment, regional cooperation, but the event did not reap the tourism results expected. Worse yet, the infrastructure built now sits underutilised and all cooperation gains made, like the CARICOM visa procedures, were quickly abandoned.

Are we maximising on the ‘sport event’ aspect of sports tourism?

In my research for this article, news pieces across the region highlighted our many ‘advantages’: new tracks, Olympic size pools, gymnasiums, stadiums, Usain Bolt, Grantley Adams – these nouns were tossed out into the tourism stratosphere like rice at a wedding. But what makes these offerings any different to what is available most anywhere in the world, replacing famous athletes as necessary? What would be the factor(s) that would result in a country in the Caribbean being chosen as a sports tourism destination over Europe, Canada or the United States, for example?

I’ll elaborate further. In a clip of John Lynch, Director of Tourism at the Jamaica Tourist Board, discussing Jamaica’s award for Caribbean Sports Tourism Destination for 2012, the first sentences out his mouth were, “We had a great year. We had Usain Bolt.” It’s terrific that Jamaican athletes are helping to raise positive awareness about the island but how is Jamaica translating this celebrity power into a tangible tourism offering? How many people, for example, have travelled to the United States because of the Olympic swimming great, Michael Phelps? Yes, he helps raise the profile of the U.S., as our Caribbean athletes do for our region, but unless our athletes are tied to sports tourism offerings, tourists are not going to visit the island simply because of our athletes. There are too many other determining factors at play.

A quick anecdote: I met a consulting colleague of mine from England for the first time in Trinidad. He had on a West Indies cricket team tie when we shook hands for the first time. John was enamoured with cricket and the West Indies, in particular. In fact, he took a taxi from the hotel to the Queen’s Park Oval to walk around. When John came to Barbados on business, he expressed a fond wish to see the Kensington Oval. I happily complied. After some fuss and a wait at the front gates, the staff allowed us to be accompanied into the grounds and deposited us with a grunt on the first landing. John looked down at the field with love in his eyes, but I was perturbed by the brusque, half-hearted treatment in the face of John’s infatuation. He pillaged the gift shop they had left us next to, really wanting to buy something (anything) but the offerings were so scarce, he left empty-handed.

Are we maximising on the ‘celebrity and nostalgia’ aspect of sports tourism?
I did a check on Trip Advisor regarding the Kensington Oval tour. At a glance, the reviews are great, but if you dig, all of the positive reviews were from those that had watched a game at the Oval. The few that had not had the opportunity to see a game and had simply wished to take the tour reported a lack of enthusiasm from the tour staff and difficulty in securing West Indies shirts.

Are we maximising on the ‘celebrity and nostalgia’ aspect of sports tourism?

Barbados tourism minister, Senator Irene Sandiford-Garner highlighted only two months ago, at the Pan American Sport Organization’s dinner celebrations, that there were 60 sports disciplines being practiced on the island. For my readers in the Caribbean, think about your home country for a moment – if a tourist wanted to practice judo, cycling, football or track and field, for example, would they be able to easily and readily make such arrangements? I would venture to say, “No.” If we are not making these disciplines accessible to tourists, then they are irrelevant selling points in our sports tourism offering. If we are not making sporting facilities easily accessible to tourists, then they are irrelevant selling points in our sports tourism offering. “If you build it, they will come,” is only an effective strategy sports marketing strategy in the movies. Our disciplines and facilities must be packaged and marketed.

For those sports tourism operators active in Barbados and the rest of the region, few are energetically targeting their market before they reach our shores. Typically, marketing tends to encompass (in the better scenarios) a website and local advertising. Fewer still are offering potential guests holistic sports tourism packages pairing a sport offering with accommodation, transportation, meals and visits to other local attractions. In article after article about the potential of this sector, we discuss the possibility of foreign sports teams training in our region, yet I’m challenged to find a sports tourism offering that professes to offer this service – managing the tremendous logistics involved in hosting a team. This service, not the fact that we have gymnasiums or tracks, will be the determining factor of a team or family choosing one destination over another.

Are we maximising on the ‘active sports tourist’ aspect of sports tourism?

The answer to my questions is of course, “no”.

Our region hosts many international sporting events, it has much good quality sport infrastructure available, including some world class examples, there’s a wealth of water-related activities and opportunities, there’s perpetual nice weather and exemplary athletes. It seems that elements of a successful tourism strategy lie before the region, like puzzle pieces on my Aunt’s dining room table - but they’re not being put together.

Don’t despair! The Caribbean does indeed have a lot of potential in this sector. Now, let’s stop this ongoing discussion on potential and focus on how to get the pieces together.

So maybe we’re slow out the blocks. Do you know who else is slow out the blocks? Usain Bolt. Need anyone ask how a race against him finishes?

References:
1. http://www.onecaribbean.org/content/files/Sportstourism.pdf
Sports Tourism: IS THE TIME RIGHT FOR THE CARIBBEAN?

By David M Gomez
CARIBBEAN EXPORT DEVELOPMENT AGENCY

Following on the commanding performances of Jamaica’s sprinters in international track and field events, and Grenada’s prodigy in the 400 meter, the Caribbean has fast become known for the calibre of its sprinters in the short distances.

Over the decades, track and field athletes from a number of Caribbean countries including the Bahamas, Barbados, Cuba, the Dominican Republic, Grenada, Jamaica, and Trinidad have excelled at an international level, despite the lack of world class training facilities and the continued low levels of investment in sports and athletics infrastructure within the region. The Caribbean was also known for its fast bowlers in cricket and the West Indies dominated the international game long before the recent investments in modern cricket pitches and stadiums. In addition, three Caribbean countries have to date reached the finals of FIFA’s world cup (Haiti, Jamaica, and Trinidad & Tobago). In spite of these and other successes in sports however, the region has never been known for being a centre for sporting excellence or for sports tourism for that matter, even as it has emerged regionally as a major tourism destination.

A few developments within the past couple of decades however suggest that the time may now be right for the Caribbean region to give serious consideration to comprehensive development of a sports tourism subsector.

For one, its athletes, at least its sprinters at the 100, 200, and 400 meter distances are increasingly dominant in international track and field events and meets. At one time this may have been attributable to those athletes receiving training abroad but over
the years a number of athletes have opted to remain home to conduct their training. Jamaica’s sprinters, for instance, for the most part, now train in Jamaica, and Cuba’s athletes similarly have a long history of training at home (although this may have been with the support of the former USSR). Given Jamaica’s continued success and even dominance in the sprint events of track and field, it would seem that the country has developed the technical and coaching expertise that now make it possible for other international athletes to seriously consider training in Jamaica.

Two, a number of Caribbean countries have become adept at hosting international sporting events or at least international events which involve sporting activities. Belize has for over a decade successfully hosted the Ruta Maya Race, a down-river canoe race which re-traces the ancient trading routes of Belize’s Maya and which has seen the participation of over 100 different countries to date. The country also has an annual cycling race which has long drawn international participants including a few years ago the USA’s national junior cycling team. Barbados – as did Trinidad, Saint Lucia, and others – recently hosted the T20 Cricket tournament and from the looks of it, this met with a large degree of success. The country is also host to a number of different international sporting events including auto-racing and surfing, amongst others and it has athletes who have placed well in track and field, sailing, and even surfing. Other countries, e.g. Guadeloupe and Tobago, have successfully hosted international cycling meets that attract the world’s top professionals; and a number of other countries within the region have at one time or the other also hosted successful athletic or sporting meets or events in a range of disciplines including basketball, volleyball, sailing, triathlon, bodybuilding, etc. thereby illustrating that they have the capacity to do so.

And three, the region’s institutions of higher education have all matured somewhat and are now better positioned to support development of a sports tourism sector through offerings of sports management and coaching development programs, etc., or alternatively to partner with the region for sports tourism. The University of the West Indies for instance has campuses in Barbados, Jamaica, and Trinidad – three of the countries within the region that have had athletes who have successfully competed at the international level – while a number of other countries have in recent times either established institutions of higher education or have seen their tertiary level institutions grow and mature. These institutions all offer advanced level business courses and other programs in tourism management, general management, psychology, etc. using educators and professors of Caribbean nationalities so it is evident that they expertise for higher education offering is resident within the region.

When the above is considered against a backdrop of a regional tourism sector, which has itself achieved some level of maturity, but for which recent reports from the region’s tourism authorities suggest that the performance of the sector in 2013 has been flat, then perhaps the time is right for the region to consider sports tourism, amongst other tourism subsectors such as health and wellness, medical, and education tourism, as means and ways for diversifying the region’s tourism product offering.

There are a number of challenges which will need to be overcome however if this is to be the case, not least of which are the persistent low levels of public and private investments into sports infrastructure and into sporting development programmes at the national level; a continued lack of effective policies and other enabling frameworks for sports to develop properly; a historical disposition whereby sports is viewed and treated more as a social need rather than as a sector which has development and trade potential; weak national and regional institutional structures in sports; and a regional private sector that is currently struggling, more so in the recent tough economic times. To make matters worse the region doesn’t necessarily have a culture of supporting sports development other than as measures of businesses’ social responsibilities (Jamaica may be the exception here) and consequently private sector support has not manifested in a way that has really served to support development of sports. The region’s private sector however does have some history of successful services exports, such as the region’s performance with tourism and financial services, amongst others, which would seem to suggest that it is possible that much can be learned from the successes therein and perhaps extrapolated to sports tourism.

The question though is one of whether the Caribbean is now ready for sports tourism and to have this sector serve as a new driver of economic development across the region – the prospects for this certainly warrant further examination.

*This article does not necessarily represent the views of the Caribbean Export Development Agency*
Volun-tourism is a recently coined term combining travel and volunteering for a charitable cause. More and more, people are leaving the sun, sand and sea vacations behind in search of a more meaningful travel experience.

**LEARN A NEW LANGUAGE**, discover a new culture, gain valuable skills and enhance your resume – these are just a few of the many reasons to volunteer in another country I found listed on endless organisations’ recruiting pages.

I started to wonder, who is really helping whom? When a girl from Toronto, for example, leaves the luxuries and convenience of city life to live in a rural community abroad, it is without a doubt going to be an eye-opening, life changing experience. I know this for sure, because I’m that girl.

In 2010, I taught English in a rural orphanage in Kenya. As much as I was a teacher, those 35 children provided me with important life lessons. They changed my life making me more grateful and understanding of the world. On the other hand, all the turmoil and hardships these children face did not change after I left. I wondered, did I really help?

Currently, I’m doing an internship working on a pro-bono basis in Barbados; I came here to work with HelpDesk Caribbean, a one-woman consulting company, in her efforts to support Caribbean Network of Service Coalitions. While it’s an unpaid internship, I must say I’m getting a tremendous amount of value. I’m learning what it is like in the business world and picking up some valuable skills to enrich my career, including writing articles about the sometimes-confusing world of trade in services.

When I’m not working on my internship, I’m volunteering at the local animal shelter here in Barbados, The Ark. I’m meeting people from all over the world simply based on our love for animals. The wagging tails and happy faces of those residing in the shelter remind me that I am making a difference, and I realise that I did in Kenya, also even if only briefly. In turn, I’m rewarded with gratitude, understanding of another culture and new friendships and experiences. A valuable exchange!

So what are the other benefits of volun-tourism?
**FOR THE HOST COUNTRY**

**Exchange of Knowledge and Skills**
Most volunteer organisations support a variety of projects attracting professionals of all kinds: doctors in medical camps, teachers in orphanages or students in conservation projects. The volunteers want to share their knowledge and skills and the host country can learn from them.

**Economic Support**
In addition to the work volunteers undertake, there are more direct economic benefits via spending on hotels, tours, restaurants and shops.

**Marketing Support**
Volun-tourism tends to be a positive experience, which is often shared via the volunteer organisations and by the volunteers themselves, raising awareness of the country as a tourism destination and encouraging others to volunteer abroad.

**Inspiring Others**
Helping those in need is inspiring. Although volunteering might kick-off with supporting a specific organisation over a specific timeframe, often volunteers return from the trip with a desire to continue. When asked how she went above and beyond her volunteer position, my friend Laura said "I have returned each year since and raised money to spend on various projects including a medical camp. I took my experience home and raised money, resulting 4 years later in a registered charity."

**Networking Opportunities**
Developing a country's network, can lead to future opportunities. I often share my stories at the orphanage with others and have encouraged a few friends to visit the same place I worked, fostering new connections and possibilities.

**FOR THE VOLUNTEER**

**New Cultural Values**
Volunteers are fully immersed in a new culture and embrace all the challenges and opportunities that come with it. Learning a new a new language and different customs creates a better understanding and respect of others.

**Altruism**
“For it is in giving that we receive.”
–St. Francis of Assisi

Doing good just feels good - especially abroad. Giving up the simple luxuries of home for an easier way of life will instill a sense of gratitude. Upon returning home, I was much more aware and thought twice about water, food and electricity usage. I always ensure I am only using what I need.

**Building Networks**
The value of human connections, either professional or personal, around the world is truly priceless.

I believe that when volunteers come to a country with the goal to improve something, aid with a skill or assist with the development of a small community that the positive effects will ripple. The connections are unforgettable providing experiences that bring us all a little bit closer and more understanding of each other’s differences. These benefits among others are intangible and carry endless value. Do you believe your business could benefit from an outside perspective? Perhaps you want to expand overseas but feel limited by finances or resources. That's why I wanted to write this article. In my visits to varied countries and cultures, one thing remains constant: there are endless volunteers and interns abroad eager to travel to you and give each other that international edge.

The five months I’ve spent here in Barbados have provided me with skills and new found confidence...
The CARICOM region, although tiny in terms of population, is well-known for its creativity and cultural diversity. Such cultural diversity manifests itself in a variety of forms, the best example being music - reggae, dancehall, calypso, soca and chutney. The range of artistic expression includes folklore, crafts, fashion, music, cuisine and carnivals, among others. Through this natural creative and cultural variety, the Caribbean is distinguished as a highly interesting and complex location. In trading terms, Caribbean cultural products and services are increasingly becoming marketable items for export on the international scene. The creative industries in the region are a significant sector with substantial economic value.
Around the world, the cultural or creative industries are increasingly being perceived as an economic sector in their own right and are highly prioritised in national agendas.

- At the start of the last century the Trinidadian musical group, Lovey’s String Band, toured New York. In 1912, at least five years before the first Jazz recordings were made, Lovey’s strings were recorded, establishing an important benchmark and precedent in the history of the region’s creative economy.

- In the pre-World War II period, two calypsonians performed live on the US cable network. In 1934, the Roaring Lion and Atilla the Hun performed on the National Broadcast Corporation (NBC) during the prime time period. Around the same period, they also recorded 16 songs for an album released by RCA.

- Harry Belafonte’s album entitled “Calypso”, that featured many calypsos from Trinidad, was the first LP to sell one million copies in the United States in 1956.1

- More recently, the iconic Jamaican, Bob Marley, came to the fore of the international recording industry in a previously unknown genre, reggae.

- Marley is still one of the best selling dead artists in the world.

- Trinidad’s Peter Minshall designed the opening ceremonies for the Barcelona and Los Angeles Olympics.

- In the last decade, Rihanna, a working-class girl from a district outside Bridgetown, Barbados, became an international music superstar.

- Trinidad and Tobago is famous for its Carnival. Trinidad-style carnivals have been “exported” to Canada, the United States and England.2

- Undoubtedly, the Caribbean scores highly in terms of talent in the entertainment industry. It is therefore not surprising that CARICOM states and the Dominican Republic made the culture/entertainment sector a major issue in the negotiations towards an Economic Partnership Agreement (EPA) with the European Union (EU).

- Many cultural industry professionals will argue, however, that the sector has achieved some measure of export success in spite of governments, not because of them. (For instance, most governments still maintain prohibitively high import duties on products that are inputs to creative activities).

- To date, all CARICOM states have failed to put in place strategies and concrete actions to take advantage of the market access granted by European countries and other facilities in the EPA. The region has been tardy at capitalising on the emerging international economic opportunities offered by the EU, international institutions and others that would help the region expand the creative economy. Furthermore, no one has systematically researched and developed market niches, outside national and diaspora markets. As the region confronts rapid changes in technologies and business model transformations, it is additionally plagued by internal bottlenecks. It consequently remains behind the curve in strategic action and policy making.

- Around the world, the cultural or creative industries are increasingly being perceived as an economic sector in their own right and are highly prioritised in national agendas. In the UK, a “Minister for Creative Industries” was appointed in 2005. France set up comprehensive special framework programmes. In 2006, the European Commission published a 300-page study on the economic importance of the cultural...
sector. Public players from Brazil, China, India and Australia have organised national and international expert conferences and founded new research institutions specialising in creative industries. More recently, organisations such as the ITC, OECD, World Bank, WIPO, ILO, UNESCO and UNCTAD have increasingly addressed the topic. When the European Ministers for Culture and the Media met in Berlin in February 2007, a great number of European states pressed for more emphasis on cultural/creative industries. So, just how should the Caribbean approach creative entrepreneurial development and maximise on the sector’s economic value, which remains largely un-documented and untapped? Highly recommended is a multi-pronged technical assistance strategy that projects our artists globally.

The following recommendations are aimed at assisting the region to take concrete steps towards driving this economic sector.  

1. **Establish and implement a concerted research and marketing programme** targeted at specific national and other musical and performing arts festivals across Europe. This would include professional associations such as the European Festivals Association (www.efl-aeff.eu/en/festivals/). Funding can be made available for artistic exchanges with European countries under the EPA Protocol on Cultural cooperation.

2. **Establish national endowment funds for the Arts to which the public and private sectors can contribute.** There may also be need for a regional fund for CARICOM-wide collaborations and productions.

3. **Establish a Caribbean Entertainment Investment Fund of about US$20-25 million** at concessional or subsidised rates of interest from which the private sector in CARICOM can access financing for commercially viable projects. This could also include public-private partnerships to build facilities and infrastructure for the creative sector and joint ventures across CARICOM states and between foreign and regional companies. An example of this is the $200 million Nigerian Creative and Entertainment Industry Fund.

4. **Build new facilities and infrastructure for artistic performances and practice across the Caribbean Community.** To date, only Trinidad and Tobago has a major, specialised facility for the performing arts. In the OECS there are no public facilities that are up to professional standards.

5. **Convert and upgrade the irregular Caribbean Festival of the Arts (CARIFESTA) into a full-fledged professional entertainment trade show in the Caribbean.** There is great need for a forum for showcasing Caribbean talent to key players from Europe, North America and Asia that purchase, promote and distribute cultural products and services.

6. **Establish national databases of artists and cultural entrepreneurs in all CARICOM countries which are updated on a continuous basis.** The closest example of an inventory is the Film Company of Trinidad and Tobago which has an impressive 2009 Production Directory consisting of 335 pages.
7. Collect market information and market opportunities, exchanges, funding for entertainers and other Caribbean artists’ involvement in trade missions, exhibitions etc. in the European Union, North America and Japan on a regular basis.

8. National and/or regional entities need to help creative firms develop new short and medium-term strategies for creation, distribution and exploitation using digital technology and increasing international integration.

9. Provide training for financial institutions in the Caribbean on how to value intellectual assets (particularly copyright in music). Training in risk assessment for investment projects in the entertainment sector is also required especially since banks have no experience, apparent interest or understanding in lending to creative sector companies or individuals.

10. Establish and strengthen training institutions for the entertainment sector, in particular, music and performing arts in countries in which they do not currently exist. A sub-regional facility or training scholarships should be provided for creative persons to study in CARICOM or abroad.

11. Establish creative business incubators (i.e. low-cost shared facilities for creative businesses which are linked to arts schools or universities’ arts departments and advised by seasoned local and foreign industry professionals). This can be linked to the establishment of creative clusters composed of research centres and artistic schools.

12. Set up a regional initiative to promote the use of design and/or art in business to develop competitive edges, for example through “artists in residence” projects. In conclusion, the removal of the old type models of culture as mainly means of promoting national identity will depend on identification of and investment in new sources of smart, sustainable and inclusive growth to stimulate the sector. Building on their rich and diverse culture, knowledge and creative talent, Caribbean people must not only pioneer new ways of creating value-added, but also of working together and sharing resources across the region.

The provisions for the creative sector established in the CARIFORUM–EU Economic Partnership Agreement need practical realisation. For decisive progress beyond national and regional markets, much will depend on the rapid and efficient conversion of new ideas into systematic and meaningful implementation. This essentially requires less talk and more action to fulfil the growing expectation that the region’s creative industries will be eventually recognised as dependable, internationally viable and predictable market sources.

1 Suzanne Burke, Promoting Creative Industries: The Trinidad and Tobago Experience. UNDP. August 2010, p. 9.
Cultural Industries

A VIABLE SECTOR FOR TRINIDAD AND TOBAGO

Joy Francis
CONSULTANT

THE CULTURAL INDUSTRIES (also known as the creative industries) includes music, television and film production, publishing, visual arts, handicraft, fashion, cuisine, dance, theatre and cultural tourism. In Trinidad and Tobago the sector would also include Carnival. According to the United Nations Educational, Scientific and Cultural Organization (UNESCO), cultural industries combine the creation, production, and distribution of goods and services that are cultural in nature.¹

The economic contribution of the cultural Industries to developed and developing economies is immense. In fact, the United Nations Conference on Trade and Development (UNCTAD) revealed that, in 2005, the cultural industries accounted for 7%, or $1.3 trillion of the world economy.

In 2010, the total contribution of Trinidad and Tobago’s Carnival alone to the domestic economy was estimated at TT$1.3 billion. This impressive figure demonstrates that the creative industries has the potential to be a truly important sector in Trinidad and Tobago – and Carnival is only the tip of the iceberg when it comes to country’s cultural offerings. Talent, the ‘raw material’ of the cultural industries, is abundant in this most southern twin-island of the Caribbean Region.

Investing in the cultural industries offers additional benefits beyond revenue generation:

- The cultural industries offers an alternative, for an economy that is highly dependent on the oil and gas sector;
In 2010, the total contribution of Trinidad and Tobago’s carnival alone to the domestic economy was estimated at TT$1.3 billion.

- The sector is diverse and includes film, music, cuisine, fashion, handicrafts, as well as Carnival, as priority sub-sectors;
- The sector has developed worldwide respected niches, particularly as it relates to Carnival, soca and steel pan, creating an opportunity to develop foreign exchange. The 2004 Strategic Plan for Pan indicates that the steel pan music sub-sector generates over TT$250 million in foreign earnings annually;
- The sector has a large spill-over effect positively impacting many other sectors such as food and beverage, tourism, media, transportation and retail;
- There are many sources of revenue streams to tap into. Consider Carnival’s franchise contracts to divest sections of big mas bands to private individuals or groups that independently produce, package, market and sell the section’s experience. This strategy has become a rather lucrative source of income for the big bands. There is also sponsorship, costume sales, ‘fetes’ and food and drinks.
- The creative industries is a substantial generator of employment. Again, consider carnival and the wide range of skills and large number of people required to make it happen: artisans, wire-benders, designers, seamstresses, event planners, decorators, venue operators, marshals, judges, security professionals, musicians, djs, models, beauticians – to name but a few.
- There is growing national and international support for the sector. The Trinidad and Tobago Coalition of Services Industries has recently secured support from international donors for projects in the Carnival and fashion industries. As the United Nations Development Agencies have rightly purported, “creativity is widely recognised as a source of wealth, a means of generating employment and a significant factor in poverty reduction.”

  Trinidad and Tobago – let’s face the music!

1 http://en.wikipedia.org/wiki/Cultural_industry
Spa and Wellness

AN OPPORTUNITY FOR EXPORT, DIVERSIFICATION AND ECONOMIC GROWTH

By Amilin Mendez
CARIBBEAN EXPORT DEVELOPMENT AGENCY

The spa and wellness sector has the potential to change the face of the Caribbean’s tourism industry while simultaneously serving as a driver of job creation and fuelling export earnings.

According to a recent Commonwealth study wherein the global health and wellness industry was projected to be a US$40 billion international market, which grows at 30% per annum, the Caribbean’s share of export earnings was estimated at around US $175 million (and that was five years ago!). For a region whose tourism performance is facing challenges in growth, where the product offering had lost its lustre and where countries have been struggling to diversify their economies, the spa and wellness sector presents a viable opportunity for returning tourism to its former status as a robust driver of economic development. CARIFORUM states all possess varying natural endowments: beaches, tropical rain forests, waterfalls, and sulphur springs, to name a few, as well as a wide-range of traditional cultural practices. These factors, coupled with the identification of the region as the world’s natural spa, makes for an economic sector that is ready for export enhancement and for capitalising on the region’s tourism product offering.

Recognising the latent economic potential of the sector, Caribbean Export with financing from DfID under the CARTFund Program administered by the Caribbean Development Bank has been working over the past few years to craft a strategic way forward for the health and wellness (spa) (H&W) sector.
## Overview of the Sector

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<tr>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
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<tr>
<td><em>The Caribbean is a well-established tourist destination;</em></td>
<td><em>Unregulated sector, with no existing quality standards for facilities or services;</em></td>
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<td><em>Excellent climate, natural endowments for the development of a H&amp;W sector;</em></td>
<td><em>Variations in quality of facilities and services across CARIFORUM;</em></td>
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<td><em>Rich and varied cultural heritage, which is an ideal fit for H&amp;W tourism;</em></td>
<td><em>Lack of market intelligence. Poor understanding of the size and structure of the region’s health and wellness offering and no monitoring facilities to track the growth of the sector;</em></td>
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<td><em>Major infrastructure (sea ports, airports, telecommunication) is in place;</em></td>
<td><em>Tourism planners are aware of potential of the H&amp;W sector but some have yet to prioritise it as a sector ready for export development;</em></td>
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<td><em>Large resort infrastructure has been built up in many CARIFORUM countries;</em></td>
<td><em>Environmental degradation in the Caribbean;</em></td>
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<td><em>Over the past 5 years, the Caribbean has seen an increase to just over 20 world-class spas;</em></td>
<td><em>Low quality products and limited product development;</em></td>
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<td><em>Availability of medicinal and aromatic plants that have uses in the wellness and beauty sectors;</em></td>
<td><em>Sector in the region dominated by large, international hotel chains;</em></td>
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<tr>
<td><em>Market access is relatively easy with no major barriers to trade;</em></td>
<td><em>Limited government support;</em></td>
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<tr>
<td><em>CSME and EPA offer opportunities for investors in the H&amp;W sector;</em></td>
<td><em>Lack of advocacy groups (associations, interests groups) to support the development of this sector in the region;</em></td>
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<tr>
<td><em>The free movement of people and goods across the region will help unify the H&amp;W sector and support the development of regional standards.</em></td>
<td><em>Limited investment in this sector;</em></td>
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<tr>
<th><strong>Opportunities:</strong></th>
<th><strong>Threats:</strong></th>
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<tr>
<td><em>Global increase in spa and wellness travel;</em></td>
<td><em>Established H&amp;W practitioners have strong international presence presenting a challenge to new-comers in the sector;</em></td>
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<td><em>Growth in consumer health consciousness;</em></td>
<td><em>Increased competition from Latin America and other ‘new’ destinations pursuing H&amp;W tourism;</em></td>
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<tr>
<td><em>International market for spa products made from natural resources;</em></td>
<td><em>Lack of uniform quality standards and controls;</em></td>
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<tr>
<td><em>Increased funding from governments and donor agencies;</em></td>
<td><em>Insufficient trained personnel;</em></td>
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<td><em>Limited supply and high cost of local beauty care products and treatments (high profit margins);</em></td>
<td><em>Limited and unreliable transportation links within the Caribbean region;</em></td>
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<tr>
<td><em>Creation of new business and employment opportunities;</em></td>
<td><em>CARIFORUM countries prone to natural disasters;</em></td>
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<tr>
<td><em>Caribbean participation in international associations and interests groups;</em></td>
<td><em>Perceived security concerns related to violent crimes in the Caribbean.</em></td>
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<tr>
<td><em>Integration of state-of-the-art technologies and processes in the H&amp;W identity;</em></td>
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## CHARTING A WAY FORWARD

### Strategic Pillars

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<tr>
<th>PILLAR 1</th>
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<th>PILLAR 4</th>
<th>PILLAR 5</th>
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| • Policy Development & Legislation  
• Implementation of Accepted Standards  
• Advocacy  
• International Accreditation | • Organisation Development & Strengthening | • Articulation of Unique Selling Proposition  
• Development of Caribbean Brand  
• Brand Positioning  
• Target Markets and Market Access  
• Marketing Partnerships  
• Promotions & Campaigns | • Product and Services Improvement  
• Capacity Building | • Donor coordination  
• Public Private Sector Partnership |

...the identification of the region as the world’s natural spa, makes for an economic sector that is ready for export enhancement and for capitalising on the region’s tourism product offering...
To create the necessary ecosystem for the growth of this sector, it is vital to obtain the appropriate policy and development legislation at the national level which would be accompanied by international standards. Therefore, in August 2013 Caribbean Export put forward a regional sector strategy, as well as recommendations for regional quality assurance measures (i.e. standards) targeted at stakeholders across the region through a formal program in Barbados and a subsequent roll out in five other CARIFORUM countries, namely: Belize, Dominica, Dominican Republic, Jamaica, and Saint Lucia.

The effort focused on three main objectives:

- **a. Market Research & Strategy Development**
  aimed to give strategic direction for improving the capacity of the health and wellness sector in CARIFORUM countries, highlighting Caribbean characteristics and the potential of the sector in the fast growing global market.

- **b. Marketing & Promotion of the Region’s Health & Wellness Products**
  aimed to raise the Caribbean’s international profile and reputation in relation to this sector through the development of a website, exposure to best practices and participation in international trade shows.

- **c. Standards Development**
  aimed to improve quality of goods and services in the industry and consumer protection in keeping with international benchmarks.

Caribbean Export received positive feedback from stakeholders in the sector:

- The strategy and standards were endorsed by national policy makers and other stakeholders;
- National Committees were convened to drive the implementation of the strategy and to encourage the adoption of the standards by spa and wellness operators;
- The health and wellness sector was prioritised as one ready for export development and promotion;
- A deeper understanding of the unique developments in the sector was created. Within the upcoming months Caribbean Export will work closely with the regional business support organisations to ensure priority areas for each state can be realised.

Service providers and other stakeholders who are interested in the Caribbean Spa and Wellness Sector Strategy 2014-2018 and the Industry Standards for Spa and Wellness Entities in CARIFORUM Territories can access this information at: http://www.carib-export.com/projects/caribbean-spa-wellness/ or contact Mr. David Gomez, Manager of Trade and Export Development, at Caribbean Export Development Agency.
As a result of the meaningful work of the coalitions across the Caribbean and the growing collective knowledge and experiences, Caribbean coalitions are leading globally with respect to providing innovative and impactful assistance to service providers. Year by year, as the coalitions strengthen, the number of service providers whose international competitiveness has been enhanced as a result of a CSI programme is growing. While the process of converting a service provider into a service exporter is slow going, the results are real.

This section offers guidance to service exporters and would be exporters. For more information, visit your local CSI to pick up copies of the Strategies for Service Exporters Series. Speak to the CSI about the programmes they currently have in place and their plans for 2014. Get involved in their activities. Sign up for newsletters and participate in Facebook discussions. The relationship between CSIs and their members is mutually enhancing. The more you participate, the more you’ll get out of the partnership.
What can Government do to Support Services Exports?

Mark Hellyer
DIRECTOR, CTA ECONOMIC AND EXPORT ANALYSTS LTD.

Services exports are increasingly important to overall trade and economic growth in developing countries throughout the world, especially those of the Caribbean. The share of services exports in total exports (including goods and services) in the Caribbean averages 50 percent compared with 15 percent in Asia and Africa and only 12 percent in South America.

Services exports growth in developing countries has been rapid over the last five years with an average growth rate of 12.8 percent per annum, compared with the growth in the world services market of 8.3 percent per annum over the same period. However, the Caribbean only averaged growth of 3.3 percent per annum and risks lagging behind the world in services exports. Caribbean governments need to be more proactive in stimulating and promoting the services sector to raise the growth rate of their services exports through:

- Recognising the importance of services exports (especially non-tourism and financial services);
- Creating an enabling environment for services exports;
- Ensuring sectoral legislation supports the services sector;
Most important is the legal recognition of trade in services. Many laws are developed explicitly for trade in goods and exclude (or simply do not include) the export of services...

One of the main reasons for the lack of recognition of services is the poor statistics on specific services sectors. Governments need to develop systems to collect and analyse data on services exports. This will help to improve an understanding of the sector, highlight the specific areas of growth and identify the sectors that contribute most. This kind of national awareness raising will not only aid policy prioritisation within government but also encourage greater participation in services exporting, better support from business support organisations and strengthened services trade associations.

Government also needs to prioritise services exports within national export promotion efforts, specifically mandating appropriate government agencies to take the lead in promoting the export of services. Often, focus of such agencies is solely on export of goods. In the case of the Caribbean, the resources allocated to services export promotion is far less than the resources allocated to goods.

National services associations play an important role in lobbying and policy advocacy, establishing standards and qualifications, and advising government agencies on sectors or markets of export interest. However, services associations are generally weak and many are focused on national, rather than international market development. Part of the problem is that although services exports are significant, they are spread across a diverse range of sectors – some relatively small – which creates funding and capacity issues. Moreover, within each services sector, individual exporting firms tend to be fairly secretive in order to avoid competition.

There is need for some government funding for these bodies, at the very least for the public good they provide.

A country’s enabling environment can encourage (or discourage) trade in services. The legislative and regulatory regime directly affects the global competitiveness and ability to export. Most important is the legal recognition of trade in services. Many laws are developed explicitly for trade in goods and exclude (or simply do not include) the export of services, leading to unequal treatment in the export of goods and services. Treatment of services exports by national authorities is also uneven and inconsistent. Even where the law does not specifically exclude services exports, tax inspectors and other authorities, for example, often treat them as national sales.

Competition policies can also affect services exporters, in particular access to international telecommunications, where availability, reliability and cost can be determined by the level of competition in the national telecommunications market. Other legislation and regulations affecting growth in services exports include foreign direct investment policies and incentive regimes, equity participation and repatriation of funds. Governments must systematically review and mainstream services to assess how its legislation and regulations affects services export potential and instigate reforms to encourage growth.

Many sectoral policies, laws and regulations are solely targeted at national policy objectives and often without regard to the business aspects of services. For example, health and education policies can be focused exclusively on national development and not allow for export at all.
Restrictions on participation in a services sector nationally can prevent the growth of services exports. These include limits and quotas on licensing service providers which raises domestic costs and restricts interest in exporting, since those operators already have a high profit domestic market. Closely related to this are qualification requirements for practitioners that are often different to those required by export markets. Such restrictive accreditation requirements, whereby professional service providers may have to be accredited to national bodies that have no relevance to the target export markets and completely different standards and criteria, lead to dual accreditation.

The legislative environment for data protection, confidentiality and intellectual property within some sectors is crucial in attracting export sales. This is particularly important for business process outsourcing (BPO), software, financial services and medical sectors. Again, whilst protecting national interests, governments need to ensure that opportunities for services exports are facilitated across all sectors.

Negotiating market access is an important task for governments in order to remove a broad range of constraints faced by services exporters such as non-recognition of qualifications, restrictions on foreign participation in the market (including public procurement), licensing/quotas restricting number of operators, accreditation (costs and nationality), restrictions on visas and work permits, protection of intellectual property, and registration and certification. International negotiations are undertaken at the multinational level within the context of the World Trade Organization (WTO) General Agreement on Trade in Services (GATS), at the plurilateral level (such as the WTO General Procurement Agreement, in which market access to public works and services contracts is a large component), regionally, within economic groupings such as the CSME, and bilaterally, as part of free trade negotiations such as the EPAs. In addition, improved market access can be negotiated...
through mutual recognition agreements (MRAs) for qualifications. To be effective however, negotiators must understand the priority sectors for its country and what constraints they face. Unfortunately, most negotiations are undertaken in a vacuum and therefore reap less than optimal results.

High-end services exports rely predominantly on the available pool of labour and without this pool, exports of services are constrained. A World Bank study shows a correlation in developing countries between the level of tertiary education enrollment and the level of services exports. Therefore, government education policy should be aligned to the longer term vision of a services oriented export economy. In the short-term, governments can develop and fund training to provide an immediate labour force for specific services industries in areas of export interest. While such initiatives can help address short-term unemployment, training itself needs to be continuous to allow for movement up the value chain and prevent price pressures or a decline of the industry, if long-term benefits are to be realised.

Competitive delivery of services exports requires a fast, reliable and cost-effective ICT infrastructure. For real time delivery, such as call centres, access to at least two sub-marine fibre optic cables is usually expected. Within the country, ICT infrastructure is also required in locations where services exporters are located. Many governments invest in creating this infrastructure by building backbone networks and/or establishing 'tech' parks. Both these types of investments have been funded directly by government as well as through public-private partnerships and/or privately with government fiscal incentives. The more the internet is used in the wider population, the greater the scope for entrepreneurs to use it for business and the greater the potential for export of services. In addition, with the widespread use of the internet comes the diffusion of a set of skills that lends itself to services trade...

...with the widespread use of the internet comes the diffusion of a set of skills that lends itself to services trade...

governments need to both provide facilities (availability and cost) and encourage its use.

Having recognised the important role that services trade can play, many governments embark on designing a framework to guide the systematic development of the sector. However, many of these strategies are not correctly anchored. By their nature, services cut across different ministries, departments and agencies in government and various non-state actors, including business, academia and research institutions. With multiple stakeholders, there are issues of trust and conflicting interests that need to be managed. Such a complex system makes it more difficult to build consensus on a lead organisation to coordinate, monitor and report on services development.

Successful implementation of strategies to develop services is also a challenge if they are not properly aligned to a country’s development frameworks. Often, the strategy is aligned to countries’ broad development objectives but it needs to go further and identify a specific ‘pillar’ or ‘goal’. This fit is of critical importance because first, it makes it easier to identify and allocate the necessary funds, and second, it increases the chances for effective monitoring of activities and results. Another reason for the low level of strategy implementation arises out of challenges to do with co-ordination. Getting the key ministries, departments and agencies to work together is often a significant challenge especially in the social sectors (where business and public interests are perceived to be contradictory), but also in other areas such as works and constructions (where compliance with national standards is a requirement for services exporters, regardless of the market being targeted). In order to build relationships, it is essential that partner organisations understand their roles, the costs involved and the benefits that accrue with engagement. This is not always well articulated once a strategy has been designed, as there is often no forum to discuss such issues. Experience demonstrates that involving the right people from the start of the initiative – i.e., before the strategy is developed – is more likely to stimulate collaboration at the implementation stage.

The role and potential impact of government support to trade in services is clear. Experience of providing strategic advice to governments throughout the world has shown that despite the provision of information on the benefits, there appears to be little real commitment to changing policy priorities towards services exports. There is, therefore, an important role for national stakeholders (including services coalitions) to support governments in building capacity to design and implement frameworks to improve services trade.

Trade Fair Tips
FROM THE GIZ

Ginelle Greene
PRIVATE SECTOR OFFICER AND
JUNIOR MONITORING & EVALUATION
SPECIALIST, EPA IMPLEMENTATION
SUPPORT PROJECT, GIZ

BUSTLING CROWDS FIGHTING THEIR way into booths set up to woo them over, prospective customers being pursued by enthusiastic sellers, the scrutiny of international buyers looking for ‘the next big’ thing for their distributors and retailers, the roar of hundreds of different conversations, the smell and the sounds of goods and services being sampled – trade fairs represent a dynamic market place setting like no other.

A goal of the GIZ Economic Partnership Agreement (EPA) Implementation Support Project is to provide Caribbean companies with the “crucial services for seizing market access opportunities arising from the EPA.” To this end trade fairs have been utilised as a tool for providing such prospects. Over the past three years, the GIZ, in partnership with other regional organizations such as the Caribbean Export Development Agency, have had much experience in helping CARIFORUM companies to prepare for and participate at trade fairs around the world.

The GIZ has supported companies to attend events in various sectors such as:
As a result, the GIZ has had the benefit of working directly with trade industry experts on Caribbean participation at these events, as well as with the Caribbean exhibitors themselves. Based upon these experiences, GIZ has formulated some useful tips for future exhibitors who participate at international trade fairs, particularly in Europe, as well as for the business support organisations that assist these companies during the key stages of such initiatives.

BEFORE THE TRADE FAIR
The planning and preparation stages of a trade fair are the most important as this lays the foundation for how successful exhibitors will be once they arrive at the event. The participating companies should familiarise themselves with the event and market by conducting proper market research to determine which type of buyers will be in attendance, the types of buyers who will likely seek out their products and the typical expectations of these persons.

The exhibitor should then consider these findings with respect to the product that they wish to introduce into the market and make any necessary adjustments to ensure a positive reception upon presentation at the fair. Consider brochures, business cards, booth display and product labelling.

Such research should also take into consideration pricing expectations and the competition already present in the market. Based upon this, the exhibitor should determine if their product is cost competitive and if not, seek to find ways to justify the pricing of their product, e.g. better quality or it sells a story that is unique, such as authentically ‘Caribbean’.

THERE’S A DIFFERENCE BETWEEN INTEREST AND COMMITMENT

The next step, and the single most important factor in determining export readiness, is establishing the commitment to exporting. Successfully penetrating a new market requires a substantial investment in time and money, even when suitably prepared.

◊ Are foreign markets necessary for the growth of the company? Is there significant competition and little demand for your service offering in the national market? Is there a unique opportunity in a foreign market?
◊ Are management and staff prepared to devote the time required to develop an overseas market – at least a year period?
◊ Is management willing to divert time from existing business to focus on developing an export market?
◊ Is management prepared to commit the resources necessary in penetrating a new market? Is there an export development budget?
◊ Is management and marketing staff prepared to travel and spend significant time in the new market?
◊ Is ‘exporting’ recognised by the full staff as a priority of the organisation and is everyone prepared to work towards this goal?

If management is hesitant about committing to establishing new markets, then this is not the right time to begin planning for export. Be cognizant however, that in this ever-expanding global marketplace, your company will likely have to tackle the export issues sooner or later – you may get a request from a potential customer abroad, or perhaps a unique opportunity in a foreign market will emerge, or maybe increasing competition in the local market will make the status quo impossible.
What will you do?

Available at your local Coalition of Service Industries
In terms of the food industry, the Anuga trade fair is as big as it gets, providing a platform for thousands of companies to vie for the interest of the equally thousands of high value buyers present at the exhibition. For large trade fairs such as this, sufficient time for such planning is particularly critical and should start at least a year in advance. Potential exhibitors should seek assistance from their local business support organisations, which often contract an expert consultant familiar with the sector, market and event to assist.

DURING THE TRADE FAIR
A smile can go a long way. Trade show hours can be long and exhausting, however it is important to maintain a positive attitude at all times as buyers are continuously passing by and you never know who may be a potential client. Be pleasant to all visitors, regardless of whether they appear to be a buyer or not (you never know!).

Cooperation between exhibitors is important and can attract even more buyers, especially in a joint booth setting. Caribbean companies are classified as micro and small sized enterprises in the bigger EU and other international markets. As such, buyers are interested in what the overall Caribbean region has to offer them as a package rather than the offerings of individual firms. GIZ has found that the booths that have cooperated well together, showed the most success in terms of post-trade show deals and orders.

Cooperation with other booths at the trade fair can lead to business deals as well as joint venture opportunities and strategic alliances not previously planned for beforehand.

AFTER THE TRADE FAIR
Immediate follow-up with contacts made at the event is critical – first via email, then with the more serious leads via a phone call or best yet, a face to face meeting, where possible. At this stage, the services of an in-market consultant will also prove useful. For example, at The Gallery trade fair in Berlin, such services provided by the in-market consultant lead to business deals being secured for the participant exhibitors within a month after their trade fair participation.

Personal direct contact often times is necessary to seal a deal and may not be substituted by email or Skype.

Also remember to keep your promises, as this first impression could be lasting for your company with the international potential buyers. If you promise to ship a sample within a particular timeframe try to keep to this commitment, however, if you are unable to do so, it is important to keep the buyer updated at all times.

Trade fairs offer a unique platform upon which both buyers and sellers are able to discover new and exciting business opportunities...
This formula works! It works for engineers and architects. It works for management consultants, human resource professionals and PR firms. It works for musicians, designers and film producers. It works across all service sectors. But remember... it’s a formula! If you miss any one of the components, the formula won’t add up.

THE FIRST PART: OPPORTUNITIES!
Where are they? Everywhere, but you need to look for them!
• Look behind – to draw on your expertise, your credentials, your past successes, and especially your network of contacts;
• Look ahead – for future trends and market demands;
• Look to either side of you – for support, family, friends, employees, partners – past, present and future;
• Look up – for inspiration, imagination, innovation, creativity;
• Look close and look far – see the small picture and the big picture;
• Look all around you – and remember to write it all down!

THE SECOND PART: PLANNING!
If you don’t know where you are going, you will never get there!
You have identified opportunities! Great! They now need to be researched, analysed and strategised. More importantly, you need to write it all down! What is an engineer without a blueprint? What is a financial
planner without a spreadsheet? What is an exporter without an export plan?

- Are your services clearly defined and in demand?
- Do you understand your company’s strengths and weaknesses?
- How well do you know your target market?
- Is your promotional material/website world class and are you taking advantage of new electronic and media tools?
- Do you have ready-made proposal templates, letters of intent, partnership proposals?
- Research, analyse, strategise – and remember to write it all down!

THE THIRD PART: EXECUTION!

Do not wait until the conditions are perfect to begin. Beginning makes the conditions perfect.

- Do the most important things first! Get your team involved and engaged – entering new markets means new opportunities for them too;
- Set goals, timelines, roles and responsibilities;
- Schedule a certain day every week, or a certain time of day that you can devote to working on your export plan;
- Use technology tools to connect with prospective clients and partners internationally – make sure you use the right mix of SMS, email, Skype and good old-fashioned face-to-face;
- Get it done! Write it all down and get it done!

MORE ON EXPORT READINESS

For more information on export readiness, pick up your free copy of ‘Strategies for Service Exporters Series: Are You Export Ready?’ from your local CSI.

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STRATEGIES FOR SERVICES EXPORTERS

SOCIAL MEDIA MARKETING

WHY SOCIAL MEDIA MATTERS

Despite the time and money spent on fancy magazine ads and funny television commercials, it is well known in advertising circles that word-of-mouth is the most persuasive factor in purchasing decisions. In fact, 92% of consumers trust recommendations from people they know and 70% trust online reviews.

Social media is the new world conduit for word-of-mouth marketing. 67% of online adults use social media sites. In some Caribbean countries, as many as 100% of online adults use Facebook.

So, why social media marketing?

- First, it’s an inexpensive alternative to the more traditional marketing campaigns such as newspaper, radio and television. (Social media, however, should not replace all other marketing activities.);
- As noted above, word-of-mouth marketing conducted via social media platforms is a highly convincing form of marketing;
- It has a wide, international reach;
- It offers the opportunity to collect feedback from clients and to accordingly improve service offerings and delivery;
- It enhances credibility;
- It improves customer relations;
- And lastly, a thoughtful social media presence bolsters sales.

The truth is you can no longer opt out. Like it or not, your business is probably being talked about on social media platforms. Given this fact, it is better to take control of your company’s image by participating in the dialogue.

Available at your local Coalition of Service Industries
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During a seminar jointly organized by the Regional EPA Implementation Unit of the CARIFORUM directorate and the GIZ held in Antigua and Barbuda in October 2011, EPA Implementation Authorities identified the need to harmonize efforts in the implementation process and to jointly overcome implementation challenges. More specifically, it was agreed that communication and collaboration among units had to be increased and public-private dialogue (PPD) enhanced.

The GIZ EPA Implementation Support Project, on behalf of the German Federal Ministry for Economic Cooperation and Development, proposed to facilitate the establishment of a virtual platform which would provide an online space for easy information and knowledge sharing. It would also enable networking at a national and regional level, increase coordination and harmonisation by providing an “engine room” for implementing authorities and help to foster regional integration.

In May, 2012, the CARIFORUM EPA Implementation Network (CAFEIN) was launched during the Trade and Investment Convention (TIC) in Port of Spain, Trinidad and Tobago. The CAFEIN platform is two-tiered and includes both a public site dedicated to raising awareness of the CARIFORUM-EU EPA and an exclusive internal site (an “intranet”) with resources targeted at key EPA implementers.

To date, various sector-specific work groups have been set up creating the opportunity for greater dialogue on the various aspects of the EPA, including, for example, sanitary and phytosanitary measures (SPS), technical barriers to trade (TBT), investment and trade in services, among others. The work groups allow implementing authorities to share their experiences and lessons learnt, identify obstacles as well as opportunities in the implementation process, jointly expedite problem solving and finally, identify ways forward.

The next CAFEIN work group meeting (at time of writing) on SPS and TBT is scheduled to be held in Montego Bay, Jamaica in November 2013. Participants include representatives from the public and private sector as well as the CARICOM Regional Organisation for Standards and Quality (CROSQ) and the Inter-American Institute for Cooperation on Agriculture (IICA).

**EXPECTED OUTPUTS**

- More effective and efficient implementation
- Increased awareness of stakeholders’ activities
- Improved coordination and increased interaction among stakeholders
- Better harmonization and planning of stakeholder’s work
- Enhanced communication
- Improved best practices
- More efficient use of resources
- HR development

**CONTACT:**
Check out our website: cafein-online.net
Like us on Facebook: facebook.com/cafeinonline
Follow us on Twitter: twitter.com/cafein_online

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# ACRONYMS

| ACP: African, Caribbean and Pacific (States) | EU: European Union |
| BRIC: Brazil, Russia, India, China | FDI: Foreign Direct Investment |
| CARICOM: Caribbean Community | GATS: General Agreement on Trade in Services |
| CARIFORUM: Group of African, Caribbean and Pacific States | GDP: Gross Domestic Product |
| CCJ: Caribbean Court of Justice | GIZ: Deutsche Gesellschaft für Internationale Zusammenarbeit |
| CE: Caribbean Export Development Agency | ICC: International Cricket Council |
| CEDA: Caribbean Export Development Agency | ICT: Information and Communication Technology |
| CNSC: Caribbean Network of Service Coalitions | ILO: International Labour Organization |
| CSI: Coalition of Service Industries | IPR: Intellectual Property Rights |
| CSME: CARICOM Single Market and Economy | ITC: International Trade Centre |
| EC: European Commission | LDC: Least Developed Country |
| EPA: CARIFORUM-EC Economic Partnership Agreement | OECD: Organisation for Economic Co-operation and Development |
| OTN: Office of Trade Negotiations |
| SIDS: Small Island Developing States |
| SME: Small and Medium Sized Enterprises |
| STRI: Services Trade Restrictions Index |
| TISA: Trade in Services Agreement |
| UNCTAD: United Nations Conference on Trade and Development |
| UNDP: United Nations Development Programme |
| UNESCO: United Nations Educational, Scientific and Cultural Organization |
| UWI: University of the West Indies |
| WIPO: World Intellectual Property Organization |
| WTO: World Trade Organization |
Get the Scoop, the Services Scoop!

I am pleased to present, for your reading pleasure, the third annual edition of Services Scoop!

Services Scoop, a publication of the Caribbean Network of Service Coalitions (CNSC), is presently the only magazine in the world focused exclusively on issues affecting the services sector. Comprising of submissions from key services agencies and leaders across the globe and with an international circulation, including every continent except Antarctica, Services Scoop continues to develop into an important trade awareness tool.

Services Scoop covers four core areas: Services Matter – which highlights why services and trade in services are important to our economy and features some of the more technical submissions, Services Coalitions – which enforces the roles and objectives of our regional coalitions, Services Support – a section offering guidance to would-be services exporters and Services Success – where noteworthy regional export achievements are identified and celebrated.

We are happy for the advancements made in the region during 2013, many of which are highlighted herein. We hope that our efforts to raise understanding of services issues continue to generate the support needed for the development of this sector.

For those of you who missed the first two editions, they are available on the CNSC website (http://c-nsc.org). We’d like to encourage all of you to get involved by ‘liking’ the CNSC on Facebook and participating in the discussions and by supporting the efforts of your local coalition of service industry.

Enjoy the read.

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