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**REPORT OF THE  
GRENADA NATIONAL YACHTING CONSULTATION**

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## **REPORT OF THE GRENADA NATIONAL YACHTING CONSULTATION**

### **Introduction**

The Economic Commission for Latin America and the Caribbean (ECLAC) Subregional Headquarters for the Caribbean embarked on a project “*Development of a Subregional Marine-based Tourism Strategy*” in 2001. The project, co-funded by the Government of the Netherlands, is aimed at the development of sustainable yachting tourism in the Eastern Caribbean and focuses on the island arc from the British Virgin Islands in the north to Trinidad and Tobago in the south.

The project includes the conduct of national studies in the British Virgin Islands, St. Maarten, Antigua and Barbuda, Saint Lucia, Saint Vincent and the Grenadines, Grenada and Trinidad and Tobago. In all countries the national studies were preceded by consultations with the private and public sector and, following completion of the national reports, the findings were similarly discussed through a private and public sector consultation.

On 26 March 2003, as part of the project’s activities, a national consultation on yachting in Grenada was convened by the Ministry of Tourism, Civil Aviation, Culture, Social Security, Gender and Family Affairs in collaboration with the Marine and Yachting Association of Grenada (MAYAG) and ECLAC.

One of the objectives of the consultation was to review the report “Grenada, Carriacou and Petit Martinique: The Yachting Sector” that was prepared by the ECLAC Subregional Headquarters of the Caribbean and co-sponsored by the Government of the Netherlands. A second objective included the provision of a forum for a private sector-government discussion on yachting and the pleasure boat industry and its contribution to Grenada. The final objective was the identification of ways and means to increase the contribution of yachting as a viable component of the tourism industry in Grenada.

Participants were drawn from the public and private sectors, representing the major stakeholders in the marine industry. A list of participants appears at Annex 2.

### **Opening**

The Permanent Secretary, Ms. Elizabeth Henry Greenidge, welcomed the participants and introduced The Honourable Minister of Tourism, Ms. Brenda Hood. The Minister, in her opening address, described the consultation as timely since this was the first time that a separate study on yachting had ever been done in Grenada. The Minister stated that the economic impact of yachting could not be underestimated and that the Government of Grenada was aware of the importance of the yachting sector.

In this respect the Minister noted the sharp increase in employment in 2001 as compared with 1997. This indicated that the opportunity for jobs was indeed promising for the sector. The Minister indicated that her government was willing to work with participants to ensure that some of the recommendations were implemented.

The Minister noted that yacht calls had been increasing and that the revenue generated was felt throughout the economy. Its awareness and support of the yachting industry was evidenced by the support given to the soon-to-be-constructed marina in Carriacou.

In closing, the Minister noted that her Ministry had been working diligently with the sector to ensure the development of a yachting tourism product of which everyone could be proud.

The Director of the ECLAC Subregional Headquarters for the Caribbean, Ms. Len Ishmael, outlined the background of the project and informed of similar yachting studies being conducted in St. Maarten, Antigua and Barbuda, Saint Lucia, Martinique, Grenada and Trinidad and Tobago. In focusing on Grenada, the Director observed that the Grenada economy was characterised by extreme volatility and stressed the need for the smaller economies to diversify their productive base. For example, robust growth rates of 7.3 % and .5 % as the previous millennium came to a close in 1998 and 1999 were replaced by alarming declines of 3.4% in 2001 followed by 0.6 % in 2002. The hotel sector demonstrated a similar pattern. Less than robust growth of 2.1% in 1998 was followed by hefty gains of 11.2% in 1999, dropping to 2.9% in the following year, followed by a contraction of 4.3% in 2001.

For those reasons, it was absolutely imperative that smaller economies such as Grenada sought to diversify their productive base, structure and composition. It was in that context that ECLAC had envisaged an increasing role for the yachting subsector in the development of this and other countries in the eastern Caribbean. A major policy implication deriving from these studies related to the economic impact of the yachting sector. In all but one country - St. Maarten with close to 1 million cruise ship visitors in 2001 - direct expenditure of the yachting sector contributed more than cruise ship tourism. Given the tremendous and continuous investment in facilities for cruise liners, and the general lack of a comprehensive framework for the delivery of effective support for the yachting sector, this finding was one with critical policy implications for many of the islands involved in this project.

ECLAC also observed that there seemed to be a rather natural selection within the Organisation of Eastern Caribbean States (OECS) and the Eastern Caribbean in differentiation of product as one moved from north to south.

Implicit in that specialisation lay the seeds of a subregional strategy based not on competition - in any event yachts were highly mobile - but on complementarity of services and products. The possibility existed, for example, for Grenada and Saint Vincent and the Grenadines anchoring the northern and southern boundaries of some of the world's most renowned sailing waters, to consider a strategy of mutual benefit in the promotion and management of direct investments in the provision of services and facilities strategically located throughout the Grenadines.

The Director concluded by acknowledging the contribution of consultants, Cuthbert Didier and Ivor Jackson, and expressing the hope that the consultation would point the way for the development of the subregional yachting sector.

### **Presentation by Mr. Ivor Jackson**

Mr. Jackson highlighted the marine culture of the country as reflected in the boat building tradition and the traditional regattas.

The study estimated that yachting contributed EC\$36 million to the economy (as compared with cruise ship tourism of EC\$7 million). The sector also provided direct employment for 250 people. At present there were seven marinas or boat yards, three of which were built in the last four years. There were proposals for four to five more.

The study identifies a number of issues critical to the development of a sustainable yachting industry in Grenada:

- Environmental issues, in particular the management of waste oil and junk, domestic wastes, anchor damage, boat wastes;
- Risks to health and resources by failure to use the proper equipment or the use of materials (such as TBT containing paint) that are banned in, for example, the United States;
- Lack of product and quality standards for the yachting industry. The study notes that there are no standards for the yachting sector. On the other hand, standards for the accommodation sector set, for example, the conditions for licensing and registration and are administered by the Grenada Bureau of Standards. The question arises if similar standards should be applied for yachting;
- Weaknesses in hurricane protection and emergency plans for marinas and boatyards;
- An inadequate enabling investment environment whereby the existing legal instruments provide for allowances for the importation of yachts, marinas with a hotel component but not for marinas or boatyards;
- The small membership base of MAYAG, the lack of linkages between the Grenada Board of Tourism and MAYAG and the lack of an institutional structure or plan to market the country as a yachting destination;
- Shortcomings in planning, research, regulation and monitoring were also identified as additional needs;
- Accounting for goods sold in bonded facilities, duty exemption for imported yachts, delays in clearing ships' stores, who pays for overtime and the 72 hours window for clearance;
- Critical skills were missing and training is considered critical in view of technological advances, shore-based skill requirements and on-board skill opportunities;
- The undeveloped berthing and visitor infrastructure in Carriacou; a lack of mega yacht facilities; a poorly managed visitor database, limited capacity for managing marine resources and an inadequate system of moorings for environmentally sensitive anchorages.

Among the actions to be considered, the report recommended:

- The development of an improved enabling environment for investment in yachting;
- The establishment of effective mechanisms for public/private sector consultation, e.g. MAYAG to be represented on the Board of GBT;
- Improved data management;
- MAYAG to expand and to employ a paid CEO;
- Customer service training for customs and immigration officers;
- Disaster mitigation and emergency planning for the yachting sector
- Policy guidelines on trading from live-aboard yachts;
- A needs assessment on skills and training requirements for the sector;
- Clear but firm procedures for environmental impact assessment (EIA) and audits to ensure environmental protection and the private sector to lead initiatives on environment and industry standards;
- Reduce the impacts from industrial uses and wastes associated with the industry; and
- Protect coral reefs, pristine waters and other heritage resources on which yachting depends.

Discussions then centred on the difference between cruisers and live-aboards. The participants felt that most yachting visitors were cruisers and not live-aboards, but that there were no proper definitions of either category so that the distinction remained unclear and somewhat subjective. It was observed that a similar situation existed in Trinidad and that there also were no suitable definitions.

It was observed that problems in the disposal and recycling of waste oil did not affect the marine sector alone but were territory-wide. Waste oil was not alone in this as most terrestrial environmental problems eventually ended up in the marine environment. An example was given by a company that would like to connect to the sewerage system, but was advised that, as sewage was not treated, such a connection would actually worsen the pollution situation. Other issues brought to the fore were the illegal fishing or harvesting of corals; the impact the sector and marinas had on the removal of mangroves and the subsequent chain reactions which followed such a removal.

Additional comments were made on the prohibition of anchoring and the Grande Anse beach, and on problems that may arise in determining saturation points of yachts in anchorages.

### **Focus groups**

The participants were requested to form four focus groups to discuss recommendations and follow-up activities and strategies that could be implemented in the short term. The four groups were in the areas of training and human resource development and data and research; institutional development; investment marketing and product development; and environment.

## Training/Human resource development and data and research

The recommendations of this group were split between training/human resource development and data and research.

- Training/Human resource development
  - Establish regular consultations between MAYAG and the Ministry of Education. MAYAG and the Ministry to develop an awareness programme for the public and the educational sector itself on career opportunities and training which might exist on a national, regional or international basis.
  - Carry out a needs analysis of required types of professionals and identify needed training. This could be done in cooperation with other OECS countries and should also include regional institutions such as the Jamaica-based Maritime Institute.
- Data and research
  - Use data that is available at the ports of entry;
  - More intricate use of the airport computer;
  - MAYAG/GBT and the Ministry of Tourism to perform a lead role in the data collection effort but should forward the data to the Central Statistical office.
  - Carry out surveys at points of exit. These surveys should include not only airport surveys but also the official port of entry.

## Institutional development

- Establish a system of consultation between government and the marine sector by:
  - Appointing MAYAG as a member of the Grenada Board of Tourism, and by developing a system of consultation between relevant government agencies and the private sector through MAYAG and specific focal points in agencies such as customs immigration coast guard and port authority

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