INCREASING LOCAL ECONOMIC BENEFITS FROM THE ACCOMMODATION SECTOR IN THE EASTERN CARIBBEAN

SUPPLEMENTARY REPORT I – LITERATURE REVIEW

A report by

Travelwatch
for
The Travel Foundation

Supported by the UK Foreign and Commonwealth Office

Foreign &
Commonwealth
Office

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Supplementary report by Travelwatch to the Travel Foundation May, 2006[1]

Tourism in the Caribbean

Tourism is the dominant economic sector in the Caribbean region as a whole. Estimates of the precise contribution of the industry to the region vary, but according to the World Travel & Tourism Council, in 2005 tourism will:

* generate circa US$45.5 billion of economic activity
* directly support 5.0% of jobs and indirectly support 15.1% of all jobs
  Overall direct and indirect 2.4 million jobs in 2004 rising to 3.4 in 20014
* contribute 15.4% of GDP
* generate 20.7% of all capital investment (WTTC, 2005).

It is clear from these figures, that the Caribbean region is highly dependent on the tourism economy. In this region, a higher percentage of all employment relies on the travel and tourism industry than in any other world region as illustrated in table 1.

Table 1 - Travel and tourism economy employment (2005 % of total employment)[2]

Global ranking	Global region	Travel and tourism as % of total employment (2005)
	WORLD	8.3
1	Caribbean	15.1
2	Oceania	14.8
3	North Africa	12.4
4	North America	12.3
5	European Union	12.1

The region is the most dependent of all the world regions on the tourism sector for its contribution to GDP and capital investment.

The relative importance of the tourism industry to different islands varies significantly. Some states, with well developed tourism and rich natural and agricultural resources, depend on tourism for a relatively small percentage of GDP (circa 10%), whereas other states are almost wholly dependent on the tourism sector for economic activity. Even within island states, there can be significant disparities. In the Republic of Trinidad and Tobago, for example, Trinidad has rich oil reserves and a relatively well developed industrial sector and relies on tourism for less than 3% of its GDP while neighbouring Tobago gains somewhere in the region of 30% of its GDP from tourism.

Table 2 illustrates the number of arrivals to different destinations in the Caribbean region and provides an illustration of the percentage of all employment (direct and indirect) and GDP that is tourism dependent.

[1] **Please note that this report has not been edited or formatted to the same standard as the main report.**
[2] WTTC (2005) *The 2005 Travel & Tourism Economic Research – Caribbean*, WTTC, Brussels p 19

Table 2 – Tourist Arrivals to Caribbean Islands 2002 and contribution of tourism to the employment and economy (2005)

Destination	Arrivals[3]	Jobs generated by tourism (%) (direct and indirect employment)[4]	2005 Travel and tourism economy GDP [5]
Anguilla	43,798	77.3	71.4
Antigua and Barbuda*	**198,084**	**95**	**86**
Aruba	642,627	85.8	70.9
Bahamas*	1,428,209	68.7	54.7
Barbados	497,899	55.3	48
Bermuda*	283,967	24.5	20.4
Cayman Islands	302,797	36.8	29.9
Cuba	1,686,162	11.3	13.2
Curacao	217,963	8	6.5
Dominican Republic*	**2,793,581**	**19.8**	**22.9**
Grenada	**132,416**	**22**	**24.3**
Haiti	108,868	4.7	6
Jamaica	**1,266,366**	**31.9**	**36.2**
Martinique	447,891	9.3	8.9
Puerto Rico**	1,065,462	6	5.8
St Lucia	**253,463**	**43.2**	**42.8**
St Vincent and Grenadines	47,747	28.6	31.8
Trinidad and Tobago	**175,755**	**10.4**	**10.7**
US Virgin Isls.*	489,156	40.3	33.7
** Non resident air arrivals*			
*** Non resident hotel registrations only*			

Tourism and the Caribbean economy

Tourism is clearly, therefore, an important economic sector in general terms, bringing foreign exchange income into the region and providing employment. The economic contribution of tourism to the region in real terms is often disputed because:

- Although some islands are relatively self-sufficient as regards agricultural production, oil and water, most are not. This means that the level of imports required to sustain the tourism industry in the region is relatively high and it is claimed that these imports mean that much of the income generated from tourism leaves the island economy with only limited benefit to local people. In St Lucia, for example, the foreign exchange leakage rate from gross tourism receipts is 56%, in Aruba 41%, in Antigua and Barbuda 25% and in Jamaica 40%.[6]
- The development of a type of tourism that is based on large-scale resort or cruise ship complexes that are not locally owned. Again, there are notable exceptions to this rule, but in general it is claimed that the infrastructure for these types of tourism is generally imported and owned by international conglomerates rather than local

[3] Caribbean Tourism Organisation (2003) *Key Tourism Statistics* Vol 1, No 1, Jan – Mar 2003, pp 3.
[4] WTTC (2005) *The 2005 Travel & Tourism Economic Research – Caribbean*, WTTC, Brussels p 36
[5] As above.
[6] (http://www.caribvoice.org/Travel&Tourism/paradise.html)

business people and, thus, profits from tourism activity leak from the island economy. In the Dominican Republic, for example, the vast majority of the accommodation stock is in international ownership. [7]

- The relative dependence on international tour operators to provide trade to the region and the level of commission charged by these businesses, which leaves accommodation and other service providers with very limited profit margins and relatively limited power in setting their own prices.
- IT also limits the ability of small tourism providers to reach their market.
- The development in recent years of tourism to integrated resorts and cruise ships. It is claimed that these types of tourism provide as little as US$90 dollar per passenger per night to the local economy.[8] In the case of cruise ships at least, it is claimed by some that the costs of providing waste disposal, port and other services, may outweigh the net economic contribution from some operators.[9]
- The lack of skilled staff available or lack of willingness of international tourism businesses to employ local people, meaning that senior management positions are often occupied by individuals who are not native to the island or often the region.[10]
- Wages and labour rates are 13% of room revenue. Only North America and Europe have higher costs according to the Economist Intelligence Unit in 1990 and regional comparisons have not changed significantly in the last decade.
- The relatively high level of investment in infrastructure by Caribbean states to facilitate the tourism industry and – for the most part – the loss making nature of this infrastructure. Most publicly owned airports in the region, for example, operate at a loss.[11]
- In some areas the lack of alternative job opportunities to tourism.[12]
- High turnover of staff indicating that employment in tourism is seen as a stepping stone to other careers.
- The fact that tourism increases prices for local people.

Some commentators, including the World Bank, have claimed that the type of "mainstream" tourism that has come to dominate the region is not competitive within a world tourism market and cannot be sustained. Some of these commentators advocate the development of a different type of tourism - "niche" tourism - focussing on issues such as ecotourism, health tourism, adventure tourism and so on.[13] It is the view of some consultants that have studied this region that it is better to focus on improving the contribution that the current tourism industry makes to the island rather than focusing on the development of new niche tourism products.[14]

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[7] Journal of Tourism and Cultural Change (2004) Small Entrepreneurs and shifting identities – the case of tourism in Puerto Plata, Vol 2, Issue 3, pp 185 – 201.

[8] FCCA (2003)

[9] **http://www.lighthouse-foundation.org/lighthouseFoundation.org/eng/forum/artikel00304eng.html#fragment3d**

[10] Journal of Tourism and Cultural Change (2004) Small Entrepreneurs and shifting identities – the case of tourism in Puerto Plata, Vol 2, Issue 3, pp 185 – 201.

[11] World Bank (2005) *A time to choose – Caribbean Development into the 21st Century*, Caribbean Country Management Unit, Poverty Reduction and Economic Development Unit, Latin American and Caribbean Region, pp xxviii

[12] Journal of Tourism and Cultural Change (2004) Small Entrepreneurs and shifting identities – the case of tourism in Puerto Plata, Vol 2, Issue 3, pp 185 – 201.

[13] World Bank (2005) *A time to choose – Caribbean Development into the 21st Century*, Caribbean Country Management Unit, Poverty Reduction and Economic Development Unit, Latin American and Caribbean Region, pp xxviii

[14] GTZ, Langefeld, K, S Karammel and K Berndt (2004) *All inclusive resorts and local development as best practice in the Caribbean* A presentation made by GTZ to WTM on Nov 10, 2004. Slide 6

Most of the assumptions stated above are not based on detailed multiplier studies that demonstrate the benefits of tourism to the Caribbean economy in general or to the economies of specific island states in particular. Most also take only a partial view of the contribution that tourism makes to the economy – focussing on employment, expenditure on products and services rather than contribution to local taxes and infrastructure.

The fiscal regime related to the accommodation sector in the region is perceived in the region to be amongst the most stringent globally and provides vital revenues for local government. Import duties (applied to tourism businesses as well as others) in the islands are on average 15% of tax revenue. These fiscal instruments ensure that tourism, alongside other types of businesses, contributes in indirect ways to the local economy (especially since food, beverages and tobacco - all prominent among tourists' consumption - tend to attract the highest levels of duty).[15]

Accommodation is the key sector of the Caribbean economy, accounting for around one-third of all tourism-related employment (direct and indirect). Overall, in 2000, the CTO estimated that the Caribbean region had circa 251,300 rooms available for staying guests with annual occupancies running at circa 64%.[16] Table 3 provides accommodation capacity and annual occupancy figures for five of the islands that are the focus of this study.

Table 3 – Accommodation capacity in hotels and similar establishments in five islands of the Caribbean in 2003

	Trinidad and Tobago	**St Lucia**	**Grenada**	**Dominican Republic**	**Jamaica**
Number of rooms (units)	5,378	3,749	1,758	56,378	20,827
Number of bed spaces (units)	ND	6,748	3,844	140,945	43,909
Occupancy rate (%)	41[17]	62.7	71[18]	72.7	57.9
Average length of stay (nights)	ND	10	7.65	9.53	6.4

Source: WTO (2005) *Compendium of Tourism Statistics, WTO, Madrid*

The study aims to build on work already undertaken in the wider Caribbean region (and notably the work undertaken by Abdool and Carey in 2004[19], and GTZ, also in 2004) to understand the relative contribution that different types of accommodation make to the local economy in up to six island states. This study is supported by calls from island states (including St Lucia, Barbados) and financial institutions (e.g. the World Bank) to better understand the ways in which tourism can influence the economy of Caribbean states. The work builds on existing knowledge to provide a snap shot of ways in which accommodation currently supports the economy in selected Caribbean states and to understand, from current best practice, ways in which the relative contribution of different types of accommodation can be improved.

[15] World Bank (2005) *A time to choose – Caribbean Development into the 21st Century*, Caribbean Country Management Unit, Poverty Reduction and Economic Development Unit, Latin American and Caribbean Region. P xxv
[16] As above
[17] 2002 Data
[18] As above
[19] Abdool, A and B Carey (2004) *Making All Inclusives More Inclusive*, The Travel Foundation, UK.

The economic contribution of different types of accommodation

All-inclusive resorts (AI)

AI resorts are the fastest growing sector of the tourism accommodation sector in the Caribbean. While AI resorts still account for only a modest percentage of total accommodation stock in the region, on some islands such as the Dominican Republic, for example, AIs comprise 72% of the islands accommodation capacity[20] and 33% in Trinidad and Tobago.

Studies to date have illustrated that AI resorts:

- Can have a more beneficial impact on the local economy than many had presumed. Table 4 highlights the benefits that targeted studies have attributed to AI resorts in Trinidad and Tobago, and to the Dominican Republic, Jamaica and Nicaragua (which lies in the Latin American region).
- The relative level of impact that AI resorts have on the local economy apparently depends on the type of policies that the company and/or government of the region have in place. Programmes to train staff, to invest in capacity building, to purchase produce locally and to build partnerships with local communities can provide a significant boost to the local economy. One AI operator in Jamaica, for example, spends a total of US $600 per employee per year for training related activities (GTZ et al, p 14, see p3 of this report).
- The origin of the parent company may have some bearing on policies. The AI operator that appears to operate at best practice levels is Jamaica based and operates three resorts in its home island.
- Contrary to popular opinion, most AI operators pay at least at the legal minimum wage level (and studies by the World Bank indicate that the legal minimum is adequate or generous in most Caribbean countries).
- AI resorts can help to plug skills gaps by providing training for the local workforce.
- AI resorts can underpin agricultural development and can ensure that farmers are able to sell their products at a level above subsistence agriculture.
- AI's can provide greater economic benefits for the local economy than primary agriculture. According to one report, the salary bill of seven AIs is the equivalent to 780 to 7,800 acres of coffee plantation (Ref GTZ).

It should be noted that:

- The AI product is rapidly evolving and changes in the product offer (for example, to allow tourists to mix an AI break with more conventional accommodation, or to select from a menu of AI options) will influence the amount of income that remains in the local economy.
- The AI product is one of the most rapidly developing sectors of tourist accommodation and the development of new AI resorts (even when converting hotels into AI accommodation) will have an impact on jobs within other tourism-related businesses in the local economy. From the limited information that is available, it would appear that the renovation of an existing hotel into an integrated resort forced 5 restaurants (from a total of 11) out of business with a loss of circa 50 jobs in the Dominican Republic. The resort, in turn, created 50 – 100 new jobs, but no information was available about the level of this employment. It is estimated that the conversion into an AI also increased food consumption by the resort, thus increasing income and jobs in local agriculture. (GTZ, pp 11).

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[20] Travel & Tourism Intelligence (October 2003) *Country Tourism Reports – North America and the Caribbean*, MINTeL, UK.

Table 4 – The contribution of AIs to the economy

		GTZ	Abdool & Carey
All Inclusives	Number of jobs created/resort	190 -450 per resort	200
	Total salaries	320,000 - 3,200,000 PA	
	Occupancy		78% high and 68% low
3 - 4 star	Number of jobs created/room	0.5 – 2	2
All	% of permanent jobs	90	60
	Number of indirect jobs/direct job	circa 2 – 4	
	Pay minimum wage	Yes	Yes
	Net wages for different career levels	US$450 - 1,150/month	
		Sandals US$ 700 and 1,150 US$/month	
	Additional benefits	Training (120 hours per year in Sandals)	
		Training value US$85 per line staff	
		Support for training centres and higher ed. Sandals US$5 million per year or US$600 per employee per year.	
		Free meals and pension US$200 per month	
		Community outreach - schools programme	
	Purchase of goods and services	US$ 1 - 2 million on goods and services	
		Sandals only resort to actively support local farmers	Linkages with local community poorly developed
		20% of the one week sandals package price is the minimum that is distributed through staff salaries and purchase of goods and services)	
	Average price per person per night		£39 pppn
	Length of stay		13.4

- The development of AI's will adversely affect some activities. For example, local entrepreneurs may be adversely impacted by the development of relatively homogenous AI resorts.[21]
- The AI product is dominant in Jamaica and the Dominican Republic where security issues may otherwise have deterred tourist visits (Table 4 illustrates the AI operators in the Dominican Republic and Jamaican market) and is less important in other islands where there is a much smaller number of resorts.
- Studies thus far highlight that only one AI operator apparently operates at best practice levels in the region. The economic contribution of others to the local economy is less well researched and presumably lower.
- AI products come in a number of iterations from luxury (including accommodation, all meals, all beverages, entertainment and spa facilities), to mid range (offering all meals, most beverages, some entertainment) and value (offering all meals, some beverages and limited entertainment). They cater for different markets, predominantly targeting couples and families. The feature common to all AI style operations is the fact that residents enjoy all meals and all or a proportion of drinks within the resort and pay for these as a core part of the package price. This means that – rather than individual tourists spending their income on meals, drinks and other amenities outside of the resort – within the AI concept it is the accommodation provider who is responsible for this expenditure and thus the trickle of finances through the economy.
- Information about the contribution AI resorts make to the local economy generally focuses on a small number of resort operators and on a limited number of products rather than on the total range of products purchased. It is likely that the impact of some AI's is far greater than others.
- All research is based on a very small sample of resorts with the focus on Jamaica, The Dominican Republic and Tobago.

Table 5 provides a list of the main AI operators that currently have resorts in the Dominican Republic and Jamaica

Hotel Accommodation

Overall, hotels are the dominant type of accommodation available in the Caribbean. Many hotels now offer an All Inclusive board option alongside half board or bed and breakfast and many tour operator brochures offer a choice.

Average occupancies across the region as a whole are around 72% with an average room rate of around US$160.92.[22]

The Caribbean has a wide range of hotels, from large scale international hotel and conference centres (owned by island nationals and international conglomerates) to small independent guest houses. Hotels clearly vary significantly in their size and the nature of their operation. The Caribbean Hotel Association rates 65% of all hotels in the region as small with under 75 rooms. Very little information exists to substantiate claims about the overall contribution of the hotel sector to the economy. In general, it is thought that:

[21] Journal of Tourism and Cultural Change (2004) Small entrepreneurs and shifting identities – the case of tourism in Puerto Plata, Vol 2, issue 3, pp 185 - 201
[22] Caribbean Tourism Organisation *Key Statistics 2004*, CTO

- Locally owned and small scale accommodation is likely to make a higher contribution to the local economy than larger and internationally owned establishments)

Table 5. Main tour operators

Operator	Head office location	Brands	Market segment	Sales mechanisms	Location of resorts
Club Med	France	Club Med	Couples and families	Direct and through specialist agents	
Issa Resorts	Jamaica	Couples	Couples only	Direct and through specialist agents	Couples Ochos Rios, Couples Negril, Couples Swept Away Negril
Sandals	Jamaica	Sandals and Beaches	Sandals for couples and Beaches for families	Direct and through specialist agents	7 resorts in Jamaica, 3 in St Lucia, 1 in the Bahamas, 2 in Cuba, 1 in Antigua
Super Clubs	Jamaica	Grand Lido, Hedonism, Breezes, Starfish	Hedonism for singles and couples, Grand Lido luxury couples only, Breezes value brand for families	Direct and through specialist agents	12 properties in Jamaica, Curacao, the Bahamas, Dominican Republic, Brazil
Amhsa Marine	Dominican Republic				8 properties in DR and 2,821 rooms
Occidental	Dominican Republic				9 properties in DR and 3822 rooms
Iberostar	Spain				
Barcelo	Spain				15 properties in the DR and 4106 rooms
Sol Melia	Spain				2 properties in the DR and 1,289 rooms

Source – MINTeL 2005 – All Inclusive Holidays – The UK

- The hotel sector employs less people per room available through direct employment than the AI resorts.
- Hotels may adopt policies (especially vis-à-vis local purchasing and local employment) that will have a positive impact on the local economy for example IBLF, Green Globe, FTO.

Self-catering villas, cottages

We have found no published information to identify the overall contribution of the self-catering sector to the economy.

Cruise Lines

The CTO estimate that cruise passengers in the region accounted for some 48.4 million bed days in 2000.[23] The contribution of the industry to the region as a whole is US$2.6 billion per annum.[24] The cruise industry has continued to outperform other sectors globally with 10% more passengers being recorded for the first half of 2004 over the previous year with passengers from North America showing particularly strong growth of circa 11%.[25] The cruise industry operates across the region, but the relocation of the home port of some cruise lines following the events of September 11th to Florida from Puerto Pico has favoured those islands in the north Caribbean region. Table 5 lists the major cruise operators in the region.

- Of the 8 major cruise lines operating regularly in the Caribbean, six own private islands which they include among their ports of call, thus cutting local ports (and economic benefits) out of the cruise itinerary.[26] For some cruise lines stopovers are very brief and passenger time on the islands is almost non-existent. In the Dominican Republic, for example, the stopover time is too short to allow passengers to visit Santa Domingo.[27] The estimated amount a cruise passenger will spend on an island excursion is £40 and not all passengers disembark.
- The creation of private clubs by some cruise lines in the ports of call is a cause for concern.[28]
- Dumping of cruise ship waste is also a cause for concern with IMO estimating up to 2 kg per person per day. Port authorities in the islands are obliged to provide facilities to dispose of this solid waste despite a dearth of available sites for solid waste
- Cruise ships employ only a small percentage of nationals of the Caribbean islands. Some consider that less than 7% of all employees of cruise ships are nationals of the islands.[29]
- Islands invest heavily in the infrastructure to facilitate cruising. The Dominican Republic, for example, has invested more than US$3.6 million since 2002 in opening up new and upgrading existing port facilities.[30]
- Cruise lines are perhaps among the most volatile of accommodation operators. They are able to change their itineraries to respond to disasters (whether natural or man made) or to changes in port duties.

Cruise lines are possibly also the most difficult sector to target to improve the level of income that remains in the local economy. Their mobile nature means that they can stock up at their home port, making minimal purchases on route.

The CTO's strategic plan for 2002 calls for an increase in cruise ship tourists to stayover tourists. The cruise lines FCCA survey shows that that 25% of stayover tourists return

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23 file:///C:/Documents%20and%20Settings/Rebecca/Local%20Settings/Temporary%20Internet%20Files/Content.IE5/KLAJCXMR/259,6,Employment in Tourism Industry

24 Travel & Tourism Intelligence (October 2003) *Country Reports – North America and the Caribbean*, MINTeL.

25 IPK Consulting (2004) *World Travel Market Global Report, 2004, p 5*

26 http://www.lighthouse-foundation.org/lighthouse-foundation.org/eng/forum/artikel00304eng.html# fragment3d

27 Travel & Tourism Intelligence (October 2003) *Country Tourism Reports – North America and the Caribbean*, MINTeL, UK

28 As above

29 (http://www.lighthouse-foundation.org/lighthouse-foundation.org/eng/forum/artikel00304eng.html# fragment3d

30 Travel & Tourism Intelligence (October 2003) *Country Tourism Reports – North America and the Caribbean*, MINTeL, UK

following a cruise holiday and, in another survey, 40% would like to return for a land-based holiday in the Caribbean[31].

Weaknesses/shortcomings of the available literature

The weakness of many research studies is that it is the companies that are operating at best practice levels are generally willing to provide comprehensive data and those that are operating to poor standards are not. It is also evident from the literature reviewed that:

- Best practice generally focuses on:
    - The AI sector as opposed to other forms of accommodation and Sandals within the AI sector in particular
    - The purchase of very specific products (e.g. melon) as opposed to looking at the percentage of total food products that are sourced locally and/or the potential to substitute products that are sourced internationally with local alternatives
    - Defined areas e.g. the local fish purchasing initiative in Montego Bay, Sandals.
    - The success of very specific initiatives such as the Adopt a Farmer network, without looking at the context i.e. percentage of total tourism supply on an island that is serviced by these schemes and the number of farmers that are able to access them
    - The impact of employment on the local economy (in terms of direct jobs generated in resorts and employment terms and conditions)
- Research is often based on very small sample sizes (with total samples of circa 10 properties)
- There is little systematic comparative analysis of the impact of policies to improve sustainability e.g. local purchasing policies
- Economic impact studies focus on what hotels spend their money on and not on the benefits of local economic input to them
- Economic impact studies do not weigh up the benefits of paying tax on imported products (in a high tax regime) vs. buying products which are subsidised by Government and locally purchased
- There is no analysis of the impact of centralised purchasing systems in some accommodation groups and what centralised purchasing means in the Caribbean area
- There is conflicting data on cruise lines – the industry association has produced prolific information form its own standpoint. This does not take into account the costs to destination authorities of building and servicing ports or the real level of spend of cruise passengers in destinations (where there is conflicting data).

It is difficult to obtain a genuine picture of what is happening in the economy as a whole and between islands because:

- The Caribbean is not one area, there is acknowledged to be competition between islands destinations
- Security issues and changing weather patterns
- Increase in volume of cruise business
- Lack of data in the accommodation sector

[31] CLIA, Overview, Spring 2004.

- Lack of innovation, investment and product development in the region
- Increased leisure travel opportunities to other destinations
- Diminished economic growth in many source markets
- Changing consumer patterns
- Changing distribution systems
- Shorter booking windows
- Changing travel patterns – family groups – special interests

Some recommendations from available literature

A number of organisations – predominantly funded by the international finance organisations – have proposed solutions and these include:

- Minimum Wage.

Looking at the level of the national minimum wage (which can be relatively high in some islands) because of regulatory pressures (World Bank p xxx)

- Education

Most islands have a relatively good standard of education (although attainment of basic skills varies significantly between islands and genders). However, there is an apparent disconnect between the educational curricula and the skills demanded in the private sector and this has been exacerbated by the decline in manufacturing and agriculture and the shift towards the service sector (World Bank p xxxi)

- Skills Development

There is also a relative scarcity of skilled labour (individuals having completed tertiary level education), especially among the young in some countries (e.g. The Dominican Republic) – World Bank (p xxxi)

- On Job Training

Relatively low level of on the job training in some islands. 41% of private sector companies provide on-the-job training in Trinidad and Tobago and 85% in the Dominican Republic with an average of 65% of companies for the region as a whole providing such training (this compares to 75% in the Latin American region). Clearly on the job training is crucial to providing and retaining the skills necessary. (World Bank, pp xxxiii).

- Operational Review of Ports and Airports

Identifying changes to the way in which public sector airports and ports operate. Generally public airports fail to cover full costs and so represent a fiscal burden. World Bank, pp xxxiv)

- Improving investor confidence
- Investing in sustainability
- Developing local supply and buying local products

A Time to Choose – Caribbean Development in the 21st Century by the Caribbean Country Management Unit, Latin America and Caribbean Region. World Bank Report no. 31725-LAC, April 2005.