

Final Report

Volume 1: Consolidated Report

Submitted to



By

Dr. Noel Watson and Ms. Lucia Angelo

A-Z Information Jamaica Limited

Consultancy on

Opportunities for Doing Business between CARIFORUM States

And the

French Caribbean Outermost Regions (FCORs)

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LIST OF ACRONYMS AND ABBREVIATIONS

ACP	Africa, Caribbean, Pacific
ADEXMA	(Association des Exportateurs de la Martinique)
AMPI	(Association Martiniquaise pour la Promotion de l'Industrie)
ANU	Antigua & Barbuda
BSO	Business Support Organisation
CARICOM	Caribbean Community
CARIFORUM	Caribbean Forum of ACP States
Caribbean	Export Caribbean Export
CSME	CARICOM Single Market and Economy
DFQF	Duty-free, Quota-free
DOM	Overseas Departments
DR	Dominican Republic
EC	European Commission
ECDPM	European Centre for Development Policy Management
EDF	European Development Fund
EPA	Economic Partnership Agreement
EU	European Union
FCORs	French Caribbean Outermost Regions
GATS	General Agreement on Trade in Services
GATT	General Agreement on Tariffs and Trade
ICT	Information and Communication Technology
MPI	(Association des Petites et Moyennes Entreprises)
OECS	Organization of Eastern Caribbean States
RIP	Regional Indicative Programme
RSP	Regional Strategy Paper
SLU	St. Lucia
SME	Small and Medium Enterprise
SP	Sugar Protocol
SPS	Sanitary and Phytosanitary Measures
SVG	St. Vincent & The Grenadines
TBT	Technical Barriers to Trade
TF	Task Force
TOR	Terms of Reference
TRIMS	Trade-Related Investment Measures
TRIPS	Trade-Related Aspects of Intellectual Property Rights
T&T	Trinidad & Tobago
WTO	World Trade Organization

1.0 Executive Summary, Main Findings and Recommendations

1.1 Executive Summary

1.1.1 Objectives

The objectives of this study as outlined in the Terms of Reference are as follows:

- Examination of current trade activity in goods and services and trends between CARIFORUM Countries (CARIFORUM) and the French Caribbean Outermost Regions (FCORs);
- Identification of the business opportunities within key sectors for each market in light of the signature of the CARIFORUM-EU Economic Partnership Agreement (EPA);
- Identification of barriers affecting trade between markets and recommend policy mechanisms that can reduce or eliminate these barriers;
- Make recommendations to improve the regulatory framework and to remove the impediments to trade between these countries; (need to discuss this more and make more specific) – e.g. Regional Council need to come together to discuss the Octroi de Mer
- Identify the extent to which CARIFORUM goods and services could access the EU market through the territories of the FCOR.

1.1.2 Methodology

In order to achieve the above objectives, the Consultants were required to carry out secondary research as well as primary research during visits to nine (9) CARIFORUM countries and the three (FCORs)². The CARIFORUM countries visited by the Consultants, Noel Watson and Lucia Angelo of A-Z Information Jamaica Consultants, were:

- Antigua & Barbuda, Barbados, Dominica, Dominican Republic, Jamaica, St. Lucia, St. Vincent and The Grenadines, Suriname, and Trinidad & Tobago
- The three FCORs visited were: French Guiana, Guadeloupe and Martinique

² Only covered Martinique, Guadeloupe and French Guiana but St. Baart and St. Marten are now separate FCORs.

During the secondary research phase the Consultants examined data and information including:

- Previous studies that examined trade related issues within CARIFORUM and the FCORs and between CARIFORUM and the FCORs
- Studies relating to the Economic Partnership Agreement (EPA) between CARIFORUM and the EU
- National Development Plans and National Export Strategies of countries and Territories
- Websites of institutions and companies
- Data on commodities trade between CARIFORUM.

Prior to embarking on the field research, the Consultants prepared and submitted an Inception Report on October 29, 2009 which outlined the methodology, questionnaire design, work plan and timetable of activities. The Consultants then participated in an Inception Meeting with Caribbean Export on November 9, 2010 in which the Inception Report was discussed. The Inception Report was circulated to CARIFORUM/FCOR/OCT Task Force for Trade and Investment (hereafter referred to as The Task Force) Members for the feedback.

After the Inception Meeting, the Consultants prepared and submitted an Interim Report on January 10, 2010. This report presented secondary research findings and included:

- Review of previous studies
- Analysis of Exports and Imports between CARIFORUM and FCORs 2005-2008
- Spreadsheets containing export data
- Questionnaires designed to carry out data collection
- Revised timetable of activities

After a meeting with Caribbean Export to discuss the report, it was circulated to Task Force Members for their comments.

1.1.3 Country Field Visits

The Consultants visited all the countries mentioned above over the period January to April 2010 to execute the field visits (see timetable of activities in Appendix 2. Before making country visits, a Focal Point recommended by Caribbean Export or the CSME Unit was contacted (a list was obtained from the CSME Unit) and asked to set up meetings and Focus Groups with critical target groups. In each case the Consultants sent an Indicative Schedule to the Focal Point to use as a template to set up the activities during the two or

three day field visit. In most cases the field visits were arranged more or less to plan even though in a couple of cases the Consultants had to make significant parts of the arrangements while in the field. The Focal Points were also asked to distribute the questionnaires to exporters, potential exporters and BSOs. This was done with limited success in that the Consultants were aiming for 30 completed questionnaires in each country but fell short of this because of a low response rate.

During the field visits, questions relating to the objectives of this study were asked to one-on-one interviewees and participants in the Focus Group discussions. Their responses were recorded and/or their completed questionnaires collected. The Focus Group discussions with exporters and BSOs were typically very informative and provided a broad cross section of views. Participants typically spoke fluently about the (perceived) barriers to entry and a little less fluently about opportunities. They also provided many recommendations for the consideration of their domestic Government, Regional Government Agencies, and Caribbean Export.³

Most participants in the meetings had limited awareness of the EPA and of the level of existing trade that takes place between CARIFORUM and the FCORs. In general it was found that persons in CARIFORUM were much more involved or familiar with trade with the rest of CARICOM, the USA or the UK. The FCORs did not typically enter their frames of reference. Similarly, in the FCORs the focus was more on the historical trading relationship with Mainland France.

The Consultants took the opportunity to inform participants about the opportunities, how to deal with barriers, and the EPA. The Focus Groups also provided opportunities for persons to network amongst each other. In some cases Focus Group participants lamented the fact that such meetings did not take place more regularly so they could be made more aware of opportunities and could learn from each other's experiences.

The main challenge with the field visits was that of getting Member States and Territories to agree on dates for the visits of the Consultants because they often had other national or regional priorities to address and/or critical persons were overseas, etc. This often resulted in lengthy postponements of visits.

After the field work, the Consultants faced the arduous task of collating information, analyzing data, following up with persons who promised information, reviewing new secondary information, and writing the Final Draft Report.

³ These are outlined in detail in the Country Reports contained in Volume 2 of this report.

1.2 Main Findings

Given the scope and coverage of this study, there were numerous findings which can be read in detail from the Individual Country Reports in Volume 2 of this Draft Report. In this section the main findings will be outlined. Where possible information will be grouped and presented in a tabular form to facilitate cross country comparisons. The main categories of findings include:

- Findings related to socioeconomic features of CARIFORUM Countries and FCORs
- Findings related to the ease of doing business in CARIFORUM and the FCORs based on World Bank Rankings
- Findings related to transportation options (for people and freight) between CARIFORUM and the FCORs
- Findings related to exports of commodities
- Findings related to exports of services
- Findings related to Barriers to trade
- Findings related to Government policy or other support
- Findings related to Caribbean Export Support

1.2.1 Findings related to socioeconomic features of CARIFORUM Countries and FCORs

- Using per capital income as a measure of economic well-being, it was found that the per capital income of the FCORs in 2008 ranged from US\$15,955 in French Guiana to US\$24,120 in Martinique while those of CARIFORUM ranged from US\$1,509.13 in Guyana to US\$19,870 in Trinidad & Tobago. This reflects the fact that the FCORs are part of France and are effectively part of a developed country whereas CARIFORUM countries are still categorized as developing countries.
- Using the UNDP Human Development Index (HDI) for 2009 as a measure of overall socioeconomic well-being, France (representing the FCORs) ranks 8th in the World with a "Very High" HDI. Barbados is top amongst CARIFORUM and ranks 37th in the World - is the only CARIFORUM country with a "Very High" HDI. This once again shows the difference in the overall socioeconomic ratings of the FCORs relative to the CARIFORUM countries.
- These differences in socioeconomic status should form the basis for mutually beneficial trading relationships if the differences in cost, knowledge and expertise in key areas are skilfully exploited.

1.2.2 Findings related to the ease of doing business in CARIFORUM and the FCORs based on World Bank Rankings

The World Bank's "Ease of Doing Business" survey (2009) revealed that France/FCORs (31st) ranks above all CARIFORUM countries in terms of ease of doing business. The Ease of doing business is based on a set of criteria outlined in Chapter 9 of this report.

St. Lucia (36th) ranked highest amongst CARIFORUM countries.

On the whole, there is scope for both CARIFORUM countries and France/FCORs to examine their regulations to see if they are unnecessarily restrictive thus acting as a deterrent to trade. It would be counterproductive and counterintuitive to enter into agreements with the objective of facilitating increased trade when the regulations (in the parties to the agreement) unnecessarily impede trade.

1.2.3 Findings related to transportation options (for people and freight) between CARIFORUM and the FCORs

One of the main concerns expressed by persons across CARIFORUM and the FCORs was the inadequacy of transportation to move people and freight between CARIFORUM and the FCORs. Despite there being room for more transportation options, there are air options that allow persons to move from any CARIFORUM to the FCORs in one day. There are also shipping (including ferry) options that allow cargo to be moved within CARIFORUM and between CARIFORUM and the FCORs. This is shown clearly in a later section in this report that deals with transportation options.

It means that though there is scope for improvement, the availability of transportation may be less of a barrier to trade than many think. (See Chapter 8 for more details).

1.2.4 Findings related to the export of goods

CARIFORUM

Even though many persons to whom we spoke in CARIFORUM had not considered the FCORs as a market for doing business (persons were typically less familiar with the FCORs as we moved geographically further away from

them), there are exports in all categories of goods from CARIFORUM to the FCORs. In addition there are commodity exports from each of the CARIFORUM countries to at least one of the FCORs.

In value terms, CARIFORUM goods exports to all three FCORs are dominated by mineral based products (petroleum and gas), metals and chemicals that are exported from Trinidad & Tobago. Minerals exports account for over 90% of the value of all CARIFORUM exports to the FCORs.

Apart from these mineral exports which are dominated by large multinational companies and may not be open to SMEs, the greatest export opportunities for CARIFORUM are to be found in agricultural and seafood products; agro-processing (sauces, spices, condiments, jams, jellies, etc); food stuffs (food preparations, mineral waters, beers, aerated waters, etc); and paper and paperboard products. **(See Chapters 4 and 5 and Individual Country Reports for more details)**

Dominica and Jamaica export significant amounts of agricultural and seafood products to Guadeloupe and Martinique. Barbados exports a variety of goods to all three French Caribbean territories. Its highest value in the export of goods is paper and paperboard labels sent to all three territories but earning the most from Guadeloupe and Martinique. Paper and paperboard labels is followed by liqueurs and cordials (sent to Guadeloupe only) and perfumes and toilet waters (excl. aftershave lotions, personal deodorants and hair lotions) sent to all three FCOR territories. Suriname and Guyana export large amounts of rice to all three FCORs. Trinidad & Tobago exports a wide variety of products to the FCORs with the main product being minerals). The details of commodity exports can be viewed in the Individual Country Reports where data are provided at the HS 6-digit level for all CARIFORUM countries.

FRENCH CARIBBEAN OUTERMOST REGIONS

The FCORs trade almost exclusively with continental France and to a lesser extent with the rest of the EU, while doing little business with the Caribbean (main FCOR clients being St Lucia, Trinidad & Tobago, the Dominican Republic). Moreover, even though this small amount of regional trade takes place in virtually all product categories, it is largely dominated by mineral based products (in 2006, over 90% of total FCORs exports accounted for refined oil, and mostly from Martinique).

From 2007 onward, overall exports of goods from the FCORs to CARIFORUM have experienced a drastic decline from \$100,017,659 in 2006 to \$16,218,092 in 2008, the most significant drop occurring in products derived

from oil and minerals; and to a lesser extent in the electrical machinery, metals and transportation sectors.

Over the same period, the structure of trade itself varied significantly: in terms of mineral product share (from over 90% in 2006 down to 51% in 2008) and as Guadeloupe and French Guiana have been increasing trade relative to Martinique, the largest FCOR exporter to CARIFORUM to-date. The major slowdown in Martinique (mineral-based product) exports has been partially offset by significant increases in Guadeloupe exports in electrical machinery and metals.

The top five categories of products exported from the FCORs to CARIFORUM over the 2006-2008 period are: mineral products, machinery electrical, transportation, metals, chemicals & allied industries.

Comparing CARIFORUM and FCORs top five (5) exports, we observe some intra-industrial trade taking place in Mineral products, Chemicals and Allied Industries and Metals. There may thus be some comparative advantage for the FCORs in products such as electrical machinery and transportation.

1.2.5 Findings related to exports of services

With respect to services, there is no quantitative data with respect to trade between CARIFORUM and the FCORS. However, there is evidence of services exports taking place such as:

- Transportation services - LIAT, Air Caraïbes and small regional shipping entities transport persons between CARIFORUM and the FCORs. Traditional tourism – visitors from the FCORs and mainland France visit Dominica to enjoy its nature based tourism; visitors from Martinique travel to St. Lucia for shopping and visiting family (there is a St. Lucian Diaspora in Martinique; visitors from French Guiana to Suriname travel by land and water for entertainment and shopping. Persons from French Guiana also travel to Suriname to take advantage of lower cost international flights out of Paramaribo.

Data available in the FCORs do not allow us to distinguish accurately enough between incoming CARIFORUM visits due to tourism or business purpose. CARIFORUM visitors usually come from: Saint-Lucia, the Dominican Republic, Barbados, Haiti and to a lesser extent Antigua & Barbuda, Saint Vincent and the Grenadines, Trinidad & Tobago.

- Cultural Industries – persons from Martinique and Guadeloupe participate in the St. Lucia jazz festival, carnivals, community entertainment (Gros Islet). There is scope for much greater trade in cultural industries including music - for example it is argued that persons from the FCORs are likely to prefer original copies of music as opposed to “boot legged” copies often seen for sale in other CARIFORUM countries. Persons from the FCORs also visit carnivals and festivals in Antigua & Barbuda, Barbados, Dominica, Trinidad & Tobago and Suriname.
- Education tourism - student exchange programmes take place between Barbados, Antigua & Barbuda, and Trinidad & Tobago and the FCORs. There is also scope for customer service training (offered to the FCORS) and English Language Training (ELT). In addition, several of the CARIFORUM countries have overseas-based universities offering medical and a variety of other training.
- Based on the findings of this study it is felt that there are opportunities in ICT, multi-destination tourism, sports tourism, and business development services.
- Services related to the environment and the production of renewable energy are also seen as areas of great opportunity – for example Martinique and Guadeloupe have expertise that could assist the CARIFORUM energy and waste treatment sector to reduce energy costs and be more self-sufficient. St. Kitts and Nevis is about to undertake a Geothermal project in Nevis through which the country ultimately hopes to export energy. A similar project is being developed in Dominica with a view to export to Guadeloupe and Martinique.

Restrictions to services trade based on France’s EPA Commitments:

The main restrictions are in the form of registration, licensing and qualification requirements. In terms of Investment/establishment there is often a maximum percentage of shareholding or voting rights. In addition, for managerial positions, a CARIFORUM company establishing in the FCORs, has to verify that there are no nationals qualified to fill such positions before a CARIFORUM person can legally fill such a position. In a few cases there are nationality requirements which restrict the activity to being performed only by a French national unless special authorisation is granted.

CARIFORUM services exporters are advised to examine the restrictions carefully as it relates to their industry and familiarize themselves with the French regulatory requirements before venturing into the FCORS. (See Chapter 6 and Individual Country Reports for more details).

Restrictions to services trade related to immigration issues

Current immigration procedural requirements adversely affect the movement of many persons from CARIFORUM wishing to enter the FCORs. The Caribbean business community has usually faced greater difficulties accessing the FCORs (compared to mainland France, which is part of the Schengen area).

Since December 2009, Seven (7) Caribbean countries⁴ have been granted a short-period visa waiver (up to 90 days) to the FCORs. However, individuals from CARICOM still complain that they have problems entering Martinique even when they have a visa or where there are no visa requirements: a letter of invitation and proof of accommodation (effective payment) are still required.

Restrictions to services trade for FCOR exporters

In certain areas such as legal services, accounting, auditing or the kind, FCOR exporters can also encounter restrictions regarding qualifications requirements. Mutual recognition agreements and rules harmonization are strongly required in other areas such as engineering, medicine, etc. A multilateral adoption of the metric system for example would alleviate barriers in various industries (architecture, etc.).

1.2.6 Findings related to Barriers to trade

Numerous barriers to trade were identified across CARIFORUM and the FCORs, the main ones included:

- language problems both spoken and written
- Inadequate transport – lack of availability and cost of service
- Challenges in meeting French/EU standards – both quality and documentation requirements
- Lack of knowledge of the French system (tax structure, market structure, etc.), and
- Lack of on the ground representative/distributor. **(See Chapter 7 and Individual Country Reports for more details)**

⁴ Visa waiver granted **for all three FCORs**: Antigua & Barbuda, Bahamas, Barbados St Kitts and Nevis
Visa waiver granted **only for Martinique and Guadeloupe**: Grenada, St Vincent and the Grenadines, Trinidad and Tobago

1.3 Recommendations⁵

1.3.1 Recommendations related to Government policy or other support

Numerous recommendations concerning required Government policies and support activities were given by participants in interviews and Focus Group discussions in CARIFORUM and the FCORs. These included:

- Strategies to improve transportation options – such as arranging loans or guarantees to promote private sector investment in the required air and sea transportation. This would include strategies to encourage more efficient use of existing transportation (through consolidation) as well as provide new options to ship volumes smaller than container loads (such as shipping palettes).
- Development of language training related strategies and a language policy to support trade – such as better utilising the resources of the Alliance Française.
- Creating an improved enabling environment for agriculture and utilization of strategic agricultural production approaches based on demand and supply
- Increased capacity of national Bureaux of Standards and testing facilities to meet EU/French standards and other SPS requirements such as those act as barriers to some French Guiana products accessing the Suriname market (e.g. dairy products and soft drinks)
- Organizing Trade Missions to the FCORs and from the FCORs to CARIFORUM
- Providing appropriate incentives to SMEs and selecting and nurturing successful SMEs exporters. Incentives could include tax breaks, more specially tailored lending facilities, special grants, promotion of SME products and identification of markets, rewards for SMEs that successfully penetrate (new) markets in the FCORs, etc. Any incentives provided to SMEs should of necessity be consistent with WTO rules.
- Promotion of successful business models for distribution, meeting EU requirements, etc
- Facilitation of local collaboration in order to develop critical mass and benefit from economies of scale and scope especially as it relates to transportation costs, distribution costs, production costs, marketing costs, knowledge sharing, etc.
- Development of sports tourism opportunities by promoting sporting activities/events that take place in both the FCORs and CARIFORUM thereby increasing participation in sporting events as well as the number of spectators.

⁵ There are more recommendations in each of the Individual Country Reports contained in Volume 2 of this report.

- Establishment of enhanced Regional Disaster Management Programmes – incorporating technologies available in the FCORs
- Initiatives to exploit competitive advantages in Cultural Industries – policies to encourage the production of more local music, festivals and productions, designs and intellectual property related issues (activities are already taking place in the area).
- Designing initiatives to stimulate co-operation between Universities of CARIFORUM and those in FCORs
- Working with FCOR counterparts to establish a public-private multilingual T.V. Channel available to Caribbean viewers all over the Region so they can learn more about other countries, learn more about doing business in other countries, engage in language training, and for exporters to promote their products.
- Establishment of a BSO in FCORs to assist CARIFORUM and FCOR exporters –this is considered very important because (potential) exporters to the FCORs are likely to require an initial point of contact which provides, inter alia, support in finding distributors, finding joint venture partners, meeting EU/French standards, completion of French/EU documentation, networking, dealing with cultural and language differences, cost effective promotional strategies, etc. A BSO in the FCORs which is staffed by a combination of personnel from CARIFORUM and the FCORs would serve a very useful purpose in increasing trade between CARIFORUM and the FCORs. *The BSO should also provide* of an information portal on opportunities in FCORs/CARIFORUM
- Establishment of a (Regional) Business Development fund especially to support FCOR investors/exporters who require guarantees to obtain loans to access the CARIFORUM market.
- Assessment of the impact of VAT and other domestic taxes on exporters
- Provide appropriate initiatives where necessary to encourage the conversion of banana lands to produce other export crops
- Strengthening of the Coalition of Services Industries by providing necessary equipment, staffing and training in order to support the export of services especially from SMEs

1.3.2 Recommendations relating to Caribbean Export Support

Caribbean Export was generally seen as a strong Regional institution and was most recognised because of its Direct Assistance Scheme. Given its Regional perspective, certain recommendations were made on how Caribbean Export could be more effective in assisting exporters penetrate the FCORs and other markets. These included:

- 1 Develop initiatives that increase awareness of regional transportation options between FCOR and CARIFORUM – the Consultants found that business persons in the member states visited were not fully aware of existing transportation options.
- 2 Coordinate the relevant agencies and Regional Governments to facilitate cross advertising of products and services and distribution support in CARIFORUM and the FCORs. Coordinate initiatives with Regional Governments to place a business representative and a cultural attaché on the ground in the FCORs with the responsibility for providing marketing and other support - a recurrent theme found during the field visits was that a critical success factor is having a distributor or a representative on the ground in the FCORs. Companies that have been successful in exporting mentioned this as perhaps the most important ingredient to success while companies that were not exporting identified this as a main reason for not doing so. As mentioned earlier, it was felt that someone or a BSO was needed in the FCOR (could be through a Mission e.g. St. Lucia's Consulate or the Regional Council) that would be the first point of contact for those wishing to penetrate the FCOR market - this person(s) would either act as distributor or link potential exporters with distributors. The person would also provide relevant information on standards, regulations, transportation options, etc.
- 3 Assist small producers, such as agro-processors, to find niche markets because they would not have the capacity to supply major distributors and supermarket chains. This would include looking at the possibility of regional industries being marketed under a Caribbean brand e.g. Caribbean Island Sauces under which would fall pepper sauces from all countries under the ambit of Caribbean Export.
- 4 Collaborate with Governments and BSOs to provide effective Trade Missions. Various SMEs have benefitted from Trade Missions in the past – fashion designer, craft producers and condiment producers.
- 5 Caribbean Export should work with Regional Governments to access EPA funds to support interventions in the FCORs.
- 6 Encourage and facilitate Joint Ventures as an approach that can be taken by SMEs to do business in the FCORS.
- 7 Fostering of information sharing - this would include a section on the Caribbean Export website or a separate website that provides information on exporters, distributors, doing business in the FCORs and CARIFORUM. It would also allow exporters to provide their own

feedback and information on experiences and opportunities and would foster (online) networking across the region.

- 8 Developing linkages by specifically bringing key groups together and providing advocacy - specifically, Caribbean Export should bring together
 - Government Officials to deal with certain issues such as providing better regional transportation e.g. advocating that Governments share the cost of providing appropriate transportation (e.g. small vessels) to move people and goods by sea or air;
 - Government and Private sector representatives to deal with the issue of providing Government guaranteed loans for the private sector to obtain and operate appropriate transportation services;
 - Private sector representatives to
 - firstly, share ideas and experiences - there are quite a few fears out there that could be easily dispelled through dialogue with those who have successfully traded or done business;
 - secondly coordinate activities e.g. finding ways to get goods from CARIFORUM countries to FCORS (at the right time, place and quality) in the appropriate quantities to share containers and export to mainland France and the rest of the EU via the FCORs; and
 - thirdly, carry out focussed Trade Missions where preliminary research has been done and the mission is targeted at making deals and starting the export process.
- 9 Providing capacity building initiatives to facilitate the meeting of EU standards - there is a feeling amongst many CARIFORUM producers that EU standards are very stringent or too hard to meet – Caribbean Export could work with regional exporters/producers/BSOs, Bureaux of Standards to outline exactly what are EU standards and provide technical support on how these standards should be met - including linking up CARIFORUM producers with operators in the FCORs who know about standards (and vice versa).
- 10 Promotion and facilitation of training and development in language and culture - the differences in language and culture between the FCORs and CARIFORUM cannot be ignored but could be as much an opportunity as a barrier. Resources are required to provide language and cultural training especially as it relates to doing business - these resources could be used to strengthen existing institutions (staffing, curriculum development, etc) as well as to promote the programmes to (potential) exporters.
- 11 Work with Governments to foster sports tourism where there is more inter-jurisdictional participation and spectatorship as well as to promote

a Caribbean wide product based on the number of stars emanating from the region e.g. sprinters, footballers, cricketers, basket players, etc.

The same concept should also be used for cultural tourism where greater intra-regional participation in festivals, carnivals, theatre should be promoted and a Caribbean brand could be created under which would fall all our various artistes, performers, actors, etc.

- 12 Recommend to Regional Governments to negotiate cheaper airfares (for the whole region) to stimulate more cargo and services trade.
- 13 Assist in outlining productivity and other benchmarks necessary if CARIFORUM is going to face and compete with others through the EPA. A study should be conducted which compares prices, wages, rates between the FCORs and CARIFORUM.

Caribbean Export has a very important role to play in increasing business activity between CARIFORUM and the FCORs; the closer the Agency can get (or at least its interventions) to the actual exporters themselves the more successful it is likely to be.

Final Recommendation

The Consultants recommend that a few of the identified industries be targeted initially and strong efforts be made to stimulate more export activity, build customer loyalty, and register success cases in these industries rather than attempt a broad-based onslaught on the destination markets (whether FCOR or CARIFORUM) and spread the effort too thin.

In selecting the priority industries the following factors should be considered:

- The mandate of Caribbean Export
- The demand for the products in the destination market based on trends in exports
- The capacity of the relevant exporters to meet potential demand in a cost competitive manner while meeting EU quality standards
- The restrictions/regulatory requirements outlined in the various EPA commitments
- The extent to which the barriers to entry identified can be easily dealt with.
- The competitive edge that can be gained by industries in both the FCORs and CARIFORUM through increased trade – in terms of expertise in the FCORs, knowledge of EU standards in the FCORs, lower costs in

CARIFORUM, knowledge of the tourism sector and customer service in CARIFORUM.

This study has attempted to address all of the above factors.

The Task Force/Caribbean Export should be guided by the priorities outlined in Sections 4.3, 5.3, and 6.1.

2.0 Background

The CARIFORUM-EU Economic Partnership Agreement (EPA) signed in October 2008 offers a new deal to the CARIFORUM states in terms of a new WTO-compatible trading relationship with the EU based on reciprocity. It is also the case that the French Caribbean Outermost Regions, as part of the EU, are thus directly affected by the regional opening of trade and the consequent economic development objectives. What now remains to be done by both parties is to optimize the implementation process of the EPA to foster regional integration and development through increased trade and investment, business development, partnerships, cooperation and all the required related adjustments. The first step in this process is to provide a full understanding and knowledge of the challenges and opportunities at stake, for private and public sector operators, therefore the need for this comprehensive study planned by the Caribbean Export Development Agency.

2.1 Background on CARIFORUM

The CARIFORUM group, which comprises 14 CARICOM countries and the Dominican Republic, is not a very homogenous bloc, instead it presents asymmetries and diversity at different levels (sizes, languages, history, etc).⁶ However, CARICOM countries have been involved in a long standing regional integration process since 1973 -more actively since the 1990s with the creation of a Single Market and Economy (CSME). However, intra-CARICOM trade is relatively small despite some growth over the past fifteen years (current estimates are about 14% of total members' trade, against 11% in 1993).⁷ Trinidad & Tobago is responsible for a significant amount of this expansion as its exports account for over two-thirds of intra-regional exports (due mainly to its oil-related production, food processing and light manufacturing).

In other words, most CARICOM countries export mainly to external markets and depend little on intra-regional trade. It appears nonetheless that a deeper regional integration process is being pursued not so much with the final objective of increasing intra-regional trade but rather with the purpose of stimulating cooperation and synergies between private operators and regional

⁶ CARIFORUM States are Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Jamaica, St. Christopher and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname and Trinidad and Tobago

⁷ It should be noted that for some of the smaller CARICOM economies such as Barbados, regional trade is much greater as a percentage of their total trade but because of their relatively small size this is not significantly reflected in the regional ratios.

institutions to facilitate better use of resources and greater competitiveness on the global market. This is one of the objectives being pursued by CARIFORUM through the EPA.

Another objective behind the signing of the EPA is to initiate a WTO-compatible trade relationship (based on reciprocity) with the European Union, while avoiding the General System of Preferences (GSP). As a matter of fact, the CARICOM secretariat has identified a list of Caribbean 'EU Generalized System of Preferences-sensitive' goods currently exported to the EU, a list of products that would face a significant tariff increase under the GSP.

Overall, the general ACP-EU trade tendencies are also observed in CARIFORUM-EU trade in that these consist of a very limited variety of products (mainly raw materials and agricultural goods), despite fairly significant amounts - over 6 billion Euros in 2007.

Regarding trade in services, this is still not a key element of intra-regional trade in CARICOM and the complete removal of restrictions on trade in services remains a CSME agenda item. At the moment, CARIFORUM countries export most of their tourism and financial services to larger external markets.

By signing the EPA, CARIFORUM countries undertake to make major strides requiring progressive adjustments in terms of investments and business development, partnerships and cooperation. The CARIFORUM-EC Regional Preparatory Task Force (RPTF) is an institution established to translate the needs for support identified in the course of the negotiations into operational ideas for trade related and other development assistance and work out these ideas up to the level of pre-identification of fundable actions. The RPTF has commissioned several studies on relevant issues including agriculture, trade facilitation and investment, e-Commerce and SMEs, social and labour market aspects, and personal data protection. CARIFORUM has also prepared an EPA Implementation Road Map stipulating a schedule and plan of action to guide member States on the legislative and policy actions required at a national and regional level; a timetable for the accomplishment of each of the identified actions; and the estimated volume of resources required for EPA implementation and the possible sources of funding, including those already committed by the EU.

Furthermore, as far as the tertiary sector is concerned, several CARIFORUM countries already identify needs in services related to the environment, tourism, ICT, auditing, maintenance, health, etc.

2.2 Background on French Caribbean Outermost Regions

The French Caribbean Outermost Regions are located in the Caribbean Basin while they belong to France, thus to the European Union outermost regions. Such a combination implies a peculiar political, economic and social situation compared to their closest neighbours. They are indeed fully covered by the EPA commitments, as part of the EU, and their specific position and interests have been outlined throughout the negotiations and special provisions within the Agreement signed in October 2008.

Although the three FCOR markets usually appear relatively wealthy compared to their Caribbean counterparts, they remain very small compared to a CARIFORUM neighbour like the Dominican Republic (combined FCORs' GDP is less than 80% of DR's GDP⁸ and their combined population is only one million compared to over 9 million in the Dominican Republic).

For the purpose of this study it seems convenient to follow the traditional distinction made between the islands of Martinique and Guadeloupe, on one hand, and French Guiana on the other, the latter being located on the South-American continent.

As far as Guadeloupe and Martinique are concerned, the latest INSEE trade data indicate a trade deficit fluctuating around 2 billion Euros with a significant peak in 2008⁹, the two islands registering similar figures for 2008 (€2.4 bn) and 2009 (€1.8 bn)¹⁰.

For both Guadeloupe and Martinique trade takes place almost exclusively with continental France (on average 57% of total imports, mostly consumer products, and approximately 33% of total exports), and to a lesser extent with the rest of the EU. This narrow participation in world trade reflects little economic integration into the Caribbean region. For example, in 2009 Guadeloupe and Martinique exported under 5% of their total exports to the Greater Caribbean Basin (including the United States) and imported less than 15% of their total imports from this region. Both such exports and imports mainly take place with the United States (including Puerto Rico and the U.S. Virgin Islands), Dominican Republic and Aruba. This geographical

⁸ However, FCORs combined GDP amounts to over 50% of combined 15 CARICOM economies!

⁹ Due to an increase in oil imports value, which recorded a 4-fold increase over the last 10 years, and to a lesser extent to an increase in manufactured imports. Source: INSEE / French Customs Authorities, Statistical Division, 2010.

¹⁰ These figures include trade with mainland France. Source: INSEE, « Année économique et sociale » Guadeloupe / Martinique, 2008, 2009,

concentration is largely due to a lack of diversity in the goods exchanged: refined oil (which accounts for over 75% of FCOR imports from the Caribbean), construction materials, industrial machinery¹¹.

As far as trade in services is concerned, relatively few studies have been conducted however they typically reveal a similar trend despite an increasingly dynamic internal market. In Martinique, non-banking services have shown a 20% increase (from 2004 to 2006) mainly in small businesses dedicated to leisure, culture or sport-related services. Guadeloupe reflects a similar picture. In both islands, a significant improvement is also observed in educational, health and social services. Transportation services are worthy of special attention because they reflect the general orientation of the FCORs towards France: most flight and sea-carriage is either from or towards continental France or the other FCORs. Guadeloupe nevertheless is increasingly used as a hub to/from the rest of the Caribbean.

As mentioned earlier, French Guiana is the only FCOR located on the American continent and shares land-borders with a CARIFORUM country (Suriname).

What may characterize French Guiana's economic situation is its dependence on mining and agricultural activities and the construction sector. The economy is usually stimulated by new public infrastructure and construction projects. French Guiana's unemployment rate has been fluctuating and reached higher levels than in the other FCORs (27.6% in 2006, 20.6% in 2007 and 21.8% in 2008¹²).

Fishing, rice culture, cattle, lumber, gold, tourism and the aerospace industry are the main industries in French Guiana. However, despite its location on the continent, its structure of trade shows a similar structural trade deficit and dependence on trade with continental France as is the case for the other FCORs¹³. In 2009, French Guiana registered imports of 993 million Euros (most of which was accounted for by the oil sector and the car industry) compared to exports of 115 million Euros. Raw gold traditionally accounts for a significant share of total exports but has declined dramatically in recent years (approximately 50% of total 2007 exports down to 37% in 2009).¹⁴ Nonetheless, similarly to the other two FCORs, French Guiana presents great potential in the tertiary sector.

¹¹ Source: INSEE, TER 2010.

¹² Source: INSEE TER 2010, according to International Labour Office standards

¹³ Please note however that in 2009, French Guiana reduced its imports from France, which accounted for 35% of total 2009 imports.

¹⁴ Source: INSEE, TER 2008, 2009-2010. French Guianese gold exports have registered a significant drop over the last few years, from 9 tons in 2002 down to 2,1 tons in 2008

Overall, despite some challenges inherent in the EPA, the FCORs foresee the Agreement as an opportunity for greater regional integration, business development and greater synergies when trading with the EU and other external markets.

2.3 Background on the Economic Partnership Agreement

Since the Lomé Agreement in 1975, CARIFORUM goods benefitted from non-reciprocal preferential access to the EU market, which is not compatible with WTO principles (some CARIFORUM goods had free access to the EU market while the CARICOM common external tariff reached rates up to 45%).

The EPA signed is not only based on reciprocal trade between the EU and CARIFORUM states but was also designed to foster growth, employment and development in the Caribbean. A particular aspect of this agreement is that it entails liberalization in goods and services under specific principles and conditions such as sustainable development, regional integration and development cooperation.

Some specific aspects of the EPA are that it removes barriers to most Caribbean exports in goods and services to the EU (exceptions made for sugar and rice for now) and includes improved 'rules of origin' allowing for intermediate products from outside the region.

The EPA also offers a brand new deal on Caribbean imports from the EU. EU products are to become increasingly more accessible to Caribbean consumers, following a tariff-elimination process over 25 years..

Besides its new trade-related obligations, the EU is also committed to providing the CARIFORUM states with funding under the Aid for Trade financial programme, in addition to the 165 million Euros 10th EDF program.

As indicated in the previous sections, the FCORs are fully covered by the EU commitments under the EPA but benefit nonetheless from special provisions taking into account their specific interests and position in the region. At the moment, their local markets are still excluded from the liberalisation of bananas and sugar originating from CARIFORUM and still benefit from specific fiscal instruments (such as the 'octroi de mer'). Other specific provisions favour the FCORs economies, such as those related to commitments in terms of sustainable management of agriculture and fisheries resources, social rights and environmental protection. The safeguard clauses also provide specific arrangements for the FCORs allowing them to benefit from similar conditions

to those prevailing for the CARIFORUM (which are more favourable compared to those applying for EU member states)¹⁵.

It should be noted that Article 239 of the EPA addresses the issue of EC Outermost Regions and states specifically that "Taking account of the geographical proximity of the outermost regions of the European Community and the CARIFORUM States and in order to reinforce economic and social links between these regions and the CARIFORUM States, the Parties shall endeavour to specifically facilitate cooperation in all areas covered by the present Agreement as well as facilitate trade in goods and services, promote investment and encourage transport and communication links between the outermost regions and the CARIFORUM States."

¹⁵ See Article 25 (paragraphs 4,6,8) of the Agreement.

3.0 Findings from other relevant studies

Up to now, several studies have been carried out on trade and regional integration within the Caribbean region. Only a few focus on the benefits that may stem from greater trade and integration between the FCORs and their Caribbean neighbours. The Consultants aimed to build on previous works [see list under Appendix IV], in order to facilitate the identification of the sectors offering greatest export opportunities.

It seems appropriate to refer to a few relevant studies carried out on trade opportunities between the FCORs and the CARIFORUM in the context of the CARIFORUM-EU EPA.

Prior to the signing of the EPA, a series of studies were conducted for the Regional Council of Martinique by **Victor E. Vaugirard** (VEV) (2007) on the movement of capitals and trade in goods and services. VEV highlighted different kinds of technical barriers to trade and investment in the region and enunciated some recommendations to improve the negotiation and implementation process of the EPA.

Other studies of the kind conducted in 2008 by **Lydia Barfleur** and in 2009 by **Angelo, Lesales and Salmon** identified opportunities for Martinique and Guadeloupe deriving from trade facilitation in goods and services, in terms of exchange and other economic spillovers, in those sectors in which CARIFORUM counterparts show specific needs or capacities for joint-venturing.

The above-mentioned studies emphasize the need to take into account the FCORs comparative advantage in services and high-value added products both for the Caribbean and world markets.

Table 3.1 Opportunity sectors and partner countries

Sectors identified as opportunities	Partner countries
Environmental services, cultural services, ICT, sea transportation, health & wellness, management-consulting and engineering	CARIFORUM
Renewable energies, management-	OECS (Dominica, Grenada, St Lucia, St

Sectors identified as opportunities	Partner countries
consulting, architecture and engineering, R&D, health, hotel and restaurant services, education and professional training, entertainment (related services), maintenance and repairs, ICT	Vincent) – mainly due to geographical proximity and Haiti – mainly due to cultural proximity
Trade, retail services, health & wellness, management-consulting and engineering, education, R&D, tourism, entertainment, maintenance and repairs, ICT, architecture, transportation	Trinidad & Tobago - Mainly due to T&T purchasing power
All services listed above	Dominican Republic - mainly due to great potential for development and proximity to the USA.

As far as CARIFORUM countries are concerned, numerous studies on trade opportunities under the EPA have been carried out, but only a few on trade with the FCORs. Studies worthy of mention include works conducted by **Dr. Keith Nurse** (with a special focus on creative industries) and **Larry Placide**, inter alia, on EPA and the Services Sector – Opportunities and Challenges for Trade and Investment between CARIFORUM AND FCORs.

Although not directly related to the EPA, other relevant studies on trading relationships between the FCORs and their Caribbean neighbours worth mentioning include **Kinvi Logossah's** (2008)¹⁶ analysis of production and trade patterns in CARICOM and the three (3) FCORs, which stated not too surprisingly that the major obstacles to trade between these economies stemmed from similar production patterns (essentially primary and traditional products), historical and institutional drawbacks (language, post-colonial societal 'ranking', close relationships with former metropolis, etc) and comparatively higher production costs in the FCORs. He nonetheless identifies a few possibilities for the FCORs to increase trade in commodities with the rest of the Caribbean.

¹⁶ Kinvi Logossah is Professor in Economics at the CEREGMIA (Université des Antilles et de la Guyane) and Director of the Francophone Management Institute for the Caribbean (IFG CAR), in Haiti.

In terms of services, because of the similarity in production patterns, Logossah claims that differentiation might be a way to increase intra-regional trade (for example, different Caribbean countries could focus on different aspects of tourism: eco-tourism, cultural tourism, sports and leisure, wellness, etc).

It was also particularly relevant to take into account the studies and subsequent strategies elaborated on a national or regional basis by the CARIFORUM countries under study and the FCORs, either for the purpose of local development strategies or within a European development scheme.

The **FCORs regional authorities** have been conducting extensive studies and public consultations with a view to define regional development strategies¹⁷. Key findings and strategies are summarized in the *Schéma Régional de Développement Economique* (SRDE) for Guadeloupe and French Guyana and in the *Schéma Martiniquais de Développement Economique* (SMDE) for Martinique.

These studies completed others carried out under the French Ministry for the Outermost regions (SEOM). All identify the FCORs potential in terms of economic development and therefore present development strategies serving as backbones to EU-funded programmes -among which is the Regional Innovation Strategy (SRI). Key opportunity sectors (listed below in 3.2 table) encompass traditional and innovating activities: tourism, agro-production, fishing and aquaculture, ICT, renewable energy, environmental services and natural-risk management...

The **Caribbean Regional Indicative Programme** along with CARIFORUM Country Strategy Papers and National Indicative Programmes under the European Development Fund Programmes deserve a similar approach.

It is also worth mentioning some specific studies on services conducted for some of the **CARIFORUM** countries (Countries Strategic Marketing Plans for professional services).

As far as the **Dominican Republic** is concerned, the findings and strategies identified under the ISPRI Programme led to the elaboration of the national

¹⁷ Relevant documents on innovation and development in Guadeloupe:

- PO 2007-2013 (<http://www.guadeloupe.pref.gouv.fr>)
- SRDE (<http://www.srde-guadeloupe.fr>)
- Inventaire des indicateurs de la recherche en Guadeloupe;
- Livre blanc de la recherche : état des lieux de la recherche en Guadeloupe ;

plan for the implementation of the EPA (PNI EPA CARIFORO-UE), which was adopted earlier this year (February 2010).

Key sectors identified in the above-mentioned studies are listed in Annex IV (c). Policy recommendations and major findings captured from such studies are taken into account later in this report.

Key sectors and trade opportunities identified during previous Task Force meetings were also taken into account in the present study.

4.0 Analysis of Exports from CARIFORUM to FCORs 2006-2008

In this section of the report, there is an analysis of exports from CARIFORUM to the FCORs. This section focuses mainly on trade in goods because the CARICOM Secretariat and other agencies which provided the trade data do not have access to detailed trade in services data. Qualitative information on trade in services will be collected during the fieldwork phase of this project using specifically designed questionnaires.

The information provided on trade in goods uses the Harmonized Commodity Description & Coding System (HS Codes), which can be represented in its broadest categories as follows.

- 01-05** Animal & Animal Products
- 06-15** Vegetable Products
- 16-24** Foodstuffs
- 25-27** Mineral Products
- 28-38** Chemicals & Allied Industries
- 39-40** Plastics / Rubbers
- 41-43** Raw Hides, Skins, Leather, & Furs
- 44-49** Wood & Wood Products
- 50-63** Textiles
- 64-67** Footwear / Headgear
- 68-71** Stone / Glass
- 72-83** Metals
- 84-85** Machinery / Electrical
- 86-89** Transportation
- 90-97** Miscellaneous
- 98-99** Service

The analysis in this section will start off dealing with high level categories showing summary tables with overall figures. The analysis will gradually become more detailed with the presentation of more detailed individual country and individual product data. Given the high volume of data, dealing with fifteen (15) CARIFORUM countries and three (3) FCORs, the very detailed information will be presented in individual spreadsheets that are colour coded to make it easy to distinguish the various categories. The Consultants will provide a summary of the data contained in each spreadsheet and provide the name of the spreadsheet so that readers can search for more details if they so desire.

4.1 Overview of Commodities Exports

The following table summarizes the total exports from CARIFORUM to the FCORs¹⁸ for 2006 to 2008 (in US\$).

Table 4.1: Total exports from CARIFORUM to FCORs 2006-2008

Year	Martinique	Guadeloupe	French Guiana	Total Exports
2006	83,537,819	115,471,789	140,198,605	339,208,213
2007	37,062,647	54,234,393	39,838,387	131,135,427
2008	48,805,741	69,816,473	119,523,402	238,145,616

- From 2006 to 2008, there was some level of trade between CARIFORUM and the FCORs in all HS categories.
- Overall export of goods from the CARIFORUM countries to the FCORs was estimated at US\$ 339.2 million in 2006, US\$131.1 million in 2007, and US\$238.1 million in 2008. The total fell in 2007 mainly due to a reduction in exports of oil-based products from Trinidad & Tobago.
- French Guiana accounted for the greatest value of trade with CARIFORUM in 2006-2008, mainly accounted for by the high level of oil imports from Trinidad & Tobago. However, in non-oil based products, Martinique and Guadeloupe typically received more exports from CARIFORUM than French Guiana.
- The category in which the greatest trade took place was Mineral Products and was driven by the oil based exports from Trinidad & Tobago (see table below).

Table 4.2 Exports from CARIFORUM to FCORs by Category (2006-2008) (in US\$)

	2006	2007	2008	AVERAGE
01-05: Animal & Farm Products	4,202,432	4,081,058	3,253,686	3,845,725
06-15: Vegetable Products	4,176,646	2,643,030	4,760,254	3,859,977
16-24: Foodstuffs	4,665,627	5,268,107	8,172,136	6,035,290
25-27: Mineral Products	298,130,188	85,525,074	173,552,153	185,735,805
28-38: Chemicals & Allied Industries	4,466,250	6,851,266	8,806,572	6,708,029
39-40: Plastics/Rubbers	1,248,742	929,355	2,009,031	1,395,709
41-43: Raw Hides, Skins, Leather & Furs	8,627	98	5,625	4,783
44-49: Wood & Wood Products	1,497,243	1,580,762	1,836,639	1,638,215
50-63: Textiles	194,754	55,613	466,219	238,862
64-67: Footwear / Headgear	229,225	268,841	302,459	266,842
68-71: Stone / Glass	80,269	99,273	408,559	196,034
72-83: Metals	19,088,364	23,324,991	33,349,087	25,254,147
84-85: Machinery Electrical	489,962	72,176	111,145	224,428
86-89: Transportation	76,897	74,919	101,667	84,494
90-97: Miscellaneous	652,986	360,865	1,010,384	674,745
TOTAL	339,208,213	131,135,427	238,145,616	236,163,085

¹⁸ The data for Bahamas and Haiti were included from French customs and DR data from both French customs and the DR customs.

- The above table shows that the top five categories of products exported from CARIFORUM to the FCORs over the 2006-2008 period were
 1. Mineral Products
 2. Metals
 3. Chemical and Allied Industries
 4. Foodstuffs
 5. Vegetable products
 6. Animal & Farm Products
- The table below shows exports to the FCORs by individual CARIFORUM countries over the period 2006-2008. It can be seen that the CARIFORUM country that exported the most to the FCORs was Trinidad & Tobago, which accounted for over 90% of all exports to the FCOR in each year.
- Dominican Republic, Dominica followed by Jamaica were the next three largest exporters after which came Suriname, Guyana and Barbados.
- Belize, Antigua & Barbuda, Grenada, St. Kitts & Nevis and St. Vincent & The Grenadines engaged in relatively little exports to the FCORs. In 2007, there were no recorded exports from Belize or Grenada to the FCORs.

Table 4.3 Exports from CARIFORUM to FCORs by Country (2006-2008) (in US\$)

Country	2006	2007	2008	TOTAL	AVERAGE
Antigua & Barbuda	0	176,100	-	176100	88,050
Bahamas	39,196	27,754	7,330,264	7397214	2,465,738
Barbados	945,900	910,629	1,175,786	3032315	1,010,772
Belize	105,155	0	-	105155	52,578
Dominica	3,381,513	3,598,836	5,271,900	12252249	4,084,083
Dominica Republic	4,740,767	10,322,596	7,330,263	22,393,626	7,464,542
Grenada	562	0	791,540	792102	264,034
Guyana	1,751,351	1,733,897	2,058,972	5544220	1,848,073
Haiti	251,294	237,130	236,334	724758	241,586
Jamaica	4,504,578	3,183,448	3,920,432	11608458	3,869,486
St. Kitts Nevis	138,741	291,977	281,950	712668	237,556
St. Lucia	817,934	409,248	647,847	1875029	625,010
St. Vincent & Grenadines	63,235	27,801	7,450	98486	32,829
Suriname	617,870	2,612,407	3,206,072	6436349	2,145,450
Trinidad & Tobago	321,850,117	107,603,604	205,886,806	635340526.9	211,780,176
TOTAL	339,208,213	131,135,427	238,145,616	708,489,256	236,163,085

4.2 Exports of Products to Each FCOR by Individual CARIFORUM Countries 2006 (in US\$)

In the following tables, there is a detailed analysis of the specific products exported to individual FCOR countries by CARIFORUM trading partners (just for 2006).¹⁹ The analysis is conducted under the main HS categories. The tables are self-explanatory and clearly show the value of exports in detail.

Table 4.4: 01-05: Animal & Farm Products Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Guadeloupe	Dominican Republic	1,007	Coral & similar materials,; shells of molluscs/crustaceans/echinoderms & cuttle-bone	050800
Martinique	Grenada	615,413	Fish products	030379; 030269
Martinique	Guyana	56,846	Other fish meat (whether or not minced), frozen, cheese	040690; 030490
Guadeloupe	Jamaica	559,704	Lobster (Homarus spp.), frozen, conch frozen	030612; 030619; 040630
Martinique	Jamaica	2,738,723	Lobster (Homarus spp.), frozen, conch frozen	030612; 030619; 030629
Guadeloupe	St. Kitts & Nevis	138,741	Conch frozen and unfrozen	030619; 030629

Table 4.5: 06-15: Vegetable Products Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Martinique	Bahamas	1,276	Turnips, fresh or chilled.	070610
Martinique	Belize	87,883	Oranges, fresh or dried.	080510
Guadeloupe	Dominica	1,327,143	Dasheen, plantains, yams, avocado, grapefruit, other ground provisions, herbs, fruit, flowers	060310; 060390; 060390; 070930; 070930; 070960; 070990; 071420; 071490; 080119; 080290; 080300; 080430; 080440; 080450; 080510; 080520; 080540; 080550; 080720; 080910; 081090;

¹⁹ These data exclude Suriname because the details were not categorised at the HS 6-digit level. However details for Suriname can be obtained from the individual country report.

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
				090111; 090190; 090240; 090411; 090610; 090810; 091010; 091020; 091091; 091099; 110620; 130190; 151319
Martinique	Dominica	126,521	Yams, avocado, other ground provisions, herbs, fruit, flowers	070700; 070990; 071410; 071420; 071490; 080119; 080300; 080440; 080450; 080510; 080520; 080540; 080550; 081090; 090411; 090611; 090810; 091020; 091099; 110620
Guadeloupe	Dominican Republic	832,269	Bulbs, tubers, tuberous roots, corms, crowns & rhizomes, Tomatoes, fresh/chilled Cabbages, kohlrabi, kale & similar edible brassicas fresh/chilled Vegetables,n.e.s. fresh/chilled Oranges, Mandarins fresh/dried Coffee, not roasted, not decaffeinated	60120, 60290, 70200, 70490, 70700, 70960 70990, 71080, 80440 80510, 80520, 80550 81190, 90111, 91099
Martinique	Dominican Republic	304,489	Bulbs, tubers, tuberous roots, corms, crowns & rhizomes, Tomatoes, fresh/chilled Cabbages, kohlrabi, kale & similar edible brassicas fresh/chilled Vegetables,n.e.s. fresh/chilled Oranges, Mandarins fresh/dried Coffee, not roasted, not decaffeinated	70200, 70490 71490, 80510 80520, 80550 81190
Guadeloupe	Grenada	147	Spices	091091; 091099
Guadeloupe	Guyana	904,282	Other milled white rice, parboiled rice	100620; 100630;
Martinique	Guyana	453,269	Other semi-milled white rice, broken rice, other vegetables	070200; 070310; 070410; 070700; 070820; 070930; 070940; 070990;

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
				071490; 080550; 080711; 090411; 091010; 091040; 091050; 100630; 100640
Guadeloupe	St. Lucia	931	Tea, herbs, spices	090210; 090620; 091010; 091040
Martinique	St. Lucia	3,489	Tea, herbs, spices	090210; 090220; 090411; 090620; 090810; 091010; 091040; 140110
Martinique	St. Vincent	60,237	Wholly milled parboiled rice in packages of not more than 10 kg., Arrowroot starch, ground provisions, herbs, fruit	070960; 070990; 071420; 071490; 080111; 080440; 080450; 080510; 080530; 080540; 090411; 090810; 091010; 100630; 110819
Martinique	Trinidad & Tobago	103,447	Coconuts desiccated Flours and meals of soya beans.	080111; 120810
Guadeloupe	Haiti	3,932	Vegetable fats & oils, whether/not refined but not further prepared	151620

Table 4.6: 16-24: Foodstuffs Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
French Gu.	Barbados	92,988	Rum and tafia	220840
Guadeloupe	Barbados	98,000	Liqueurs and cordials, bread and pastry	220870; 190590
Martinique	Barbados	74,427	Biscuits unsweetened, bread, pastries	190590; 210610; 210690
Martinique	Belize	33,223	Frozen orange juice, concentrate	200911
Guadeloupe	Dominica	79,864	Other waters, aerated beverages, pepper sauces, jams, jellies, pastes	180100; 180310; 180500; 190490; 200791; 200799; 200980; 210390; 220190; 220210; 220290; 220300; 220600

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Martinique	Dominica	39,499	Beer, other waters, aerated beverages, pepper sauces, jams, jellies, pastes	200980; 210390; 220290
French Guiana	Dominican Republic	157,166	Sweet biscuits; Baking products, beer	190531; 190590; 220300
Guadeloupe	Dominican Republic	758,442	Uncooked pasta, Baking products, Peas, Nuts and other seeds, Frozen orange juice Other juice of any other single fruit or vegetable, Other non-alcoholic beverages, not including waters and fruit juice; Beer. Cigars, cheroots and cigarillos, containing tobacco.	190219, 190531, 190590 200540, 200819, 200899 200911, 200980, 220290 220300, 240210
Martinique	Dominican Republic	483,976	Cocoa paste, Baking products Peas, Nuts and other seeds, Frozen orange juice Other juice of any other single fruit or vegetable, Other non-alcoholic beverages, not including waters and fruit juice; Beer. Cigars, cheroots and cigarillos, containing tobacco.	180310, 190531 190590, 200819 200899, 200980 210690, 220300 240210
Guadeloupe	Grenada	319	Jams, jellies, sauces, food preparations, rum and tafia	180690; 200799; 210390; 220840
Martinique	Guyana	230,383	Cane sugar, raw, not containing added flavouring or colouring matter, other pasta	170111; 190230; 190590; 210390; 210690
French Gu.	Jamaica	24,030	Mixture of juices, pepper sauce, soups, food preparations	180500; 180690; 190219; 190230; 200990; 210390; 210410; 210690;
Guadeloupe	Jamaica	425,815	Aerated water, beer, food preparations, juices, bread, pastry	190190; 190590; 200990; 210690; 220210; 220300; 220600
Martinique	Jamaica	213,170	Other fermented beverages (e.g. cider, perry, mead), aerated beverages, other wines, brandy	220870; 220820; 220600; 220421; 220210
French Gu.	St. Lucia	22,382	Aerated beverages	220210
Martinique	St. Lucia	48,471	Food preparations, pepper sauce, other sauces, jellies	151319; 200799; 200899; 210120; 210320; 210390; 210690; 220210
Guadeloupe	St. Vincent	1,815	Poultry, cattle, pigs, other	230990

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
			animal feeds	
French Gu.	Trinidad & Tobago	295,419	Malt beverages, Beer, Food preparations, Stout, Aerated beverages	200990; 210410; 210690; 220210; 220290; 220300
Guadeloupe	Trinidad & Tobago	1,542,601	Beer, stout, malt beverages, aerated beverages	170199; 170410; 170490; 220210; 220290; 220300
Martinique	Trinidad & Tobago	745,383	Malt beverages, Beer, Food preparations, Stout, Aerated beverages	200811; 200819; 200899; 210111; 210390; 210610; 210690; 220210; 220290; 220300; 220890
Martinique	Haiti	9,218	Tobacco	240120

Table 4.7: 25-27: Mineral Products Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Guadeloupe	Dominica	1,774,063	Other natural sands of all kinds, Pebbles, gravel, broken or crushed stone, of a kind commonly used for concrete	250590; 251710
Martinique	Dominican Republic	2,960	Pebbles, gravel, broken or crushed stone, of a kin	251710
Guadeloupe	St. Lucia	23,651	Other natural sands of all kinds, Pebbles, gravel, broken or crushed stone, of a kind commonly used for concrete	251710; 252329
Martinique	St. Lucia	48,863	Pebbles, gravel, broken or crushed stone, of a kind commonly used for concrete	251710
French Gu.	Trinidad & Tobago	66,001,269	Gasoline, other light oils, gas oil, kerosene type aviation spirits, aviation spirits, liquefied butanes	271011; 271019; 271113
Guadeloupe	Trinidad & Tobago	94,055,789	Gasoline, other light oils, gas oil, kerosene type aviation spirits, liquefied butanes	271019; 271113; 271119
Martinique	Trinidad & Tobago	63,302,002	Gasoline, other light oils, gas oil, kerosene type aviation spirits, liquefied butanes	271019; 271113

Table 4.8: 28-38: Chemicals & Allied Industries Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Guadeloupe	Barbados	133,002	Insecticides, other perfumes and toilet water, other beauty or make-up preparations and preparations for the care of the skin, finishing products (dyes)	290960; 300420; 330300; 330499; 330710; 380810; 380991
Martinique	Barbados	60,333	Insecticides, other perfumes and toilet water	330300; 330300; 330790; 380810
French Gu.	Barbados	24,602	perfumes and toilet waters	330300
Guadeloupe	Dominica	35,423	Soaps, essential oils of bay, Bay rum	340119; 340111; 330300; 330129
Martinique	Dominica	14,850	Bay rum, soaps	300390; 330210; 330300; 330499; 330790; 340111; 340119; 340600
Guadeloupe	Dominican Republic	63,555	Phosphates, Preparations for use on the hair, other than shampoo Soap and organic surface-active products and preparations	283529, 330590 340111
Martinique	Dominican Republic	86,780	Calcium hydrogenorthophosphate	283525
Guadeloupe	Grenada	159	Soaps, insecticides, other beauty or make-up preparations	330499; 340111; 380810
Martinique	St. Lucia	26,956	Bay rum, other perfumes, other beauty or make-up preparations	330300; 330499; 340220
French Gu.	Trinidad & Tobago	786,776	Methanol (methyl alcohol), Carbon dioxide, oxygen, acetylene, argon	280421; 280440; 281121; 290129; 290511
Guadeloupe	Trinidad & Tobago	190,164	Carbon dioxide, oxygen, acetylene	280440; 281121; 290129; 330590; 330741; 330790
Martinique	Trinidad & Tobago	2,961,873	Urea, whether or not in aqueous solution, acetylene, oxygen, chlorine, carbon dioxide, other chemicals	280110; 280421; 280440; 281121; 290129; 291421; 310210; 340119; 340120; 340220; 370590
Guadeloupe	Haiti	5,731	Mixtures of odoriferous substance & mixtures, of a kind used in the food/drink industries	330210
Martinique	Haiti	3,004	Essential oils	330190

Table 4.9: 39-40: Plastics/Rubbers Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Martinique	Bahamas	47,903	New pneumatic tyres, of rubber, of a kind used on motor cars (incl. station wagons & racing cars)	401110
Guadeloupe	Dominican Republic	939,394	Sacks and bags Articles for the conveyance/packing of goods, of plastics; Plastic table and kitchen ware Plastic articles nes Rods & profile shapes, Conveyor belts/belting Transmission belts	392321, 392329 392390, 392410 392690, 400829 401019, 401039
Martinique	Dominican Republic	113,011	Plastic table and kitchen ware	392410
French Gu.	Trinidad & Tobago	84,999	Tanks of a capacity exceeding 300 litres, of plastics, Other plates, sheets, film, foil and strip, non-cellular and not reinforced	391740; 392059; 392510; 392690
Guadeloupe	Trinidad & Tobago	29,209	Sacks and bags, Tanks of a capacity exceeding 300 litres, of plastics, other articles of plastic	392329; 392330; 392510; 392690
Martinique	Trinidad & Tobago	41,320	Sacks and bags, Other plates, sheets, film, foil and strip, non-cellular and not reinforced	392059; 392329; 392490; 392510

Table 4.10: 41-43: Raw Hides, Skins, Leather & Furs

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Guadeloupe	Dominican Republic	2,250	Belts and bandoliers of leather or composition leather	420330
Martinique	Dominican Republic	3,745	Belts and bandoliers of leather or composition leather	420330

Table 4.11: 44-49: Wood & Wood Products Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Guadeloupe	Dominica	2,030	Basket ware, wickerwork, Other wood sawn or chipped lengthwise, sliced or peeled, whether or not planed	441900; 442190; 460210; 460290
Martinique	Dominica	7	Printed matter	491199
Martinique	Barbados	310,684	Paper and paperboard labels of all kinds printed, calendars, other printed materials	482110; 482190; 490110; 490191; 490199; 490290; 491000
Guadeloupe	Barbados	214,867	Paper and paperboard labels of all kinds printed, calendars, other printed materials	482010; 482090; 482110; 490110; 490199; 491000; 491110; 491199
French Gu.	Barbados	196	Calendars of any kind, printed books, brochures	490199; 491000
Guadeloupe	Dominican Republic	5,272	Other articles of wood, not elsewhere specified or Folding cartons, boxes and cases, of non-corrugate	442190 481920
Martinique	Dominican Republic	10,817	Doors and their frames and thresholds, of wood. Cartons, boxes and cases,	441820 481910
Guadeloupe	Guyana	37,646	Wooden shingles, other tropical wood, greenheart	440729; 441850
Martinique	Guyana	67,830	Greenheart, Other tropical wood, wooden shingles, hoop wood, wooden sticks	440420; 440729; 441850
Guadeloupe	St. Lucia	29,036	Other articles of wood, carton boxes and cases	442190; 481910
Martinique	St. Lucia	198,329	Cartons, boxes & cases, of corrugated paper or paperboards, doors and frames for thresholds	441820; 481910
French Gu.	Trinidad & Tobago	51,073	Cartons, boxes and cases, of corrugated paper or paperboard, Paper and paperboard labels of all kinds, printed	481910; 481950; 482110; 482319; 491000; 491191
Guadeloupe	Trinidad & Tobago	79,647	Napkins and napkin liners for babies, carton boxes and cases, other printed materials	481840; 481910; 481920; 482110; 482190; 482390; 491199
Martinique	Trinidad & Tobago	258,738	Paper and paperboard labels of all kinds, printed, carton boxes and cases	481910; 481920; 482110; 482319; 491000; 491199

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Guadeloupe	Haiti	50,205	Tableware and kitchenware, of wood. Statuettes and other ornaments Wood marquetry & inlaid wood;	441900 442010 442090
Martinique	Haiti	7,433	Wooden tableware and kitchenware. Printed books, leaflets and similar printed	441900, 490199

Table 4.12: 50-63: Textiles Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Martinique	Barbados	8,336	T-shirts, knitted or crocheted of cotton, Women's swimwear, women or girls overalls	610910; 611241; 611780; 620469; 620899; 621050; 621112; 621290; 621710
Guadeloupe	Barbados	9,548	T-shirts, singlets and other vests of cotton, Brassieres of all types of textile materials, Sails for boats, sailboards, Made up articles of textile materials	610910; 621210; 630631; 630639; 630790
French Gu.	Barbados	1,266	T-shirts, singlets and other vests of cotton, Made up articles of textile materials	610910; 630790
Martinique	Dominica	1,706	Curtains and interior blinds, women's and girls blouses	620690; 630391
French Guiana	Dominican Republic	2,039	Men's/boys' shirts (excl. knitted/crocheted), of cotton	620520
Guadeloupe	Dominican Republic	30,934	Jerseys, pullovers, cardigans, waistcoats Men's/boys' trousers, shirts, bib & brace overalls, breeches & shorts of cotton And of synthetic fibres Women's or girls' ensembles, not knitted Tents, of synthetic fibres	610510, 611020 620342, 620343 620429, 620520 630622
Martinique	Dominican Republic	13,726	Blouses, shirts & shirt-blouses, knitted/crocheted, of cotton Track suits; other garments, n.e.s.	610610 620520 621133

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
French Gu.	Guyana	485	Men or boys bathrobes, t-shirts, pullovers	610590; 610791; 610910; 611019
French Gu.	Trinidad & Tobago	6,552	Jerseys, pullovers, cardigans, waist-coats and similar articles, knitted, T-shirts	610910; 611020
Guadeloupe	Trinidad & Tobago	24,784	Other woven fabrics of cotton, containing 85% or more by weight of cotton, embroidery, T-shirts, women's swimwear	520859; 581099; 610910; 611020; 611249; 630790
Martinique	Trinidad & Tobago	57,115	T-shirts, knitted or crocheted, of cotton, Other sacks and bags for packing goods, of polyethylene or polypropylene strip, men or boys trousers or shorts	610910; 611020; 620349; 620590; 630533
Guadeloupe	Haiti		T-shirts, singlets & other vests, knitted/crocheted, of cotton	610910

Table 4.13: 64-67: Footwear / Headgear

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
French Guiana	Dominican Republic	17,089	Footwear other than with uppers of leather/composition leather/textile materials, n.e.s.	640590
Guadeloupe	Dominican Republic	61,388		640220, 640319 640399
Martinique	Dominican Republic	128,681	Footwear , Sports footwear with outer soles of rubber/plastics/leather/ composition Other footwear	640319, 640351 640391, 640399
Guadeloupe	Haiti	5,538	Hats and other headgear, Wigs, false beards, eyebrows & eyelashes, switches & the like, of animal hair/of textile materials ; articles of human hair, n.e.s.	650400 670490
Martinique	Haiti	9,329	Hats and other headgear, plaited or made by assembly	650400

Table 4.14: 68-71: Stone / Glass

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
French Guiana	Dominican Republic	8,956	Other statuettes and other ornamental ceramic articles,	691390
Guadeloupe	Dominican Republic	21,434	Other articles of cement, of concrete Other statuettes and other ornamental ceramic articles,	681099 691390
Martinique	Dominican Republic	21,822	Worked monumental/building stone & articles thereof other than of granite/marble/travertine/alabaster Other ceramic articles, nes Articles of jewellery and parts thereof, of silver	680229 691490 711311

Table 4.15: 72-83: Metals Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Martinique	Trinidad & Tobago	8,966,664	Bars and rods, hot-rolled, in irregularly wound coils, of iron or non-alloy steel "ECSC"	721399
Guadeloupe	Trinidad & Tobago	10,002,319	Bars and rods, hot-rolled, in irregularly wound coils, of iron or non-alloy steel Sign-plates, name-plates, address-plates and similar plates, numbers, letters and other symbols, of base metal	831000; 721399
Guadeloupe	Dominican Republic	23,375	Other articles of iron or steel. Hand tools	732690 820190
Guadeloupe	Haiti	55,542	Articles of iron or steel.	732690
French Guiana	Haiti	2,563	Articles of iron or steel.	732690
Martinique	Haiti	34,405	Articles of iron or steel. Statuettes & other ornaments, of base metal	732690 830621 830629

Table 4.16: 84-85: Machinery Electrical Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Martinique	Barbados	669	Electronic parts and machinery	847130; 847310; 847330; 850440; 852452; 852499; 853400;
Guadeloupe	Barbados	2,778	Electronic parts and machinery	852499; 853331; 854221; 844390; 853690
French Gu.	Barbados	37	Recorded media for sound or image reproducing phenomena	852499; 853690;
French Guiana	Dominican Republic	1,398	Proximity cards & tags	854381
Guadeloupe	Dominican Republic	4,759	Table/floor/wall/window/ceiling/roof fans, with a self-contained electric motor of an output not >125W Instantaneous/storage water heaters, non-electric	841451 841919
Martinique	Dominican Republic	89,592	Parts of machinery Electric instantaneous/storage water heaters & immersion heaters	843890 847490 851610
Guadeloupe	St. Lucia	373,406	Compression-ignition internal combustion piston engine, pumps, tamping machines, pneumatic tools, data-processing machines, machinery for public works, parts, other machines	840890; 840991; 841330; 842940; 846719; 847990
Martinique	St. Lucia	2,748	Pneumatic tools for working in the hand, Data-processing machines	846719, 847130
Martinique	Haiti	1,619	Discs for laser reading systems	852432

Table 4.17: 86-89: Transportation Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Martinique	Barbados	1,299	Other parts and accessories for motor vehicles of headings 87.02 to 87.05	870899

Table 4.18: 90-97: Miscellaneous Exports 2006

Exported to FCOR	Exported by	US\$	Description of products	HS Codes (6-digit level)
Guadeloupe	Dominica	1,610	Wooden furniture for bedrooms, Wooden furniture (excl. for offices, kitchens and bedrooms, and seats)	940350; 940360
French Guiana	Dominican Republic	111,341	Instruments & appliances used in medical/surgical/veterinary sciences, n.e.s. Other seats, with wooden frames, upholstered Mattress supports; Mattresses of other materials	901890, 940161, 940410 940421, 940429
Guadeloupe	Dominican Republic	187,203	Instruments & appliances used in medical/surgical/veterinary sciences, Other seats, with wooden frames, upholstered. Wooden furniture of a kind used in the bedroom. Mattress supports; Mattresses, of cellular rubber or plastics, and of other materials Fish-hooks, whether/not snelled Line fishing tackle ; fish landing nets, butterfly nets & similar nets; decoy birds & similar hunting/shooting requisites	901890, 940161 940350, 940360 940410, 940421 940429, 950720 950790
Martinique	Dominican Republic	250,764	Instruments & appliances used in medical/surgical/veterinary sciences, Other seats, with wooden frames, upholstered. Wooden furniture of a kind used in the bedroom. Mattress supports; Mattresses, of cellular rubber or plastics, and of other materials Fish-hooks, Paintings, drawings & pastels, Collages & similar decorative plaques	940161, 940180 940340, 940350 940380, 940410 940429, 940490 940600, 950720 970110, 970190
Guadeloupe	St. Vincent	1,183	Wooden furniture (excl. for offices, kitchens and bedrooms, and seats)	940360
Guadeloupe	Haiti	45,476	Paintings, executed entirely by hand, Collages & similar decorative plaques	970110, 970190
French Guiana	Haiti	9,787	Seats	
Martinique	Haiti	6,226	Parts of lamps and lighting fittings; Dolls representing human beings; Tricycles, scooters, pedal cars & similar wheeled toys; dolls; other toys; puzzles of all kinds.	940599, 950210 950300

4.3 Priority Goods Export Opportunities for CARIFORUM (2006-08)

This section of the study shows the main goods exported to the FCORs from CARIFORUM countries as well as those with good export potential. From examining the export data, certain opportunities can be identified in terms of criteria including the following:

If a product is exported to the FCOR by at least any CARIFORUM country, this indicates that there is demand in the FCOR market, which could possibly be further exploited by (other) CARIFORUM countries.

If a product is exported to the FCORs by any CARIFORUM country but not by a neighbouring country with similar production capabilities, then export possibilities could exist in the country that is not exporting to the FCOR. (This could also be due to not finding distributors).

The opportunity now exists to invest in other countries and there is also the possibility to license and operate in another country where intellectual property issues are a concern. From the table below and based on the criteria listed above. The following products have emerged as the priority export products from CARIFORUM to the FCORs.

Products with export opportunity based on the fact that at least four CARIFORUM Countries Export them to the FCORs

- Crustaceans (shrimp, lobsters)
- Fish
- Cereals
- Citrus fruits (Oranges fresh or dried or frozen / grapefruits)
- Roots and tubers
- Beer / liqueurs & cordials
- Bread, pastry, cakes, biscuits and other bakers' wares
- Rum and tafia
- Food preparations / sauces
- Waters
- Medicaments / antibiotics
- Perfumes and toilet waters
- Beauty or make-up preparations
- Paper or paperboard labels of all kinds, Cartons, boxes and cases, of corrugated paper or paperboard printed
- Statuettes and other ornaments, of wood
- Printed books, brochures and similar printed matter
- Men's or boys' trousers, bib and brace overalls, breeches and shorts
- Women's or girls' trousers, bib and brace overalls, breeches and shorts
- Men's or boys' jackets and blazers
- Men's or boys' shirts
- Hats and other headgear, plaited or made by assembling strips of any material, whether or not lined or trimmed

- Paintings and collages

Products with export opportunity based on the fact that at least one CARIFORUM Country exports them to FCORs and other CARIFORUM Countries have similar production capabilities/resources

- Meat (bovine)
- Other vegetables
- Spices
- **Soap, hygiene products**
- Wooden furniture, shingles
- Cartons, boxes and cases, of corrugated paper or paperboard
- Women's or girls' skirts and divided skirts
- Statuettes and other ornamental articles of porcelain or china
- Articles of jewellery and parts thereof

The table below is a derivative of the tables presented earlier and is the basis for the priority export products listed above. The table summarizes all of the products that were exported from CARIFORUM to the FCORs. In the table the following should be noted:

- An asterisk (*) indicates that the particular product was exported by a particular country (e.g. ANT) to the FCORS.
- A (P) indicates that the product has the potential to be exported from the particular country to the FCOR.

It is also worth noting that it is usually acknowledged that informal trade takes place between the FCORs and their closest neighbours: for example fruits and vegetables, garments and textiles from St Lucia and Dominica to Martinique; and similar products from Antigua & Barbuda and Dominica to Guadeloupe

Table 4.19: Particular Exports and Potential Products for Exports

	A N T	B A R	B E L	D O M	D R	G R E	G U Y	J A M	S K N	S L U	S V G	S U R	T & T
Animal & Animal Products													
Live animals, live fowls		*								*			
Crustaceans (shrimp, lobsters)	*						*	*	*		P	P	
Fish	*			*		*	*	P			P	*	*
Live horses, asses, mules and hinnies	P	*											
Meat (bovine, etc.)			P	*	*		P					P	
Cheese							*	*				*	

	A N T	B A R	B E L	D O M	D R	G R E	G U Y	J A M	S K N	S L U	S V G	S U R	T & T
Vegetable Products													
Bananas				*	*						*	*	
Potatoes					*			P			*	*	
Cereals					*		*				*	*	
Citrus fruits (Oranges fresh or dried or frozen / grapefruits)			*	*	*		*	*			*	*	
Other fruits					*								
Pepper					*			*					
Roots and tubers				*	*		*				*		
Other vegetables				*	*	P					P		
Spices				*		P		P		P	P		P
Foodstuffs													
Rice							*				*	*	
Beer / liqueurs & cordials	P	*	P	*	*	*	P	*	*	P	P	*	*
Bread, pastry, cakes, biscuits and other bakers' wares		*		*	*		*	*				P	P
Rum and tafia		*			*	*	P	*					P
Food preparations / sauces	P	*	P	*	*		*	*	P	*	P	*	*
Waters	P		P	*	P		*	*		*	*	*	*
Cigars, tobacco					*								
Mineral Products													
Pebbles, gravel, broken or crushed stone, for concrete aggregates				*						*			
Clays, lime					*								
Light oils and preparations, of petroleum or bituminous minerals					*								*
Butanes, liquefied					*								*
Chemical & Allied Industries													
Medicaments / antibiotics		*					*	*					*

	A N T	B A R	B E L	D O M	D R	G R E	G U Y	J A M	S K N	S L U	S V G	S U R	T & T
Perfumes and toilet waters		*		*	*			*					
Beauty or make-up preparations		*		*	*	*		*					
Soap, hygiene products	P	P	P	*	*	P	P	P	P	P	P	P	P
Lubricating oil												*	
Plastics & Rubbers													
Reservoirs, tanks, vats and similar containers, of plastics					*								*
Plastic Table & Kitchenware					*								
Household articles and toilet articles, of plastics					*			*					*
Sacks and bags, incl. cones, of plastics		*			*								
Pneumatic tyres, conveyor belts					*								
Raw Hides, Skins, Leathers & Furs													
Handbags							*						*
Travelling-bags, suitcases					*								*
Wood & Wood Products													
Cartons, boxes and cases, of corrugated paper or paperboard			P		*		P	P		*		P	
Napkins					*								
Paper or paperboard labels of all kinds, printed		*	P		*		P	P		*		P	*
Statuettes and other ornaments, of wood	P		P	*	*	P	P	*	P	P	P	*	P
Wooden furniture, shingles			P	*	*		P	P				*	
Printed books, brochures and similar printed matter		*			*		*	*					
Basketwork				*									
Textiles													
Men's or boys' trousers, bib and brace overalls, breeches and shorts		*		*	*		*	P		*			*

	A N T	B A R	B E L	D O M	D R	G R E	G U Y	J A M	S K N	S L U	S V G	S U R	T & T
Women's or girls' skirts and divided skirts		P	P	P	P		P	*		*			*
Women's or girls' trousers, bib and brace overalls, breeches and shorts		*			*			*		*			*
Men's or boys' jackets and blazers				*	*		*			*			*
Women's or girls' dresses													*
Men's or boys' shirts ***				*	*		*	*					*
Footwear & Headgear													
Footwear with outer soles of rubber or plastics					*		*					*	*
Hats and other headgear, plaited or made by assembling strips of any material, whether or not lined or trimmed		*		*			*						*
Stone/Glass													
Statuettes and other ornamental articles of porcelain or china		*			*			*					P
Ceramic flooring blocks, support or filler tiles and the like					*								*
Articles of jewellery and parts thereof		P			*		*	P					P
Metals													
Screws, bolts, nuts and similar articles, threaded, of copper					*			*				*	
Doors, windows, frames and thresholds for door, of aluminium					*								*
Bars and rods, hot-rolled, in irregularly wound coils, of iron or non-alloy steel					*								*
Machinery & Electrical													
Media for the recording of sound or image of other phenomena		*		*				*					

	A N T	B A R	B E L	D O M	D R	G R E	G U Y	J A M	S K N	S L U	S V G	S U R	T & T
Optical media for the recording of sound or of other phenomena								*					
Air conditioning machines					*								*
Machinery and apparatus for filtering or purifying gases													*
Other electrical machinery					*								
Transportation													
Fishing vessels; factory ships and other vessels for processing or preserving fishery products													*
Containers										*		*	*
Motor-cycles										*			
Miscellaneous													
Appliances used in medical/surgical/veterinary sciences					*								
Seats / parts of seats				*	*		*	*					
Mattresses, mattress supports					*								
Paintings, collages		*			*							*	*
Prefabricated buildings, whether or not complete or already assembled					*		*						*

5.0 Analysis of Exports from the FCORS to CARIFORUM 2006-2008

In this section, the analysis of export goods from the FCORs to CARIFORUM is presented in a similar fashion as for the section on exports from CARIFORUM countries to the FCORs.

Note that amounts are expressed in US\$, using average exchange rates available for each year, as follows:

Yearly average for 2006:	\$1 = Euro 0.797
Yearly average for 2007:	\$1 = Euro 0.731
Yearly average for 2008:	\$1 = Euro 0.683

5.1 Overview of Commodities Exports

The following table summarizes the total exports from the FCORs to the CARIFORUM countries under study for years 2006 to 2008.

Table 5.1: Overall exports from FCORs to selected CARIFORUM countries (2006-2008, US\$)

Country	2006	2007	2008
Antigua & Barbuda	9,251,447	79,037	6,567,391
Bahamas	0	39,607	0
Barbados	428,487	28,274	87,354
Dominica	787,043	2,180,469	1,585,193
Dominican Republic	621,442	723,445	2,173,641
Grenada	99,085	133,900	10,876
Haiti	2,419,541	427,952	636,823
Jamaica	0	1,543	946,343
St. Kitts & Nevis	31,286	86,468	18,832
St. Lucia	77,379,513	13,705,546	1,051,562
St. Vincent & The Grenadines	1,016,123	901,194	825,608
Suriname	4,432,174	1,880,544	653,773
Trinidad & Tobago	3,551,518	7,897,083	1,660,697
Total	100,017,659	28,085,063	16,218,092

- Overall exports of goods from the FCORs to CARIFORUM experienced a drastic decline **from \$100,017,659** in 2006 **to \$28,085,063** in 2007. Hurricane Dean and the suppression of Martinique Regional Council aid to transport (in 2007) partly explain the drastic decline from 2006 to 2007, as the most significant drop occurred in products derived from oil and minerals; and to a lesser extent to important fluctuations in the electrical machinery, metals and transportation sectors.
- These fluctuations vary quite significantly from one FCOR to another, both in volume and direction; in fact a closer look at the detailed spreadsheets is necessary to appreciate some interesting differences amongst FCOR exports. For example, significant increases in Guadeloupe exports in electrical machinery and metals over that period is usually offset by a major slowdown in Martinique (mineral-based product) exports.
- **St Lucia** is by far the greatest CARIFORUM importer of FCOR products (mostly from Martinique), followed by **Antigua & Barbuda** and in third position by **Trinidad & Tobago**. In 2008, the Dominican Republic became an important importer of products from Guadeloupe (mainly electrical machinery).
- Export trends are generally very low to **Jamaica** and **St Kitts and Nevis** although year 2008 witnessed a high peak in French Guiana electrical machinery exports to Jamaica.
- In a similar fashion as for CARIFORUM exports, the category in which the greatest trade took place was **Mineral Products** and was driven by the refined oil based exports from Martinique (see table below).
- The top five categories of products exported from the FCORs to CARIFORUM over the 2006-2008 period are as follows:
 1. Mineral Products
 2. Machinery Electrical
 3. Transportation
 4. Metals
 5. Chemicals & Allied Industries
- Comparing CARIFORUM and FCORs top 5 exports, we observe some intra-industrial trade taking place in Mineral products, Chemicals and Allied Industries and Metals.
- The implications of these comparisons are that there are some product categories in which there may be some comparative advantage for
 - CARIFORUM countries such as Foodstuffs, vegetable products
 - FCORs such as Electrical machinery, Transportation.

Table 5.2 Exports of goods from FCORs to CARIFORUM by Category (2006-08) (US\$)

Category	2006	2007	2008
01-05: Animal & Farm Products	1.401.061	1.803.510	221.253
06-15: Vegetable Products	11.188	26.135	18.104
16-24: Foodstuffs	90.132	166.914	455.524
25-27: Mineral Products	90.306.055	19.657.289	8.346.357
28-38: Chemicals & Allied Industries	122.789	187.986	690.466
39-40: Plastics/Rubbers	21.971	90.977	275.206
41-43: Raw Hides, Skins, Leather & Furs	72.577	264.166	50.357
44-49: Wood & Wood Products	109.790	70.086	53.354
50-63: Textiles	21.833	23.311	5.334
64-67: Footwear / Headgear	41.706	-	-
68-71: Stone / Glass	19.875	27.642	35.160
72-83: Metals	415.128	2.766.034	202.694
84-85: Machinery Electrical	4.808.006	559.311	4.279.209
86-89: Transportation	2.553.792	2.257.116	1.561.896
90-97: Miscellaneous	21.754	184.587	23.177
TOTAL	100.017.659	28.085.063	16.218.092

Over the 2006-2008 period, there was trade between the FCORs and CARIFORUM countries in all HS categories.

The table below shows that **Martinique** is clearly the largest FCOR exporter to CARIFORUM in 2006-2008, which is mainly accounted for by the high level of oil-based and mineral products exported to St Lucia, Antigua and Barbuda, SVG, T&T.

Guadeloupe and French Guiana are slowly narrowing the gap, with a significant increase in 2007 (probably overtaking some of Martinique exports as a result of Hurricane Dean severely affecting Martinique's trade performance during that year).

Table 5.3: FCOR Export Totals to CARIFORUM

Year	Martinique	Guadeloupe	French Guiana	Total FCORs (US \$)
2006	92.840.356	1.381.576	5.795.726	100.017.659
2007	16.077.658	7.963.628	4.043.777	28.085.063
2008	10.841.432	3.182.902	2.193.758	16.218.092

5.2 Analysis of Priority Exports from the FCORs to CARIFORUM 2006-2008

The following table shows the main commodities exported (*) and the potential for export (P) from the FCORs to CARIFORUM countries. From examining the export data, certain opportunities can be identified using the following criteria:

- If a product is exported to CARIFORUM by at least one FCOR territory, this indicates that there is demand in the CARIFORUM market, which could possibly be further exploited by (other) FCOR territories.
- If a product is exported to one CARIFORUM country but not another (e.g. exported to Barbados but not to Trinidad & Tobago), then there is a possibility that it could be exported to the other (e.g. exported to Trinidad & Tobago as well). This would also depend on production and transportation constraints.
- If a product is exported to CARIFORUM by one FCOR country but not by another FCOR with similar production capabilities, then export possibilities could exist in the FCOR that is not exporting to CARIFORUM.

Table 5.4: FCORS Priority Areas for Export

PRIORITY SECTOR	French Guiana	Guadeloupe	Martinique
Animal & Animal Products			
Fish & Fish Processing	P		P
Fisheries/Seafood	*	P	*
Aquaculture			P
Vegetable Products			
Agriculture	*	*	*
Agro-processing	P	*	*
Foodstuffs			
Food, Beverage & Nutraceuticals	P	P	*
Mineral Products			
Mining	*		*
Chemicals & Allied Industries			
Chemicals, medicines	P	*	*
Wood & Wood Products			
Forestry	*		
Stone/Glass			
Stone/glass			*
Metals			
Metals		*	*
Machinery Electrical			
Machinery	*	*	*
Transportation			
Transportation	*	*	*

5.3 Overview of other opportunities

Besides opportunities strictly in terms of exports, recent social upheavals in the FCORs point to other types of positive economic spillovers usually associated with trade liberalisation and preferential agreements. Following the implementation of the EPA, the FCORs might indeed benefit from:

- Cheaper intermediate goods originating from CARIFORUM markets and subsequent reduction in production costs;
- Economies of scale on (Caribbean) goods produced locally and re-exported to European markets, but also sold on local markets;
- Improvements in terms of final consumer surplus and utility, through products diversification and lower prices;
- Job creation in specific types of services (risk-prevention, environment, transport, tourism, communication, etc.), and export-oriented activities with higher value-added transformation (agro- or fish-processing for example)
- Overall economic, cultural and social dynamism brought about by a renewal in terms of regional integration enhanced by the signing of the EPA.

5.4 Overview of key regulatory issues relating to operating in the FCOR business environment

Table 5.5: Regulatory issues relating to operating in the FCOR business environment

Issue	Justification
Movement of people Visa for FCORs Schengen access	The Caribbean business community has usually faced greater difficulties accessing the FCORs (compared to mainland France, which is part of the Schengen area). Since December 2009, 7 Caribbean countries have been granted a short-period visa waiver (up to 90 days) to the FCORs. However, individuals from CARICOM still complain that they have problems entering Martinique even when they have a visa or where there are no visa requirements.
Period of 90 days to visit the EU without work permit	Six categories qualify: 1. Research & design 2. Market research 3. Training seminars 4. Trade Fairs and Exhibitions 5. Sales 6. Tourism and Tourism personnel
Lack of bilateral conventions on investment	Double tax imposition penalize foreign investment in the region

Issue	Justification
Legal or banking-investment-risk-related impediments	FCORs banks require FCOR firms to be granted COFACE ²⁰ liability insurance to fund or finance operations in other Caribbean markets (COFACE usually consider them not safe enough)
Rules of Origin Extension to Protocol I	The CARIFORUM may now benefit from more favourable Rules of Origin to export to the EU (Special attention to products such as biscuits, garments, fishing, sugar ²¹)
Lack of Harmonisation of CARIFORUM and FCOR rules and standards in specific services required	Accounting, auditing, bookkeeping, Architecture, conventions, courier, engineering, entertainment, environmental, hospital, IT, management consulting, maritime, scientific and technical consulting, telecommunications, tourism/travel-related, transport, (look at Royalties in music, MRAs for architects and engineers)
Lack of harmonisation in Intellectual Property rights	<p>FCOR or CARIFORUM innovators are commonly unable to protect their IP rights across the region as a whole. They have to register on a national basis (only major companies have the means to protect their rights world-wide)</p> <p>Current lack of harmonisation across the region would require:</p> <ul style="list-style-type: none"> - the creation of a regional organization to guarantee property rights according to international standards and a regional database. - Joining ACTA²² initiative as a region
Structural and legal adjustments in air or sea transport	<p>Needs for a better organization and adjustment to transport small volumes of goods and persons (promote grouping and facilitate regional cabotage)</p> <p>Tackle existing legal restrictions on access to sea and air transport markets: joint regional initiatives are required to overcome national flag and reciprocity rules, as well as cabotage or "short-sea shipping" issues to allow for mix international and national shipping.</p>

²⁰ COFACE is a specialised export credit insurance company founded in 1946, managing its own products and State guarantees for French export.

²¹ Although the sugar protocol expired in October 2009, special provisions related to this protocol are extended to more Caribbean countries (than the traditional ACP suppliers under the sugar protocol) and maintained through a transitional period until 2015, with a minimum price guaranteed until 2012. However, sugar (along with banana) are still excluded from FCORs market liberalisation for a period of 10 years (renewable).

²² **ACTA:** Anti-Counterfeiting Trade Agreement. ACTA negotiations started in 2008 with the participation of Australia, Canada, the European Union and its 27 member states, Japan, Mexico, Morocco, New Zealand, Republic of Korea, Singapore, Switzerland and the United States and are expected to be concluded in September 2010 (see *Foreign Affairs and International Trade Canada*)

6.0 Priority Services Export Sectors

Section 6 consists of 6 tables presenting data on both CARIFORUM and FCOR.

- ❑ Table 1 shows the Priority Services Exports for select CARIFORUM countries put together based on data gathered from CARICOM Countries National Export Strategies, Development Plans & Official Investment Authorities and Country visits.
- ❑ Table 2 shows highlights rationale/reasons for Sectors listed as priority for export by 5 or more CARIFORUM Countries
- ❑ Table 3 shows the FCORs Priority Services Exports using the UNCPCprov Classification (Provisional Central Product Classification)
- ❑ Table 4 shows the Sectors listed by ALL three FCOR as priority for export:
- ❑ Table 5 shows the differences & similarities (CARIFORUM & FCOR) in Priority Sectors for Export
- ❑ Table 6: France's Restrictions under the EPA which may have implications for CARIFORUM Services Providers

6.1 Selected Countries Priority Services Exports Classified using the UN CPCprov (Provisional Central Product Classification)²³

Due to the fact that trade in services data are not collected for CARIFORUM trade, it was not possible to conduct the priority/opportunity analysis based on actual trade data over a period as was done earlier for commodities exports. Instead, the Consultants based their findings on qualitative evidence obtained from the following sources:

- National Development Plans
- National Export Strategies
- Previous Studies
- Focus Group discussion and Interviews with key players

Out of this approach, the Consultants developed the following table of export opportunities/ priorities and classified them using the UNCPC Codes rather than the HS Codes that were used for commodities.²⁴ More details are provided in Individual Country Reports contained in Volume 2.

- . In the table below the following should be noted:
 - An asterisk (*) indicates that the particular service industry was prioritized by a particular country (e.g. ANT) as a sector with export potential.
 - A (P) indicates that the service has the potential to be exported from the particular country to the FCOR given that another country with similar capacities has prioritized it for exports.

²³ This includes sources such as National Development Plans, National Export Strategies, other secondary research and information collected by the Consultants during country field visits.

²⁴ See Appendix 3 for details on the HS and the UN CPCprov (Provisional Central Product Classification) .

Table 6.1: CARIFORUM Priority Services Exports

CODE	Service	ANT	BAR	DOM	DR	JAM	SLU	SVG	SUR	T&T
5	Construction work and constructions; land									
51	Construction work	*	*	*	*	P				P
52	Constructions	*	*							
53	Land									
6	Trade services; hotel and restaurant services									
61	Sale, maintenance and repair services of motor vehicles and motorcycles				*					
62	Retail trade services; repair services if personal and household goods									
63	Hotel and restaurant services			*	*	P				
641	<i>Hotel and other lodging services</i>	*	*	*	*	*	*	*	*	*
642	<i>Food serving services</i>	*	*	*	*	*	*	*	*	*
643	<i>Beverage serving services for consumption on the premises</i>	*	*	*	*	*	*	*	*	*
7	Transport, storage and communications services									
71	Land transport services							P	*	
72	Water transport services	*			*	P	*		*	
73	Air transport services	*			*		*		*	P
741	Cargo handling services				*	P				*
746	Supporting services for air transport				*					*
748	Freight transport agency services				*					*
74	Supporting and auxiliary transport services				*					
747	<i>Travel agency, tour operator and tourist guide services</i>	*	*	*	*	*	*	*	*	*
7472	<i>Tourist guide services</i>	*	*	*	*	*	*	*	*	*
75	Post and telecommunications services									
752	<i>Telecommunications services</i>	*			*					
8	Business services; agricultural, mining and manufacturing services									

CODE	Service	ANT	BAR	DOM	DR	JAM	SLU	SVG	SUR	T&T
81	Financial intermediation services and auxiliary services therefore	*	P		*	P				P
82	Real estate services									
83	Leasing or rental services without operator									
84	Computer and related services		*	*		*	*	*		
843 -	Data processing services			*						
85	Research and development services									
86	Legal, accounting, auditing and book-keeping; management and consulting services; architectural, engineering and other technical services		*	*	*	P			P	P
862 -	Accounting, auditing and book-keeping services		P	*	*	P			P	P
867	Architectural, engineering and other technical services		*	*	*	P				P
8650	Management consulting services			*	*	P	*			P
87	Business service, n.e.c		*	*	*	P				
8790	Other business services		*							
88	Agricultural mining and manufacturing services					P			P	P
887	Services incidental to energy distribution		*	*	*	*		*	P	P
89	Intangible assets									
9	Community, social and personal services									
91	Public administration and other services to the community as a whole; compulsory social security services									
92	Education			*	*					
92310	Post-secondary technical and vocational education services	*	*	*	*	*	*		P	P
92390	Other higher education services	*	*			*	*			P
93	Health and social services									
93193	Residential health facilities services other than hospital services	*	P	*		P	P	P	P	P
93191	Other human health services n.e.c.	*								

CODE	Service	ANT	BAR		DOM	DR		JAM		SLU	SVG	SUR	T&T
94	Sewage and refuse disposal, sanitation and other environmental protection services												
95	Services of membership organizations												
96	Recreational, cultural and sporting services	*	*		*	*		P		P	*	P	P
961	<i>Motion picture, radio and television and other entertainment services</i>	P	P		P	P		*		P	P	P	*
9641	<i>Sporting services</i>											*	
97	Other services												
97029	<i>Other beauty treatment services n.e.c.</i>	*	*		*	P		P		P	P	P	P
98	Private households with employed persons												
99	Services provided by extraterritorial organizations and bodies												

Source: CARICOM Countries National Export Strategies, Development Plans & Official Investment Authorities, Country visits

Among the priority industries listed by the CARIFORUM countries in their export or development plans or based on focus group discussions, the following industries (in order of popularity) were common across 5 or more member states:

1	Tour Operator & Tour Guide Services
2	Hotel & Restaurant Services
3	Educational Services: Technical & Vocational Services
4	ICT
5	Cultural Industries
6	Energy Distribution Services

For the services industries listed, reasons for establishing these industries as priority for exports were similar for all member states. These common reasons are elaborated in the table 2 below:

In terms of services industries with potential in exports, the following were included:

- Financial intermediation services and auxiliary services therefore
- Accounting, auditing and book-keeping services
- Architectural, engineering and other technical services
- Management consulting services
- Agricultural mining and manufacturing services
- Residential health facilities services other than hospital services
- Motion picture, radio and television and other entertainment services
- Other beauty treatment services

Table 6.2: Rationale for selecting Industries listed as priority for export by 5 or more CARIFORUM Countries

Sector	Common reasons
Educational Services: Technical & Vocational	<ul style="list-style-type: none"> ❑ ELT and TVE are both growing sectors across CARIFORUM Member States ❑ CARIFORUM Member States have an active and vibrant education industry with strong growth potential. ❑ CARIFORUM Member States are relatively close to major regional source markets such as Brazil, Venezuela ❑ Visa requirements are not as strict as for CARIFORUM Member States as most popular ELT destinations ❑ Japan is a significant source market for Caribbean tourism and, with its potential to sell ELT with other activities, this is a major opportunity for CARIFORUM Member States
Tour Operators & Tour Guide Services	<ul style="list-style-type: none"> ❑ CARIFORUM Member States is blessed with many natural tourism assets diverse product, green, unspoilt environment ❑ Niche market products – Caribbean governments have recognised that natural resource comparative advantage alone does not guarantee consumer demand for tourism ❑ For many CARIFORUM Member States, aside from their current dream vacation, adventure and eco-tourism products, opportunities exist for the development of niche tourism markets and the services to support these new markets
Hotel & Restaurant Services	<ul style="list-style-type: none"> ❑ CARIFORUM Member States over the years have become a prime destination for vacation equipped with a variety of accommodations from business to personal ❑ CARIFORUM Member States are beginning to gear their tourism its tourism towards the high-end tourism market ❑ Member States are equipped with English-speaking, hardworking, and educated workforce ❑ Successful precedents: CARIFORUM Member States has proven success with established multinational and local food and beverage companies, including Nestle, Unilever, Coca-Cola and Carib Breweries ❑ Advantageous geographic location and availability of markets, with close proximity to North American, South American, and Caribbean American markets, plus direct trade access to CARIFORUM market ❑ CARIFORUM Member States have a strategic shipping and trade advantage and has reached numerous agreements with its surrounding markets and are close enough in proximity to reach them quickly

Sector	Common reasons
	<ul style="list-style-type: none"> ❑ Significant opportunity in the area of specialty Caribbean food products, such as spices, marinades and sauces.
ICT	<ul style="list-style-type: none"> ❑ CARIFORUM Member States have an active ICT sector centred around software development services and has become a prime destination for the call centre industry in the western hemisphere. ❑ Exporting is already taking place across CARIFORUM Member States especially in the call centre segment of the international ICT market ❑ CARIFORUM Member States are known for creativity which could be stretched to the ICT ❑ CARIFORUM Member States have English as a first language and time zone same as main (buyer) markets (N. America) while complementing the partner (supplier) markets (Asia & Europe) ❑ The growing number of international ICT companies establishing in CARIFORUM Member States is evidence of its international competitiveness.
Energy Distribution Services	<ul style="list-style-type: none"> ❑ CARIFORUM Member States provide a number of opportunities for investors within the energy sector, particularly with regards to petroleum, gas and hydropower generation ❑ The energy sector is competitive in the Caribbean, which has 9.7% of the world's oil reserves ❑ CARIFORUM Member States can learn from the experience of nations such as the successful implementation of solar water heaters in Barbados, beginning in the 1970s, as well as Brazil's development of sugar-cane based ethanol as a viable alternative to gasoline in powering automobiles. ❑ Trinidad & Tobago could act as the regional hub for the supply of natural gas across the Caribbean.
Cultural Industries	<ul style="list-style-type: none"> ❑ There are high capabilities in artistic and creative productions in the industry and there exist opportunities for investment in several different creative industries ❑ CARIFORUM Member States are equipped with creative and skilled individuals in several aspects of cultural industry (art, craft, design, fashion, music, film) ❑ CARIFORUM Member States are rich and diverse in culture and have the opportunity to attract visitors from all across the world ❑ The success of CARIFORUM artists such as Bob Marley, Sean Paul, Rihanna and Kevin Lyttle has raised the international profile of the domestic music scene and created a sense that there is a unique Caribbean 'sound'.

Source: CARICOM Countries National Export Strategies, Development Plans & Official Investment Authorities

The rationale for selecting the services industries with export potential are as follows:

- Financial intermediation services and auxiliary services – there are well regulated financial services sectors in several CARIFORUM countries which are currently serviced by reputable foreign, regional and local entities in both the offshore industry and the domestic industry.
- Accounting, auditing and book-keeping services – there is an abundance of internationally trained and experienced professionals across CARIFORUM countries
- Architectural, engineering and other technical services - there is an abundance of internationally trained and experienced professionals across CARIFORUM countries
- Management consulting services - there is an increasing number of internationally trained and regionally experienced professionals across CARIFORUM countries
- Agricultural mining and manufacturing services – there are several countries in CARICOM with strong mining and manufacturing industries with professionals that could offer related services.
- Residential health facilities services other than hospital services – there are good health facilities in several CARIFORUM countries, these could be improved and combined with facilities in the hotel industry to form the basis of health tourism exports
- Motion picture, radio and television and other entertainment services – the Regions beauty, climate and attractiveness to tourists could be leveraged into a successful regional industry for films, media and entertainment
- Other beauty treatment services – there are plants and minerals in the CARIFORUM that could be used to develop a regional beauty treatment industry that could be branded and linked into the health and wellness tourism market.

6.2 FCORs Priority Services Exports

Since trade in services is hardly observed or measured in the FCORs, in this section, key sectors were identified as potential or existing opportunities based upon

- ground survey,
- CARIFORUM market opening grid
- Regional, national and European development plans and strategies
- studies conducted on services provided on local FCOR markets.

A few FCOR companies have already exported their services to some CARIFORUM markets but those initiatives seem to remain limited in number and time.

Table 6.3: FCORs Priority Services Exports

CODE	Service	FG	GPE	MQ
5	Construction work and constructions; land			
51	Construction work	*	*	*
52	Constructions	*	*	*
53	Land			
6	Trade services; hotel and restaurant services			
61	Sale, maintenance and repair services of motor vehicles and motorcycles	*	*	*
62	Retail trade services; repair services if personal and household goods	*	*	*
63	Hotel and restaurant services	*	*	
641	<i>Hotel and other lodging services</i>	*	*	
642	<i>Food serving services</i>	*	*	
643	<i>Beverage serving services for consumption on the premises</i>		*	*
7	Transport, storage and communications services			
71	Land transport services			
72	Water transport services		*	*
73	Air transport services			
741	Cargo handling services		*	
746	Supporting services for air transport	*	*	*
748	Freight transport agency services	*	*	*
74	Supporting and auxiliary transport services	*	*	*
747	<i>Travel agency, tour operator and tourist guide services</i>	*	*	*
7472	<i>Tourist guide services</i>			

CODE	Service	FG	GPE	MQ
75	Post and telecommunications services	*	*	*
752	Telecommunications services	*	*	*
8	Business services; agricultural, mining and manufacturing services			
82	Real estate services			
83	Leasing or rental services without operator			
84	Computer and related services	*	*	*
843 -	Data processing services			
85	Research and development services	*	*	*
851 -	Research and experimental development services on natural sciences and engineering	*		
86	Legal, accounting, auditing and book-keeping; management and consulting services; architectural, engineering and other technical services	*	*	*
862 -	Accounting, auditing and book-keeping services			
867	Architectural, engineering and other technical services	*	*	*
8650	Management consulting services		*	*
87	Business service, n.e.c	*	*	*
8790	Other business services	*	*	*
88	Agricultural mining and manufacturing services	*	*	*
887	Services incidental to energy distribution	*	*	*
89	Intangible assets			
9	Community, social and personal services			
91	Public administration and other services to the community as a whole; compulsory social security services	*	*	*
92	Education	*	*	*
92310	Post-secondary technical and vocational education services	*	*	*
92390	Other higher education services	*	*	*
93	Health and social services	*	*	*
93193	Residential health facilities services other than hospital services	*	*	*
93191	Other human health services n.e.c.	*	*	*
94	Sewage and refuse disposal, sanitation and other environmental protection services		*	*

CODE	Service	FG	GPE	MQ
95	Services of membership organizations			
96	Recreational, cultural and sporting services	*	*	*
961	<i>Motion picture, radio and television and other entertainment services</i>	*	*	*
9641	<i>Sporting services</i>	*	*	*
97	Other services			
97029	<i>Other beauty treatment services n.e.c.</i>	*		
98	Private households with employed persons			
99	Services provided by extraterritorial organizations and bodies			

Commonly, the niches identified are sectors where the FCORs show comparative advantage in terms of expertise and access to (European) higher technologies.

Moreover, their Caribbean neighbors need to enhance their service sectors to reach European standards and improve their production capacities.

Table 6.4: Rationale for sectors listed by ALL three FCOR as priority for export

Sector	Common reasons
Agriculture and agro-processing	<ul style="list-style-type: none"> <input type="checkbox"/> There is scope for CARIFORUM raw material processing into high-value added products to be sold locally and re-exported to the EU or the Caribbean. <input type="checkbox"/> Some CARIFORUM countries offer a great variety of fruits and vegetables that can be imported and processed at relatively competitive rates <input type="checkbox"/> For example, food preparations based on fruit, vegetables, milk, fine chocolate or fish (for human or animal feeding) <input type="checkbox"/> Regional agencies such as PARM and PRAM can help local businesses with adequate training and facilities (equipment, funding). <input type="checkbox"/> Comparative advantage in beverages: Rum (Martinique rum label of origin, WIRSPA members) and mineral waters
Machinery	<ul style="list-style-type: none"> <input type="checkbox"/> Re-exports of electrical machinery for industrial

Sector	Common reasons
	<p>and domestic use, yachting, etc.</p> <ul style="list-style-type: none"> ❑ Existing exports to some CARIFORUM countries (Saint Lucia, Suriname, etc..) could be extended to other islands
<p>Construction work</p> <p>Architectural, engineering and other technical services (environment, waste treatment, etc.)</p>	<p>FCORs construction and engineering sectors are in possession of::</p> <ul style="list-style-type: none"> ❑ up-to-date technology and equipment to develop specific technology and materials to enhance constructions safety. ❑ highly qualified experts (see IRISTA network, CIRAD, UEMER, ECOFOG) in civil engineering, sustainable development and safe construction, construction in tropical areas. ❑ Knowledge of European norms, consumers taste and business culture ❑ The FCORs have some advanced waste treatment technology and equipment ❑ Risk prevention appears naturally on Caribbean top priorities for development, specially with regards to recent events in the region and ❑ the FCORs come under binding EU legislation in earthquake- and natural disaster-resistant construction, thus ❑ FCOR firms may export their know-how and expertise in terms of natural risk prevention. ❑ FCOR Regional Councils foster collaboration between private businesses and public research centres. ❑ The majority of FCOR small businesses belong to the construction sector ❑ Professional training in environmental protection (sewage and waste treatment, natural resources management) available in the FCORs
<p>Retail trade services; repair services if personal and household goods (including motor vehicles)</p>	<ul style="list-style-type: none"> ❑ The FCORs have a potential to add value to CARIFORUM products and re-export the finished products to EU and Caribbean markets (complying with EU standards) ❑ The FCORs have a sound experience in

Sector	Common reasons
	distribution services and major FCOR/French groups have been developing their distribution network in some islands of the region (DR for example)
Transportation Services and services auxiliary to transport	<ul style="list-style-type: none"> <input type="checkbox"/> The FCORs have set up and harmonised automated cargo system and maritime transport database <input type="checkbox"/> FCOR agency currently under prospection and negotiation with several Caribbean countries to develop this harmonized automated cargo system to enhance maritime trade and inter-island "cabotage" in the region. <input type="checkbox"/> Jarry (Guadeloupe) port is being enlarged and thought to become a regional hub
ICT Telecommunication Services; Computer and related-services	<ul style="list-style-type: none"> <input type="checkbox"/> The development of the mobile phone industry in the Caribbean and the arrival of the Internet have encouraged the development of the communication sector <input type="checkbox"/> The FCORs are equipped with state of the art telecommunication technology and the submarine cable connects with neighbouring islands <input type="checkbox"/> The aerospace industry provides services in terms of tele-technologies: surveillance of the Amazonian forest environment, telemedicine, PSMA (advanced medical assistance) useful in case of epidemia, access difficulties, air industry <input type="checkbox"/> Needs in software and automated systems creation or harmonization
Legal, accounting, auditing and book-keeping;	<ul style="list-style-type: none"> <input type="checkbox"/> CARIFORUM actors willing to invest or set up a business in the FCOR/France require expertise and training to meet French standards and norms
Management and consulting services;	<ul style="list-style-type: none"> <input type="checkbox"/> Global trends have stimulated a significant growth in the sector. <input type="checkbox"/> The FCORs have a comparative advantage in terms of knowledge of European norms, consumers taste and business culture <input type="checkbox"/> CARIFORUM-EU EPA creates a demand on Caribbean side for expertise to meet EU

Sector	Common reasons
	standards
Agriculture and Manufacturing services	<ul style="list-style-type: none"> ❑ Import semi-processed CARIFORUM goods and re-export high-value added products ❑ Certified FCOR firms can provide standardized EU labelling and packaging for products coming from different CARIFORUM countries (and re-export to the EU)
Energy distribution services	<ul style="list-style-type: none"> ❑ Global awareness and trend towards the preservation of the environment has put renewable energies among top priorities on development agendas. ❑ FCOR regional authorities along with French Secretary of State for the Outermost Regions (SEOM) have placed this sector among the 3 priority sectors to be developed. ❑ The FCORs benefit from natural endowments and access to European technologies to develop equipment to exploit virtually all forms of renewable energy: wind, sun, sea, biomass, etc ❑ The FCORs have the required technology especially through R&D infrastructures (technopoles and national/regional research centers) ❑ Regional authorities/organisations and national agencies are providing assistance to FCOR firms through funding and technical assistance for innovative projects in renewable energy, water, water sewage, waste treatment. ❑ The FCORs actually produce energy from different sources already: hydroelectricity, biocarburates, biomass, photovoltaic, etc.. ❑ New developments in this sector can benefit other sectors of activities: agro-processing, construction, tourism, etc
Educational Services: TVET, ELT	<ul style="list-style-type: none"> ❑ Public and private teaching institutions provide undergraduate and post-graduate quality teaching, as well as training activities for scholars and professionals in various areas of expertise. ❑ The FCORs have an educational landscape rich with many national research and technology centres.

Sector	Common reasons
	<ul style="list-style-type: none"> ❑ The University Antilles-Guyane has signed cooperation agreements with UWI (T&T, Jam) in Masters programmes. ❑ It is comparatively much cheaper than private Anglo-Saxon institutions. ❑ French speaking environment and language training attract international students willing to learn in a tropical environment. ❑ Caribbean neighbours can take advantage of the proximity
Health & Wellness	<ul style="list-style-type: none"> ❑ Increasing global demand for health and wellness and green nature. ❑ French know-how and technologies in activities related to health industries are renowned and the FCORs have access to this technology. ❑ The FCORs have exceptional natural endowments and need to develop the H&W and tourism infrastructure ❑ Niches: training and expertise (locally or abroad), welcoming foreign patients in specific medicine specialties ❑ Existing cooperative programs between the FCORs and Caribbean neighbours, such as Dominica, St Lucia and Haiti (taking care of Caribbean patients requiring advanced cures and treatment) ❑ Following recommendations issued by the French High Authority for Health, the CIDR has developed a new concept around dental surgery and implants: a dental implantology training centre operated by local professionals and open to Caribbean patients and practitioners.
Recreational, cultural and sporting services	<p>RECREATIONAL:</p> <ul style="list-style-type: none"> ❑ Enabling tax policy in the early 1990s encouraged the development of yachting activities ❑ Traditional yachting and sea-contests <p>CULTURE:</p> <ul style="list-style-type: none"> ❑ The FCOR movie industry has a few well-known actors and film-makers : Greg Germain and Christian Martial, actors and producers. Greg

Sector	Common reasons
	<p>Germain own in his own theatre in Avignon.</p> <ul style="list-style-type: none"> <input type="checkbox"/> The FCOR music industry has a few internationally-known artists and has access to European networks through France <p>SPORT:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Several athletes from the FCORs are also French National top athletes <input type="checkbox"/> The recently approved Plan Caraïbes of the <i>Fédération Française d'Athlétisme (FFA)</i> aims at developing local training capacities to allow FCOR best athletes to share their expertise locally and in the Caribbean region

Table 6.5: Differences & Similarities (CARIFORUM & FCOR) in Priority Sectors for Export

CARIFORUM Member States ONLY	CARIFORUM Member States & FCOR	FCOR ONLY
1. International Financial Services	1. Construction 2. Hotel & Restaurant Services 3. Tour Operator & Tour Guide Services 4. Educational Services: Technical & Vocational Services 5. Recreational, Cultural and Sporting Services 6. Legal Services 7. Health and Wellness 8. Agriculture, mining and manufacturing services 9. Management and Consulting services 10. Accounting, Auditing and Bookkeeping Services 11. Architectural, Engineering and Other Technical 12. Telecommunications Services 13. Agro-processing 14. Research and Development Services	1. Metals 2. Machinery - Electrical

6.3 Restrictions to Services Trade and Investment based on France's EPA Commitments

This section of the report examines France's EPA commitment in Services and Investment and identifies any restrictions that are important to CARIFORUM services exporters, especially in the priority sub-sectors outlined above.

The main restrictions are in the form of registration, licensing and qualifications. In terms of Investment/establishment there is often a maximum percentage of shareholding or voting rights and the maximum percentage is not always stated. In addition, for managerial positions, a CARIFORUM company establishing in the FCORs, has to verify that there are no nationals qualified to fill a position before a CARIFORUM person can fill such a position. In a few cases there are nationality requirements which restrict the activity to being performed only by a national unless special authority is granted.

The following matrix outlines the relevant restrictions (more details can be obtained from the Individual Country Reports). However, CARIFORUM services exporters are advised to examine these restrictions carefully as it relates to their industry and familiarize themselves with the French regulatory requirements before venturing into the FCORS.

Table 6.6: France's Restrictions under the EPA which may have implications for CARIFORUM Services Providers

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
Computer and related services	<ul style="list-style-type: none"> - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. 	<ul style="list-style-type: none"> • CARIFORUM Service Providers need to be aware of the maximum shareholding they could have in a company in this sector in France as they look at entering into joint ventures with nationals of the FCOR territories • CARIFORUM Service Providers need to find out what the registration, licensing and qualification requirements are. • A CARIFORUM National cannot assume a managerial position unless there are no suitably qualified nationals
Architectural & Engineering Services,	<ul style="list-style-type: none"> - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific 	<ul style="list-style-type: none"> • CARIFORUM Service Providers need to be aware of the maximum shareholding they could have in a

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
Construction Services	<p>authorization if not the holder of a residence permit.</p> <ul style="list-style-type: none"> - Limitations on the type of investment, e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements apply 	<p>company in this sector in France as they look at entering into joint ventures with nationals of the FCOR territories</p> <ul style="list-style-type: none"> • CARIFORUM Service Providers need to establish what the registration, licensing and qualification requirements are. • A CARIFORUM National cannot assume a managerial position in an Architectural, Engineering or Construction firm unless there are no suitably qualified nationals.
Education	<ul style="list-style-type: none"> - Primary, Secondary, Higher and Adult Education Services: Participation of private operators in the education network is subject to concession. - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Primary Education Services: Nationality condition applies however foreigners may obtain authorization from competent authorities to establish and direct an education institution and to teach - Secondary Education Services: Nationality condition applies however foreigners may obtain authorization from competent authorities to establish and direct an education institution and to teach; - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - Higher Education Services: Nationality condition applies however foreigners may obtain authorization from competent authorities to establish and direct an education institution and to teach; - University professors that qualify as Contractual Service Suppliers and have a contract in France can travel to to work as Professors - France: The temporary entry will be for a cumulative period not exceeding 9 months in France . - The professors must have obtained an 	<ul style="list-style-type: none"> - CARIFORUM Service Providers need to be aware of the maximum shareholding they could have in a company in this sector in France as they look at entering into joint ventures with nationals of the FCOR territories - A CARIFORUM National cannot assume a managerial position unless there are no suitably qualified nationals - CARIFORUM Service Providers require special authorization from the relevant competent authorities to establish and manage education institutions at the Primary, Secondary and High Education Levels. - CARIFORUM University professors who qualify as Contractual Service Providers and have an employment contract with a university in the FCOR are entitled to temporary entry for a cumulative period of 9 months during a 12- month period for the duration of the contract, under the following circumstances: <ul style="list-style-type: none"> o Economic needs test applies unless employed directly by the Minister in Charge o The Work Permit cannot exceed 9 months.

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
	<p>employment contract from a University or other higher education institution. Economic needs test applies unless those professors are designated directly by the Minister in charge of higher education. The work permit is delivered for a period not exceeding 9 months, renewable for the duration of the contract. The recruiting institution must pay a tax to the International Migration Office.</p>	
Financial Services	<ul style="list-style-type: none"> - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements apply - Banking and other financial services: Only firms having their registered office in Europe can act as depositories of the assets of investment funds. The establishment of a specialized management company, having its head office and registered office in the same Member State, is required to perform the activities of management of unit trusts and investment companies. - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - Insurance and insurance related services: For France, does not include: Direct insurance services and direct insurance intermediation services, except for insurance of risks relating to: <ul style="list-style-type: none"> • Maritime shipping and commercial aviation and space launching and freight (including satellites) with such insurance to cover any or all of the following: the goods being transported, the vehicle transporting the goods, and any liability arising therefrom; (ii) Goods in international transit - Insurance of risks relating to ground transport may be carried out only by insurance firms established in Europe. - Banking and other financial services: Does not include: provision of financial information and financial data processing, and for advisory and other auxiliary services excluding 	<ul style="list-style-type: none"> • CARIFORUM Service Providers need to be aware of the maximum shareholding they could have in a company in this sector in France as they look at entering into joint ventures with nationals of the FCOR territories • CARIFORUM Service Providers need to find out what the registration, licensing and qualification requirements are. • A CARIFORUM National cannot assume a managerial position in a Financial Institution unless there are no suitably qualified nationals. • A CARIFORUM offering banking and other financial services related to depositories of the assets of investment fund is required to have its registered office in Europe. • In order to provide services related to the management of unit trusts and investment companies, a CARIFORUM firm must establish a specialised management company with its head office and registered office in the same jurisdiction. • A CARIFORUM Insurance Service Provider will have to establish in Europe in order to provide insurance service

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
	intermediation for: France	
Health and Wellness	<ul style="list-style-type: none"> - Commitments apply only for privately funded services. Concessions are required. Economic needs test⁸⁶ may apply. Main criteria are number of and impacts on existing establishments, transport infrastructure, population density, geographic spread, and creation of new employment. - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements apply - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. 	<ul style="list-style-type: none"> - Cariforum services providers wishing to provide these services in the FCOR market need to understand that the economic needs test may apply. They would also have to meet the licensing and registration requirements. - CARIFORUM Service Providers need to find out what the registration, licensing and qualification requirements are. - CARIFORUM service providers must also know the restrictions relating to the type of investment and the filling of managerial positions as they may be required to form joint ventures with French nationals
Tourism and related services	<ul style="list-style-type: none"> - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements apply - Nationality condition: applies for tourist guide services in France. Nationality condition also applies for specialists and graduate trainees providing spa services - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - Chef de Cuisine: Advanced technical qualifications and at least 6 years of demonstrable work experience at the level of Chef de Cuisine may be required. Economic needs test applies. - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights 	<ul style="list-style-type: none"> - As a priority sector listed for ALL Cariforum member state, service providers wishing to offer tourism and related services in the FCOR must meet the licensing and registration requirements. • Tourist Guide Services and specialist and graduate trainees providing spa services are reserved for nationals of France. • CARIFORUM Service Providers need to be aware of the maximum shareholding they could have to offer tourism services in France as they look at entering into joint ventures with nationals of the FCOR territories • A CARIFORUM National cannot assume a managerial position unless there are no suitably qualified nationals available. - A CARIFORUM Chef de Cuisine will be required to have advanced technical qualifications and at least 6 years work experience at that level. Economic needs test applies.
Energy Services	<ul style="list-style-type: none"> - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding 	<ul style="list-style-type: none"> - Economic needs test applies for the Retail Sale of Energy

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
	<p>or voting rights</p> <ul style="list-style-type: none"> - Registration, licensing and qualification requirements apply - Wholesale Trade Services of Energy: Does not include wholesale trade services of electricity, steam and hot water. - Retailing Services of Motor Fuel: Does not include retailing services of motor fuel, electricity, (non-bottled) gas, steam and hot water. - Retail Sales of Energy: Economic needs test¹⁰⁸ applies for retail sales of fuel oil, bottled gas, coal and wood in department stores. The main criteria are number of and impact on existing stores, population density, geographic spread, impact on traffic conditions and creation of new employment. - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - Retail Sales of Energy does not include: <ul style="list-style-type: none"> - Retailing services of electricity, (non-bottled) gas, steam and hot water - Retail sales of fuel oil, bottled gas, coal and wood (except for mail order) 	<ul style="list-style-type: none"> - Registration, licensing and qualification requirements must be met by a CARIFORUM Service provider wishing to offer: <ul style="list-style-type: none"> - Wholesale Trader Services of Energy - Retailing Services of Motor Fuel - Retail Sales of Energy - A CARIFORUM National cannot assume a managerial position unless there are no suitably qualified nationals available.
Photographic, Packaging, Printing and Publishing, Duplication, and Telephone Answering Services	<ul style="list-style-type: none"> - Limitations on the type of investment, e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements apply - The managing director of an industrial, commercial or artisanal activity, if not holder of a residence permit, needs a specific authorization - Duplicating services: Nationality condition applies for specialists and graduate trainees 	<ul style="list-style-type: none"> - Cariforum service providers, (in particular -Trinidadians for whom printing and packaging is a priority area of investment) must ensure that they meet the registration, licensing and qualifications requirements. - Specialists and Graduate Trainees (Duplicating Services) positions are reserved for nationals - A Managing Director of an industrial, commercial or artisanal activity needs a residence permit or special authorisation.
Environmental Services	<ul style="list-style-type: none"> - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights. - Registration, licensing and qualification requirements apply in all EC countries. 	<ul style="list-style-type: none"> - Because adequate expertise on environmental services already exists in the FCOR, it is not anticipated that Cariforum service providers will establishing these types of services within the FCOR.

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
	<ul style="list-style-type: none"> - France: authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - 	<ul style="list-style-type: none"> • Nonetheless, if an organization from any CARIFORUM member state wishes to do so, that organization must : <ul style="list-style-type: none"> • be aware of the maximum shareholding they could have in a company in this sector in France as they look at entering into joint ventures with nationals of the FCOR territories • establish what the registration, licensing and qualification requirements are. • A CARIFORUM National cannot assume a managerial position unless there are no suitably qualified nationals.
Distribution Services	<ul style="list-style-type: none"> - Wholesale Trade Services: France: State monopoly on tobacco. Economic needs test applies to wholesale pharmacies. The main criteria are population and geographical density of existing pharmacies. - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Retailing Services: Economic needs test applies for authorization for department stores (in France, only for large stores). The main criteria are number of and impact on existing stores, population density, geographic spread, impact on traffic conditions, and creation of new employment. - Nationality condition applies for tobacconists (i.e. buraliste). - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - Opportunities to provide distribution services from their home country to consumers in all EC countries do not include: Chemical products, precious metals and stones in all EC countries; Commission agents' services for traders and brokers working in 17 markets of national interest on fresh food products; and wholesale of pharmaceuticals in France; Retailing services (except mail order) 	<ul style="list-style-type: none"> • CARIFORUM Service Providers need to be aware of the maximum shareholding they could have in a company in this sector in France as they look at entering into joint ventures with nationals of the FCOR territories • CARIFORUM Service Providers cannot establish wholesale trade services in tobacco because of the existence of a state monopoly • Economic needs test is a requirement for the establishment of a wholesale pharmacy • Economic needs test is a requirement for CARIFORUM Service providers wishing to establish a large department store in France • A CARIFORUM National cannot assume a managerial position unless there are no suitably qualified nationals.

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
Recreational, Cultural and Sporting services	<ul style="list-style-type: none"> - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements apply in all EC countries. - * News and Press Agency services: France: Foreign participation must not exceed 20% of the capital or of voting rights in French-language publications. Establishment of press agencies by Caribbean investors is subject to reciprocity. - France: authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - Qualifications and economic needs tests are required in France. The main criteria for the economic needs test will be the market conditions in the Member State including the number of, and impact on, existing service suppliers. 	<ul style="list-style-type: none"> - Cariforum service providers wishing to offer recreational, cultural and sporting services within the FCOR may be required to form joint ventures with local in order to qualify for market access and must bear in mind the maximum shareholding they could have as a foreign company. <ul style="list-style-type: none"> o CARIFORUM service providers are limited to 20% of a shareholding in a News and Press Agency o Establishment of press agencies by CARIFORUM agencies is based on reciprocity - Other conditions such as economic needs tests, qualification requirements must be met if a CARIFORUM service provider wants to offer recreational, cultural and sporting services - A CARIFORUM National cannot assume a managerial position unless there are no suitably qualified nationals.
Transport Services	<ul style="list-style-type: none"> - Maritime Transport: Does not include the establishment of a registered company for the purpose of operating a fleet under the national flag of the State in France; authorization required for feeding services France - Internal Waterways Transport: Measure based upon existing or future agreements on access to inland waterways (including agreements following the Rhine-Main-Danube link) reserve some traffic rights for operators based in the countries concerned and meeting nationality criteria regarding ownership. Regulations implementing the Mannheim Convention on Rhine Shipping apply. - Does not include the establishment of a registered company for the purpose of operating a fleet under the national flag of the State of establishment in France - Limitations on the type of investment e.g. a maximum percentage for foreign shareholding or voting rights - Registration, licensing and qualification requirements apply 	<ul style="list-style-type: none"> - There are numerous restrictions which a CARIFORUM Service Provider desirous of providing transport service will face in the FCORs: <ul style="list-style-type: none"> o With respect to Maritime Transport, a CARIFORUM National cannot establish a registered company for the purpose of operating a fleet under the national flag of France; will have to be authorised to offer feeding service and there is a French nationality requirement for ships' crew. o Nationality requirement as it relates to the provision of internal waterways transport o Registration, licensing and qualification requirements must be met o CARIFORUM Service Providers are subject to a maximum shareholding in a company in this sector if they enter into joint

Sector	France's Restrictions	Main Implications for CARIFORUM Countries
	<ul style="list-style-type: none"> - Road Transport: Passenger Transportation: All EC countries: Foreign investors cannot provide transport services within a Member State, except for rental of non-scheduled services of buses with operator. <ul style="list-style-type: none"> o Economic needs test applies for taxi services. The main criteria are number of and impact on existing establishments, population density, geographic spread, impact on traffic conditions and creation of new employment. o France: Does not include intercity bussing services. - Maritime Transport: Nationality condition applies for ships' crews. - Authorization for foreign managers takes into consideration the availability of local managers. The managing director needs specific authorization if not the holder of a residence permit. - 	<ul style="list-style-type: none"> ventures with nationals of the FCOR territories <ul style="list-style-type: none"> o A CARIFORUM Service Provider cannot provide road transport services with the exception of the rental of non-scheduled services of buses with operator o Economic needs test is a requirement in the case of taxi services o A CARIFORUM Service Provider cannot offer intercity bussing services -
Other services	<ul style="list-style-type: none"> - <i>Hairdressing, cosmetic treatment, manicure and pedicure, and other beauty treatment services</i> <ul style="list-style-type: none"> o Limitations on the type of investment, e.g. a maximum percentage for foreign shareholding or voting rights - <i>Washing, cleaning, and dyeing services</i> <ul style="list-style-type: none"> o Nationality condition applies for specialists and graduate trainees. - <i>Hairdressing, cosmetic treatment, manicure and pedicure, and other beauty treatment services</i> <ul style="list-style-type: none"> o Nationality condition applies for specialists and graduate trainees the managing director of an industrial, commercial or artisanal activity, if not holder of a residence permit, needs a specific authorization. 	<ul style="list-style-type: none"> - CARIFORUM service providers wishing to offer hairdressing, cosmetic treatment, manicure and pedicure and other beauty treatment services are limited to a maximum percentage of shareholding if they pursue a joint venture with nationals of France. - A CARIFORUM National cannot operate as a specialist or graduate trainee in this sector - Specific authorization is required for a CARIFORUM National in the position of a Managing Director

7.0 Barriers to Trade

7.1 Barriers to Trade for CARIFORUM Exporters

The following table presents barriers to trade for CARIFORUM exporters as identified during the country field visits. In some cases the barriers to trade are common to all CARIFORUM countries while in others they are specific to certain countries. More details are provided in the Individual country reports.

The table shows that the restrictions/barriers common across CARIFORUM countries are: Language, Transportation availability and cost, EU Regulations & Standards, Duties (Octroi de Mer), Lack of on the ground representation in FCOR, Labelling in French, Mutual recognition for professionals, Licensing requirements/bureaucracy, Limited knowledge of market conditions/Lack of information.

Table 7.1: Barriers to Trade for CARIFORUM Exporters

Barrier (real or perceived)	ANT	BAR	DOM	DR	JAM	SLU	SVG	SUR	T&T
Language	*	*	*	*	*	*	*	*	*
Transportation availability & cost	*	*	*	*	*	*	*	*	*
EU Regulations & Standards	*	*	*	*	*	*	*	*	*
Duties (Octroi de Mer)	*	*	*	*	*	*	*	*	*
Lack of on the ground representation in FCOR	*	*	*	*	*	*	*	*	*
Labelling in French	*	*	*	*	*	*	*	*	*
Mutual recognition for professionals	*	*	*	*	*	*	*	*	*
Licensing requirements/bureaucracy	*	*	*	*	*	*	*	*	*
Limited knowledge of market conditions/Lack of information	*	*	*	*	*	*	*	*	*
Differences in legal systems and trade legislation	*	*	*		*	*	*	*	*
Visa and associated entry requirements (insurance, etc)			*	*	*	*	*	*	
Funding for exporters	*		*		*	*	*		
Merchant accounts to trade in Euros not domestically available	*		*			*	*		
Concerns with FCOR companies paying on time			*				*		
Inadequate domestic collaboration	*		*	*	*	*	*		*
Non-tariff/Technical barriers	*		*					*	*
Concern over preference for French products		*				*	*		*
Cultural divergence		*							
Exchange controls		*							
Domestic value added tax							*		
Export market dominated by large companies									*

Source: Field work, survey of private and public institutions on the ground in CARIFORUM countries

7.2 Barriers to trade identified by FCOR exporters

In a similar fashion, the following table presents barriers to trade for FCORs exporters as identified during the country field visits. More details are provided in the Individual country reports.

Table 7.2: Barriers to trade identified by FCOR exporters

Barrier (real or perceived)	FG	GPE	MQ
Language	*	*	*
Transportation availability and cost	*	*	*
CARIFORUM Regulations & Standards	*		
Differences in legal systems and trade legislation	*	*	*
Duties	*	*	*
Lack of on the ground representation in CARIFORUM ²⁵	*	*	*
Mutual recognition for professionals	*	*	*
Licensing requirements/bureaucracy	*	*	*
Limited knowledge of market conditions/Lack of information	*	*	*
Visa and associated entry requirements (insurance, etc)			
(Private) funding for exporters	*	*	*
Concerns with CARIFORUM companies paying on time	*	*	*
Inadequate domestic collaboration			*
Non-tariff/Technical barriers	*	*	*
Cultural divergence	*	*	*
Exchange controls		*	
Domestic value added tax		*	*
Export market dominated by large companies			
Domestic social conflicts	*	* ²⁶	*

Table 7.3: Overcoming Barriers (real or perceived) - CARIFORUM & FCOR

Barrier (real or perceived)	Suggested ways to overcome Barrier
Language	CARIFORUM & FCOR BSOs to devise strategies to facilitate language training to support trade. This can be done through each island's official investment authority of export association
Transportation availability and cost	Regional and national governments and private sector need to come together to discuss creative ways of making regional transportation more available and economical by combining resources to provide such transportation or guaranteeing loans and helping to devise plans so that the private sector can provide the services.
EU Regulations & Standards	Increased capacity of CARIFORUM BSOs and national

²⁵ Martinique export promotion officers located in Trinidad & Tobago, Barbados and Dominican Republic therefore have a key role to play.

²⁶ Guadeloupe authorities and professional organizations generally preserve port activities during conflicts

Barrier (real or perceived)	Suggested ways to overcome Barrier
	bureaus of standards and testing facilities to meet EU/French standards
Duties (Octroi de Mer)	CARIFORUM & FCOR Governments to engage in negotiations aimed at reducing the duties on industries identified by exporters as "Opportunity Industries".
Lack of on the ground representation in FCOR	CARIFORUM & FCOR BSOs to develop an information portal with the areas of specialization and contact details of representatives who are willing to work with CARIFORUM services providers and vice versa (this can be placed on the website of each country's the investment authority)
Labelling in French	CARIFORUM exporters should work with FCOR BSOs, other knowledgeable CARICFORUM exporters, and other relevant agencies to develop their capacity to label in French. This could be facilitated by Caribbean Export.
Mutual recognition for professionals	CARIFORUM & FCOR professional associations/bodies in their respective territories should jointly develop and engage in the negotiations of mutual recognition arrangements for the purpose of authorization, licensing and certification of exporters/investors and service suppliers, in particular, in the professional services sectors. The outcome of this process should then be Aligned with the Mutual Agreement Negotiations taking place between CARIFORUM and the EU under the EPA.
Licensing requirements/bureaucracy	CARIFORUM & FCOR BSOs after consultations with Local stakeholders/exporters should initiate market access discussions (as it relates to licensing and authorization) Wherein both parties are mandated to develop common licensing or Certification agreements to facilitate smooth trade between the two
Limited knowledge of market conditions/Lack of information	Provision of information booklets CARIFORUM and FCOR Official Investment Authorities – with updated market trends, products, suppliers, etc.
Differences in legal systems and trade legislation	The relevant legal units at the regional and national levels need to meet to address all areas of the respective legal systems that need to be harmonized to facilitate trade.
Visa and associated entry requirements (insurance, etc)	The relevant authorities from CARIFORUM and the FCORs need to meet to remove visa and other entry requirements that act as barriers to trade
Funding for exporters	Development of a regional exporting fund specific to facilitating increased export between CARIFORUM and FCOR
Merchant accounts to trade in Euros not domestically available	The relevant authorities from CARIFORUM and the FCORs should meet and find an efficient approach to addressing this issue.
Concerns with FCOR/CARIFORUM	CARIFORUM & FCOR buyers must negotiate payment

Barrier (real or perceived)	Suggested ways to overcome Barrier
companies paying on time	terms which are favourable to both parties. If necessary, a reasonable penalty can be imposed if payment terms are not met. Some court of agency would be required to address and make rulings on such complaints.
Inadequate domestic collaboration	Caribbean Export needs to work with national associations and agencies to promote the benefits of greater collaboration.
Non-tariff/Technical barriers	CARIFORUM & FCOR to arrive at an agreements which properly addresses the various technical barriers to trade- whether bureaucratic or legal issues that involve hindrances to trade
Concern over preference for French products	Launch a joint CARIFORUM-FCOR campaign promoting regional products
Cultural divergence	CARIFORUM & FCOR BSOs can organize cultural exchange programmes –organization of trade missions in which cultural awareness is a key area covered
Exchange controls	
Domestic value added tax	
Export market dominated by large companies	

8.0 Transportation Options between CARIFORUM Countries and the FCORs: Barrier or not?

(BSOs need to advise those companies to work with other companies to fill containers and how to reduce costs)
This Chapter, through the use of maps and tables, shows the transportation options which are available between CARIFORUM countries and the FCORs. This is critical to the study because there is a perception that there is insufficient transportation access between the CARIFORUM countries and the FCORs and there is the recognition that transportation is critical to trade. The Table below shows that there are several air transport options as well as shipping options, however in the case of shipping, access in some instances could be better. The table does not contain information on the Bahamas, Belize and Haiti.

With respect to shipping, the options identified in Table 1 are the CMA GGM Container Shipping Group, the CAGEMA Inter Island Service, and the Ferry Service Express des Iles. The airlines which provide direct air access between the CARIFORUM countries and the FCORs are LIAT, Air Caraibes and Air France,

Table 8.1: Transportation Options (Shipping and Air) between each CARIFORUM country and each FCOR

Shipping Options to FCORs				Airline Options to FCORs			
From CARIFORUM	Guadeloupe	Martinique	French Guyana	Country	Guadeloupe	Martinique	French Guyana
Antigua & Barbuda	-	CAGEMA Inter Island Service	-	Antigua & Barbuda	LIAT (DIRECT)	LIAT with connection in St. Lucia	Connection on Air France or Air Caraibes in Guadeloupe or Martinique
Barbados	-	-	-	Barbados	LIAT with connection in Dominica or Antigua (4	LIAT via St. Lucia	Connection on Air France or Air Caraibes in

Shipping Options to FCORs				Airline Options to FCORs			
From CARIFORUM	Guadeloupe	Martinique	French Guyana	Country	Guadeloupe	Martinique	French Guyana
					days/week)		Guadeloupe or Martinique
Dominica	L'Express des Iles (Ferry)	CAGEMA Inter Island Service/L'Express des Iles	-	Dominica	LIAT (DIRECT 6 days/week) or with connection in Antigua (4 days/week)	LIAT via St. Lucia (next day service)	Connection on Air France or Air Caraibes in Guadeloupe or Martinique
Dominican Republic	-	CAGEMA Main Liner	-	Dominican Republic	Air France once weekly; Air Caraibes (direct daily) and LIAT with connections in Antigua (4 days/week) and Dominica (6 days/week)	Air France (direct once weekly); Air Caraibes (direct daily) and LIAT with connections in Antigua and St. Lucia (overnight);	Air France (once weekly) & Air Caraibes daily
Grenada	-	CAGEMA Inter Island Service;	-	Grenada	LIAT with connections in Antigua (4 days/week)	LIAT with connection in Barbados	Connection on Air France or Air Caraibes in Guadeloupe or Martinique

Shipping Options to FCORs				Airline Options to FCORs			
From CARIFORUM	Guadeloupe	Martinique	French Guyana	Country	Guadeloupe	Martinique	French Guyana
Guyana	CMA-CGM's Guyanas Caribbean	CMA-CGM's Guyanas Caribbean	CMA-CGM's Guyanas Caribbean	Guyana	LIAT with connections in Barbados and Dominica (6 days/week)	LIAT with overnight connection in Barbados	Connection on Air France or Air Caraibes in Guadeloupe or Martinique
Jamaica	-	CAGEMA Main Liner	-	Jamaica	Caribbean Airlines to Antigua or St. Maarten with next day LIAT connection via Antigua (4 days/week)	Caribbean Airlines to Barbados with next day LIAT connection	Connection on Air France or Air Caraibes in Guadeloupe or Martinique
St Kitts & Nevis	CMA-CGM's Leeward Islands	-	-	St Kitts & Nevis	LIAT with connections in Antigua (4 days/week) and Antigua and Dominica (6 days/week)	LIAT with connections in Antigua and overnight connection in St. Lucia	Connection on Air France or Air Caraibes in Guadeloupe or Martinique
St. Lucia	L'Express des Iles (Ferry)	CAGEMA Inter Island Service; L'Express des Iles (Ferry)	-	St. Lucia	LIAT via Antigua (4 days/week) & Air Caraibes daily	LIAT daily and Air Caraibes daily	Connection on Air France or Air Caraibes in Guadeloupe or

Shipping Options to FCORs				Airline Options to FCORs			
From CARIFORUM	Guadeloupe	Martinique	French Guyana	Country	Guadeloupe	Martinique	French Guyana
							Martinique
St. Vincent & Grenadines	-	CAGEMA Inter Island Service; Express des Iles (Ferry)	-	St. Vincent & the Grenadines	LIAT with connections in Antigua (4 days/week) and Barbados and Dominica (4 days/week)	LIAT with daily connection in Barbados	Connection on Air France or Air Caraibes in Guadeloupe or Martinique
Suriname	CMA-CGM's Guyanas Caribbean	CMA-CGM's Guyanas Caribbean	CMA-CGM's Guyanas Caribbean	Suriname	Caribbean Airlines or Surinam Airways to POS (overnight) with LIAT connections to Barbados and Antigua (4 days/week)	Caribbean Airlines or Surinam Airways to POS (overnight) with LIAT connections to Barbados or St. Lucia	By Road/Ferry

Shipping Options to FCORs				Airline Options to FCORs			
From CARIFORUM	Guadeloupe	Martinique	French Guyana	Country	Guadeloupe	Martinique	French Guyana
Trinidad & Tobago	CMA-CGM's Guyanas Caribbean & Caribbean Brazil	CAGEMA Inter Island Service & CMA-CGM's Guyanas Caribbean	CMA-CGM's Guyanas Caribbean	Trinidad & Tobago	LIAT with connections in Barbados and Antigua (4 days/week)	LIAT with daily connection in Barbados or St. Lucia	Connection on Air France or Air Caraibes in Guadeloupe or Martinique

Summary of Table 8.1:

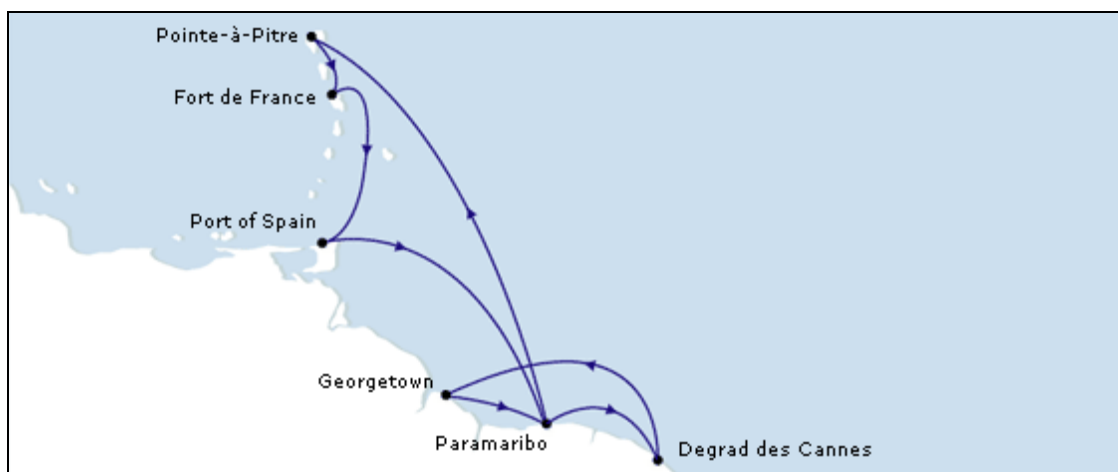
Shipping

- All the CARIFORUM countries can get their goods directly to Martinique (with the exception of Barbados and St. Kitts and Nevis) within 1 to 6 days
- The following CARIFORUM countries can get their goods to the other 2 FCORs with Trinidad and Tobago acting as a transshipment point: Jamaica, the Dominican Republic, Antigua and Barbuda, St. Lucia, Dominica, St. Vincent and the Grenadines, Barbados and Grenada. It is difficult to estimate the transit time in these instances.
- Suppliers in St. Kitts and Nevis can get their goods to Guadeloupe on the same day
- Guadeloupe is a transshipment point for goods from St. Kitts and Nevis destined to Martinique and French Guyana,
- Guyana, Suriname and Trinidad and Tobago can get their goods directly to all CFORs within 1 to 13 days.
- Trinidad and Tobago has multiple access to all the FCORs
- St. Lucia and Dominica have access to Martinique and Guadeloupe via a Ferry Service, L'Express des Iles on a daily basis

Airlines

- With the exception of the Dominican Republic, all the other CARIFORUM countries access French Guyana via Guadeloupe or Martinique on Air France or Air Caraïbes.
 - French Guyana is accessed directly from the Dominican Republic through Air France once weekly and Air Caraïbes daily.
 - Surinamese are better off accessing French Guyana by road and ferry
- St. Lucia has the most access to Martinique, namely through:
 - One daily flight (LIAT) from Barbados via St. Lucia
 - One daily flight (Air Caraïbes)
- The Dominican Republic has access to both Martinique and Guadeloupe through:
 - One daily flight (Air Caraïbes)
 - Once weekly flight (Air France)
- Barbados has daily access to Martinique through LIAT
- All the other CARIFORUM countries access Martinique via Barbados or St. Lucia on the LIAT airlines
- LIAT has direct flights to Guadeloupe from:
 - Antigua (4 times weekly)
 - Dominica (6 times weekly)
- All the other CARIFORUM countries with the exception of the Dominican Republic have access to Guadeloupe via Antigua or Dominica

Map 1: CMA CGM Shipping Route between the Guianas, Trinidad and the French Caribbean



The map above shows the shipping route with three CARIFORUM Member States - Trinidad and Tobago, Guyana and Suriname and the FCORs.

Table 2 below shows the transit time between the different ports. The following are things of interest to be note as far as transportation is concerned between the three CARIFORUM countries and the FCORs.

Table 8.2: Transit time between the different ports

Port	Transit Time
POINTE A PITRE , GP	0
FORT DE FRANCE , MQ	1
PORT OF SPAIN , TT	1
PARAMARIBO, SR	4
DEGRAD DES CANNES , GF	6
GEORGETOWN, GY	8
PARAMARIBO, SR	9
POINTE A PITRE , GP	13

- Suppliers in Suriname can have their goods in French Guiana in 2 days; Guadeloupe in 4 days and in Martinique in 5 days
- A supplier in Guyana can have his/her supplies in Guadeloupe in 5 days, Martinique in 6 days and French Guyana in 13 days.
- Suppliers in Trinidad and Tobago can have their goods in French Guiana in 5 days and in Guadeloupe in 12 days.

Map 2: the CAGEMA's Inter island Service



The map shows above shows the shipping route with six (6) CARIFORUM Member States and one state of the FCOR, Martinique.

Table 3 below shows the weekly turn around shipping time between Martinique and Dominica, Antigua and Barbuda. St. Lucia (Vieux Fort), Trinidad and Tobago (Port of Spain and Point Lisas), Grenada, St. Vincent and the Grenadines, St. Lucia (Castries) and back to Martinique.

Table 8.3: Weekly turn around shipping time

Port	Transit Time
FORT DE FRANCE , MQ	0
ROSEAU, DM	1
ST JOHN S , AG	1
VIEUX FORT , LC	2
PORT OF SPAIN , TT	3
POINT LISAS , TT	4
SAINT GEORGE S , GD	5
CAMPDEN PARK , VC	5
CASTRIES, LC	6
FORT DE FRANCE , MQ	

- Suppliers in Dominica and Antigua and Barbuda can have their goods in Martinique in 6 days
- A Supplier in St. Lucia can have his/her goods in Martinique in either 4 days or 1 day depending on which side of the island he/she is shipping from
- Suppliers in Trinidad and Tobago can have their goods in Martinique in 4 days
- Suppliers in Grenada and St. Vincent and the Grenadines can have their goods in Martinique in 2 days

Map 3: CAGEMA's Main Liner



This map above shows a shipping route which includes the following four (4) CARIFORUM States: Jamaica, Dominican Republic, Barbados and Trinidad and Tobago and one FCOR, Martinique.

Table 8.4: Shipment of goods from the CARIFORUM Member States to Martinique

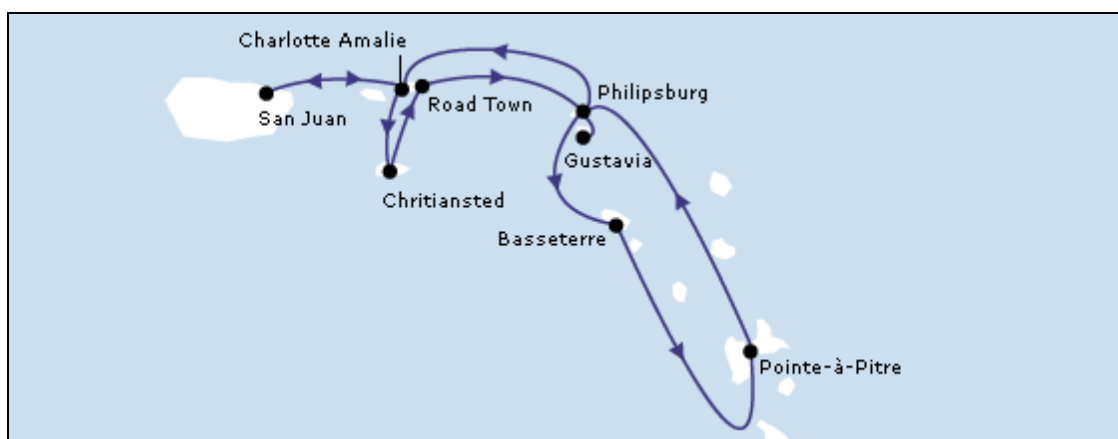
South Bound		North Bound	
Port	Transit Time	Port	Transit Time
SAVANNAH, US	0	RIO HAINA , DO	6
MIAMI, US	1	SAN JUAN , PR	7
KINGSTON, JM	4	PHILIPSBURG, AN	8
RIO HAINA , DO	6	FORT DE FRANCE , MQ	9
		BRIDGETOWN, BB	10
		CASTRIES, LC	10
		PORT OF SPAIN , TT	11
		ORANJESTAD, AW	13
		EL GUAMACHE , VE	13
		SAVANNAH, US	20

The Table above show the following as it relates to the shipment of goods from the CARIFORUM Member States to Martinique:

- A Supplier from Jamaica can have his/her goods in Martinique in 5 days
- The Dominican Republic Supplier can have his/her goods in Martinique in 3 days.
- The countries which do not have direct links to Guadeloupe, for example, Barbados, Jamaica, the Dominican Republic, Antigua and Barbuda, St. Lucia, St. Vincent and the Grenadines, Grenada need to get their goods to Trinidad and Tobago for transhipment to Guadeloupe

- Countries which do not have direct links to Martinique, for example Barbados, needs to get its goods to Trinidad and Tobago for transshipment to Martinique
- Countries which do not have direct links to French Guyana such as Jamaica, Dominican Republic, Antigua and Barbuda, St. Lucia, St. Vincent and the Grenadines, Grenada and Barbados need to get their goods to Trinidad and Tobago for transshipment to French Guyana

Map 4: CMA CGM's Leeward Islands



The Map and the Table below show that suppliers in St. Kitts and Nevis can get their goods to Guadeloupe in record time ... on the same day.

Table 8.5: Transporting goods from St. Kitts & Nevis to Guadeloupe

Port	Transit Time
PHILIPSBURG, AN	0
CHARLOTTE AMALIE , VI	1
SAN JUAN , PR	1
CHARLOTTE AMALIE , VI	2
CHRISTIANSTED St Croix , VI	2
ROAD TOWN , VG	3
PHILIPSBURG, AN	3
BASSETERRE, KN	4
POINTE A PITRE , GP	4
PHILIPSBURG, AN	6
GUSTAVIA St Barthelemy , GP	6
PHILIPSBURG, AN	7

Map 5: Caribbean – North Brazil



Table 8.6: Transporting goods from Trinidad & Tobago to Guadeloupe

South Bound

Port	Transit Time
PUNTA MANZANILLO , PA	0
PORT OF SPAIN , TT	4
MANAUS, BR	11

North Bound

Port	Transit Time
MANAUS, BR	11
SANTAREM, BR	14
BELEM, BR	16
PORT OF SPAIN , TT	21
POINTE A PITRE , GP	23
CRISTOBAL, PA	27
PUNTA MANZANILLO , PA	27

- The map and tables above show that on this line, Caribbean – North Brazil, suppliers in Trinidad and Tobago have a quicker method of getting their supplies to Guadeloupe with a transit time of 2 days. This transit time is significantly better than the turn around time of 12 days on the Line feeding the Guianas, Trinidad and the French Caribbean as shown in Table 2 above.

9.0 The Ease of Doing Business in CARIFORUM and the FCORs

This Chapter examines the ease of doing business in CARIFORUM countries compared to France/FCORs based on the World Banks 2009 assessment. The criteria used by the World Bank to assess the ease of doing business in countries around the World are the following:²⁷

- Starting a Business
- Dealing with Construction Permits
- Employing Workers
- Registering Property
- Getting Credit
- Protecting Investors
- Paying Taxes
- Trading Across Borders
- Enforcing Contracts
- Closing a Business

The table below shows that France ranks 31st in the World in terms of the ease of doing business. However, this ranking is still above all CARIFORUM countries. St. Lucia (36th) is the highest ranked CARIFORUM country. Trinidad & Tobago ranks 81st and Jamaica 75th, and the Dominican Republic 86th.

Apart from the criteria of “dealing with construction permits” (for SVG, SLU and Belize); CARIFORUM countries failed to excel in any of the above criteria and fell in the middle of the group of the 183 countries assessed. CARIFORUM countries need to make an effort to increase their rankings because potential investors may use these as a factor when making investment decisions.

However, in terms of comparing CARIFORUM with the FCORs, CARIFORUM’s performance is not too far below that of France/FCORs which suggests that there is also a certain level of difficulty in doing business in France/FCORs.

²⁷ No rating could be found for Barbados

Table 9.1: The Ease of Doing Business in CARIFORUM versus the FCORs Based on World Bank Ratings 2009

Economy	Ease of Doing Business Rank World Ranking	Starting a Business	Dealing with Construction Permits	Employing Workers	Registering Property	Getting Credit	Protecting Investors	Paying Taxes	Trading Across Borders	Enforcing Contracts	Closing a Business
Singapore	1	4	2	1	16	4	2	5	1	13	2
United States	4	8	25	1	12	4	5	61	18	8	15
United Kingdom	5	16	16	35	23	2	10	16	16	23	9
Canada	8	2	29	17	35	30	5	28	38	58	4
France	31	22	17	155	159	43	73	59	25	6	42
St. Lucia	36	36	12	20	76	87	27	40	103	165	47
Antigua and Barbuda	50	59	21	54	103	113	27	128	53	71	64
Bahamas	68	61	100	42	149	71	109	42	37	120	31
St. Vincent and the Grenadines	70	45	3	57	137	87	27	62	52	102	183
Jamaica	75	19	49	39	122	87	73	174	104	128	23
St. Kitts and Nevis	76	86	8	19	153	87	27	100	53	114	183
Belize	80	147	4	23	128	87	119	57	117	168	25
Trinidad and Tobago	81	65	82	45	170	30	20	56	49	169	183
Dominica	83	38	27	80	113	71	27	68	86	167	183
Dominican Republic	86	107	92	97	112	71	57	70	36	86	146
Grenada	91	52	15	49	162	87	27	82	79	162	183
Guyana	101	97	39	87	72	150	73	113	76	75	129

Source: The World Bank Doing Business Project, 2009

10.0 Recommendations to Governments to create an Improved Trade Environment

This chapter provides a summary of recommendations derived from field interviews and Focus Groups. Participants felt that these recommendations would assist in increasing trade between their country/territory and the FCORs. The recommendations are separated into those for CARIFORUM Governments and those for FCORs. More elaborate coverage is provided in the Individual Reports in Volume 2.

For both CARIFORUM countries and the FCORs, the recommendations that were most frequently made include:

- Establishment of a BSO in the FCORs to assist CARIFORUM exporters
- Facilitating arrangements to get testing facilities and laboratories certified to French /EU standards (including the strengthening of Bureaux of Standards)
- Improved transportation and a transportation support strategy which fosters collaboration with small operators
- Facilitation of local collaboration in order to develop critical mass and foster exchange of ideas
- French language training and a language policy to support trade
- Information portal on opportunities and regulations in the FCORs and the CARIFORUM
- Strengthening of Coalition of Services Providers
- More enabling environment for agriculture

Another recommendation addressed specifically to the FCORs authorities is the establishment of mechanisms to measure and study trade taking place in the services sector, along with a follow-up of the impact of the EPA in general.

A more detailed coverage is provided in the following tables. The asterisks in the following tables indicate where recommendations apply to a particular country/Territory and the reader is advised to visit the individual country for greater detail.

10.1 Recommendations to Governments by Country

Table 10.1: Recommendations to Governments by Country

Recommendation	ANT	BAR	DOM	DR	JAM	SLU	SVG	SUR	T&T
Government loan guarantee programmes	*								
More enabling environment for agriculture	*		*	*					

Recommendation	ANT	BAR	DOM	DR	JAM	SLU	SVG	SUR	T&T
Increased capacity of bureau of standards and testing facilities	*		*	*					
Trade Missions	*		*						
Improved transportation	*		*	*					
Incentives to SMEs	*		*						
Promotion of successful business models	*		*						
Facilitation of local Collaboration	*		*	*					
Exchange Programmes		*							
Disaster Management Programmes		*							
Creative Industries		*							
Increase speed of issuing work permits to French Interns		*							
French language training		*	*	*					
Strategic agricultural production		*	*						
Co-operation between Universities of CARIFORUM and those in FCORs		*		*					
Caribbean English or Spanish TV Channel in FCORs		*		*					
Establish BSO in FCORs to assist CARIFORUM exporters				*		*			
Information portal on opportunities in FCORs			*	*		*			
Testing facilities to meet EU standards			*	*		*			
Language policy to support trade			*	*		*			
Transportation support strategy			*	*		*			
Facilities to promote local collaboration in order to develop critical mass			*			*			
Incentives for producers							*		
Business Development			*				*		

Recommendation	ANT	BAR	DOM	DR	JAM	SLU	SVG	SUR	T&T
fund									
Collaboration with small transport providers			*	*			*		
Coordinate cluster shipping (consolidation)			*				*		
Impact of VAT and other domestic taxes							*		
Incentives for private sector groups to assist each other			*				*		
Conversion of banana lands into other export crops							*		
Strengthening of Coalition of Services Providers			*	*			*		
Selecting and coordinating successful SMEs for export							*		
Developing a regional transportation system			*	*				*	
Facilitating arrangements to get testing facilities and laboratories certified to French /EU standards			*	*				*	
Establishing closer bilateral links with French Guiana respect to trade								*	
More incentives (fiscal) should be made available to exporters									*
Trade Missions should be organised in light of the EPA									*
Harmonization of intellectual property rights									

10.2 Recommendations to FCORs regional authorities

Table 10.2 : Recommendations to FCORs Regional Authorities

Recommendation	FG	GPE	MQ
Government loan guarantee programmes		*	*
More enabling environment for agriculture	*		*
Increased capacity of bureau of standards and testing facilities	*		
Trade Missions		*	*
Improved transportation	*	*	*
Incentives to SMEs	*	*	*
Promotion of successful business models	*	*	*
Facilitation of local Collaboration		*	*
Exchange Programmes		*	*
Disaster Management Programmes	*	*	*
Creative Industries		*	*
Strategic agricultural production	*	*	*
Co-operation between Universities of CARIFORUM and those in FCORs	*	*	*
Caribbean English or Spanish TV Channel in FCORs	*	*	*
Establish CARIFORUM BSO in FCORs		*	*
Information portal on opportunities in CARIFORUM	*	*	*
Language policy to support trade	*	*	*
Transportation support strategy	*	*	*
Facilities to promote local collaboration in order to develop critical mass	*	*	*
Incentives for exporters	*	*	*
Regional Business Development fund	*	*	*
Collaboration with small transport providers		*	*
Coordinate cluster shipping (consolidation)	*	*	*
Impact of VAT and other domestic taxes	*	*	*
Incentives for private sector groups to assist each other	*	*	*
Conversion of banana lands into other export crops	*	*	*
Strengthening of Coalition of Services Providers	*	*	*
Selecting and coordinating successful SMEs for export	*	*	*
More incentives (fiscal) should be made available to exporters	*	*	*
Trade Missions should be organised in light of the EPA	*	*	*
Developing a regional transportation system	*	*	*

10.3 Distribution Services

Distribution services are very important and go to the heart of trade in goods. It is very important to understand how CARIFORUM exporters get their goods into the markets/onto the shelves of FCOR supermarkets and stores. Table 6 in Section 6.1 outlines France's restrictions with respect to distribution services as far as the EPA is concerned. There are a few restrictions on distribution but nothing significant, the restrictions mainly apply to:

- The distribution of tobacco
- Distribution of chemicals
- Setting up pharmacies (economic needs test)
- Hiring of foreign managers (need to ensure there are no locals first in some categories)

This leaves ample scope for CARIFORUM service providers to offer distribution services by all modes.

For some useful guidelines and information on distribution in Martinique and Guadeloupe see "Martinique and Guadeloupe: Export Guide to the Consumer Food Market, September 1997, Prepared for the U.S. Department of Agriculture by Fintrac Inc. This can be found at www.cbato.fas.usda.gov/Guadeloupe.doc. *An important statement from the above reference document is:*

"Wholesalers and distributors are key to entering the Guadeloupe and Martinique food markets. They are the only companies with the capacity to directly import food products from sources other than France. They are also the only players that might be interested in pursuing alternative sources of supply and in promoting new products in the marketplace. "

There are successful CARIFORUM companies exporting to the FCORs. From looking at the website of a successful St. Lucian food distributor which has penetrated the FCOR market, one can see the importance of distributors. The company exports to North America, the EU and all over the Caribbean and has at least 12 distributors (one for each country). The company has a distributor in Martinique as well as one in France and even in St. Martin. The importance of distributors is underscored by this company's distribution strategy/network.

This company also distributes under private and contract labelling. Private label products are typically those manufactured or provided by one company for offer under another company's brand. Contract labelled products are those in which the formulations are supplied by one individual or company and manufactured by another for offer under the formulation's owner brand. This company currently produces a range of private/contract packaged products for various customers and currently satisfies the needs of customers in the United States & British Virgin Islands, Dominica, St. Marteen, St. Martin, Martinique, Puerto Rico amongst others.

APPENDIX I(a):

Questionnaire - Public and Private Sector²⁸

In October 2008, 15 CARIFORUM countries and the European Union signed the Economic Partnership Agreement (EPA) establishing new grounds for trading relationships in the region.

This questionnaire is part of a study undertaken for the Caribbean Export Development Agency and the CARIFORUM/OCT/FCORs Task Force on Trade and Investment. The aim of this study is to identify new trading opportunities between CARIFORUM and the French Caribbean Outermost Regions.

Please take a few minutes to fill it in: the result and the relevance of this study depend on your participation. Many thanks in advance!

***: Required**

Contact details

1. Your name

2. Position in the organization

3. Years in this position

Description of Activities

4. Type of organization *

☐ GA: Government Agency ☐ BSO: Business Support Organization ☐ Private Sector Co

5. Your country *

6. Name of Organization *

7. Functions and activities? *

8. Organization size

1-10 11-20 21-30 31-40 40>

²⁸ A French version of this questionnaire was delivered in the FCORs and a Spanish version in the Dominican Republic

	1-10	11-20	21-30	31-40	40>
Number of employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Please indicate your annual budget

<50,000	50,000- 100,000 /	100,000- 300,000	300,000- 500,000 /	> 500,000
---------	----------------------	---------------------	-----------------------	-----------

10. How would you rate your organization's awareness of the EPA?

1 2 3 4 5

unaware ☐ ☐ ☐ ☐ ☐ very aware

Trading opportunities

11. What are the current main markets for your exports or those of your members?

12. Do you or any of your members trade with the following FCORs? (YES/NO)

Guadeloupe, French Guiana, Martinique

French Guiana

If so, please indicate for what industries

Guadeloupe

If so, please indicate for what industries

Martinique

If so, please indicate for what industries

13. Do you or any of your members trade with CARIFORUM countries? (YES/NO)

CARIFORUM COUNTRIES: Antigua & Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St Kitts & Nevis, St Lucia, St Vincent & the Grenadines, Suriname, Trinidad & Tobago

If so, please indicate for what industries/countries:

Your greatest levels of exports

14. Which industries are responsible for the greatest levels of exports from your country?

15. What are the critical factors behind their success?

16. Which companies are responsible for the greatest levels of exports from your country?

17. What are the critical factors behind their success?

18. In light of the EPA, or changing global trends, what industry(ies) in your country do you think may have the greatest new export opportunities? Either through:

- Regular exports of goods and services (list industries + please explain)

- E-commerce (list industries + please explain)

- Setting up abroad to take advantage of resources there (list industries + please explain)

Trade missions

19. If you organize trade missions abroad, please indicate :
how frequently / for which markets / for which industries (over the last 5 years)

Barriers to Trade

20. What barriers to trade are there in your industry or the industries in which your members participate, and for which of the following markets?

French Guiana

Guadeloupe

Martinica

CARICOM countries

Non-CARICOM Caribbean

Mainland EU

North America

South America

Asia

21. How important do the enterprises you represent or your enterprise consider accessing EU markets?

1 2 3 4 5

not important ☐ ☐ ☐ ☐ ☐ highly important

22. Have they/you ever considered accessing EU markets through the FCORs? (SI/NO)

23. What challenges/difficulties do you perceive in having CARIFORUM products access EU markets through the FCORs?

C - Regulatory, qualifications, standards and quality-related issues

24. Are there any regulations/policies that you would like to see CHANGED or REMOVED that would facilitate greater trade with FCORs/CARICOM? (Yes/NO)

If YES, please indicate which

25. Are there any regulations/policies that you would like to see IMPLEMENTED that would facilitate greater trade with FCORs/CARICOM? (Yes/NO)

If YES, please indicate which

26. Do the enterprises that you represent or your entity have specific well-known brands, labels or quality certification of their own? (Yes/NO)

Please name a few of these brands, labels or quality certification whenever possible

27. How important do you think it would be for them/you to develop brands, labels and quality certification for their/your products?

1 2 3 4 5

not important ☐ ☐ ☐ ☐ ☐ highly important

Please explain why

28. Please list any quality/standard related issues you think are important to identify

Thank you for dedicating time to this questionnaire, your answers are most valuable!

APPENDIX I (B): CARIFORUM Participants in Focus Groups and Interviewees

ANTIGUA & BARBUDA

Name	Title/Organisation	Contact Details
Elma Pigott Humphreys	Managing Director - Antigua Vacations Ltd. (AVL)	antvacation@candw.ag (268)460-7384/6919
Sharon James	Ministry of Finance and Economy (Industry and Commerce)	(268) 462-1542/1626
Sharon Herbert	Economic Planning and Policy Unit – Ministry of Finance and Economy	(268) 462-1542/1626
John Edwards	Antigua and Barbuda Customs Department	customs@antigua.gov.ag (268) 462-0026/0028
Lt. Colonel Ivor Walker	Chief Immigration Officer – Antigua & Barbuda Immigration Department	ivor.walker@antigua.gov.ag (268) 562-1010/1387
Paula Frederick	Office of the Prime Minister	pmo@antigua.gov.ag (268) 562-3913
Dianne Lalla- Rodrigues	Bureau of Standards (Chairman of CROSQ)	dianne.rodrigues@antigua.gov.ag (268) 562-4011
Jacqueline Yearwood	Head, Enterprise Development Department - Antigua and Barbuda Investment Authority (ABIA)	edd@investantiguabarbuda.ag (268) 481-1000-3
Gregory Bailey	Ministry of Agriculture (Crop)	(268) 462-1007/1213
Michelle Henry	Research Officer – Ministry of Finance and Economy (Industry and Commerce)	mhenry@antigua.gov.ag (268) 462-1542/1626
Florence Suttie	Honorary French Consulate (FCORs)	
Calbert Francis	Antigua Distillery Limited	(268) 480-3200

Name	Title/Organisation	Contact Details
Paul Bell	Antigua and Barbuda Travel Industry (ABTI) – (Representative)	
Patrick Ryan	(Antigua and Barbuda Tour Operators Association(ABTOA)	prbryson@candw.ag (268) 480-1296
Sharon Peters	P.S. - Ministry of Tourism, Civil Aviation and Culture	sunshine@antigua.gov.ag (268) 462-0480
Adele Brewster	Antigua Vacations Ltd. (AVL)	antvacation@candw.ag (268) 463-8959
Calvin Ambrose	Executive Director - Antigua & Barbuda Hospitality Training Institute (AHTA)	calvin.ambrose@ab.gov.ag ambe_kalvyn@yahoo.com (268) 562-4578
Yves Ephraim	ICT Representative	
Colin James	Media Congress (Media Representative)	
Wesley James	Managing Director – Archiworks (Architect Representative)	jameswes@hotmail.com (268) 464-7952
Erwin Southwell	Senior Manager, Price Waterhouse Coopers (Accountant Representative)	erwin.southwell@ag.pwc.com (268) 462-3000
Corthwright Marshall	Director of Tourism Policy & Planning - Ministry of Tourism, Civil Aviation and Culture	marshallcu@gmail.com (268) 462-2507
Lesroy Browne	Director of Schedule and Special Projects - LIAT	brownel@liatairline.com (268) 480-5630
Rosemarie McMaster	Managing Director - Susie's Hot Sauce	info@susieshotsauce.com (268) 461-0365/4052
Elrie Farrell	Elrie Farrell & Associates Architects	elrie@EFAarchitects.com (268) 764-6313

BARBADOS

Name	Title/Organisation	Contact Details
Anton Belgrave	Chief Research Economist – Central Bank of Barbados	adbelgrave@centralbank.org.bb (246) 436-6870
Steve Andrews	Chairman – Caribbean Spa and Wellness Association	soothingtouch@sunbeach.net (246) – 262-1191
Delano Scantlebury	Snr. Economist – Ministry of Trade, Industry and Commerce	Delano.scantlebury@commerce.gov.bb (246) 427-5270
Joan Ward- Stewart	Managing Director – Shabeau Media GroupDr	joanward@shabeaumagazine.com (246) 420-4962
Katrina White	Snr. Economist, The Agricultural Planning Unit – Ministry of Agriculture	kwhite@barbados.gov.bb (246) 434-5035
Elsa Fenet	First Secretary – EU Delegation	elsa.fenet@ec.europa.eu (246) 434-8501
Modou Diagne	Snr Business Development Officer – Invest Barbados	mdiagne@investbarbados.org (246) 626-2000
Natasha Ward	Trade Consultant – Barbados Private Sector Trade Team	Natasha.ward@tradeteam.bb (246) 430 - 6541
Joel Richards	Trade and Research Officer – Barbados Manufacturers’ Association	traderesearch@bma.bb (246) 426-4474
Steven McAndrew	Specialist – Free Movement of Skills/Labour – CSME Unit – CARICOM Secretariat	stevenm@csme.com.bb (246) 429-6064
Stacey Hutchinson	Business Development Manager – Caribbean and Latin America – Barbados Tourism Authority	staceyh@visitbarbados.org (246) 427-2623

Name	Title/Organisation	Contact Details
Linda Christian-Clarke	Senior Business Development Manager – Caribbean and Latin America – Barbados Tourism Authority	lindac@visitbarbados.org (246) 427-2623
Humphrey Broome	Business Development Officer – Barbados Investment and Development Corporation	hbroome@bidc.org (246) 427-5350
Sue-Ann Bishop	Senior Research Officer – Ministry of Tourism	bishops@tourism.gov.bb (246) 430-7500/41
Dr. Kevin Greenidge	Director Research Department, Central Bank of Barbados	kcgreenidge@centralbank.org.bb (246) 436-6870
Stéphany Croizet	Martinique Export and Promotion Officer, Chargée de Mission Martinique dans la Caraïbe, Barbados	Stephany.croizet@gmail.com (246) 620-4750
Linda Littleton	Portland, OR	vespaliciousyogi@gmail.com (246) 257-3547
Robert Glass	Executive Project Manager, EPA Implementation Project, GTZ	Robert.glass@gtz.de (246) 436-0578

DOMINICA

Organization	Contact person	Address	Tel	E-mail
BENJO'S SEAMOSS & AGRO-PROCESSING	ROISIN John	P O Box 2065. Roseau	(767) 448-1650	benjoseamoss@cwdom.dm
CARIB SAND & STONE	BONNAIRE Jean-Yves, Managing Director	Carib Sand & Stone Ltd Solomon Pointe-Michel quarry P.O. Box 932, Roseau - Com of Dominica	Tel: (767) 440 02 36	jybonnaire.css@cwdom.dm
CHEZ OPHELIA	MC CARTHY Marie	P.O. Box 152 Copt Hall - Roseau Dominica	(767) 448-3438	chezophelia@cwdom.dm
Customs Division	COMMODORE Bernadette		(767) 266 3718	customs@cwdom.dm

Organization	Contact person	Address	Tel	E-mail
DCA BREWELRY & BEVERAGES Ltd		Snug Corner, Loubiere P.O. Box 278, Roseau	(767) 448-2607	marketing@kubuli.dm
Dca Coalition of Service Industries / Institute of Chartered Accountants of the Eastern Caribbean - Dominica Brand	RICHARDS Orlando Allan		(767) 448 2511	oarichards.kpbdm@cwdom.dm
DCA HUCKSTERS ASSOCIATION	JOSEPH Cecil	Fond Cole #2 C/O P O Box 330 Roseau	(767) 448 3258	hucksters@cwdom.dm
DIGICEL (ORANGE)	BOISDEFER Guy			guy.boisdefer@orange.gp
DISCOVER DOMINICA				
Discover Dominica Authority	PIPER Colin	Financial Center 1st floor, Kennedy Av. P.O. Box 293, Roseau	(767) 448 2045	cpiper@dominica.dm
DIVE DOMINICA	PERRYMAN Derek	Castle Comfort Lodge - P.O. Box 63, Roseau, Dominica	(767) 448-2188	dive@cwdom.dm
Dominica Export Import Agency (DEXIA)	LLOYD Pascal	P.O. Box 173, Bayfront, Roseau	(767) 448-2780	dexia@cwdom.dm
DOMINICA TOULON DISTRIBUTION	TOULON Clifton		(767) 316 0500	toulon@hotmail.com
GERALD SMITH Co.	SMITH Gerald		(767) 448 4243	nyce2001@hotmail.com
HARRIS PAINTS DOMINICA	SORHAINDO Roslyn	P.O. Box 199 - Canefield Industrial Estate - Canefield, Dominica	(767) 448-3011	roslyn.sorhaindo@harrispaintsonline.com
INVEST DOMINICA Authority	SAVARIN Michael	1st Floor Financial Centre, Roseau	(767) 448 2045	msavarin@investdominica.dm
Ministry of Trade	GUISTE Ronnie	Government Headquarters, Roseau, Dominica	(767) 266 3265	foreigntrade@cwdom.dm
Ministry of Trade	WALTERS Nathan	Government Headquarters, Roseau, Dominica	(767) 266 3395	mrpositive@hotmail.com

Organization	Contact person	Address	Tel	E-mail
Ministry of Trade	MAGLOIRE Brenda	Government Headquarters, Roseau, Dominica	(767) 266 3510	tradeofficer@cwdom.dm
Ministry of Trade	DOUGLAS Eisenhower, Dir. Of Trade	Government Headquarters, Roseau, Dominica	(767) 266 3266	foreigntrade@cwdom.dm
PW BELLOT & Co. Ltd	FAGAN Michael		(767) 448 2860	

DOMINICAN REPUBLIC

Organization	Contact person	Address	Tel	E-mail
Asociación Dominicana de Profesionales de la Industria del Cine, Inc. (Adocine)	Peyi GUZMÁN	Tienda Kcettes, Plaza Lincoln 2do. Piso, Sto. Dgo.	809-299-3343	
Asociacion Industrias Rep. Dom.	Roberto Mallén (Director ejecutivo)	Av. Sarasota #20, Torre Empresarial	829-301-0792	rmallen@aird.org.do
Bolsa Turística del Caribe	Luis Felipe AQUINO (President)	Av. 27 de Febrero, Esq. Winston Churchill, Edif. Plaza Central, 2do. Nivel, Local A-204 B	809-412-2979 / 80	809-412-2082
Caribbean Export	Tonika Sealy, Senior Services Advisor	Calle Carlos Lora No. 9, Ensanche Los Restauradores, Santo Domingo	Tel: +1 (809) 531-2411	Fax: +1 (809) 473-7532
Center of Export and Investment of the Dominican Republic (CEI-RD)	Rosa Amelia ABREU, Sub-Directora Técnica	Av. 27 de Febrero, esq. Gregorio Luperón, Sto. Dgo.	809-530-5505 ext. 504	rosa.abreu@cei-rd.gov.do
Central Bank	K. González, Subdirector Departamento Internacional		(809) 221 9111 ext 3190	k.gonzalez@bancentral.gov.do

Organization	Contact person	Address	Tel	E-mail
Centre for the Development of Enterprise	Marie Louise Norton-Murray, Regional Expert and Project Officer CDE Caribbean Regional Office	Av. 27 de Febrero, esq. Gregorio Luperón, Edif. CEI-RD Sto. Dgo.	(809)473-9169	mln@cde.int
Consejo Nacional de la Empresa Privada (CONEP)	Francisco José Castillo, Vicepresidente ejecutivo	Av. Sarasota #20, Piso 12, Torre Empresarial	1(809) 472 7531	fjcastillo@conep.org.do
Consultant	Henri HEBRARD, President	Plaza Francesa local225, Avda Lincoln esq. Paseo de los locutores, Ens. Piantini, Sto Domingo	(809) 565 4143	h.hebrard@henrihebrard.com
Consultant, Comisión Nacional de Negociaciones Comerciales (CNNC)	José Rivas Tavaréz		(809) 533 3564 / 535 9610	j.rivas@dga.gov.do
D.L. DOMAR SA	Luc St Cyr, Vice-President		1809 3092010	
Delegación de la Comisión de la Unión Europea en la República Dominicana	Jean-Marc RUIZ, Jefe del Sector Político, Económico y Comercial	Av. Abraham Lincoln 1063, Sto. Dgo.	809-227-0525	jean-marc.ruiz@ec.europa.eu
Delegación de la Comisión de la Unión Europea en la República Dominicana	Humerto Cristián PEREZ, Sector Político, Económico y Comercial	Av. Abraham Lincoln 1063, Sto. Dgo.	809-227-0525 ext 248	humberto.perez@ec.europa.eu
Dirección de Comercio Exterior y Administración de Tratados Comerciales (DICOEX)	Yahaira SOSA (Director) / Manuel RODRIGUEZ	Avda. 27 de Febrero #209, Distrito Nacional, Santo Domingo	(809) 567 7192	yahaira.sosa@comex.gov.do / manuel.rodriquez@comex.gov.do
Dirección General de Aduanas - Customs	Eduardo RODRIGUEZ (subdirector) / J.A. DIAZ (Estudios Económicos)	Avda. Abraham Lincoln no.1101, Santo Domingo	(809) 547 7070 / 804 4203	e.rodriguez@dga.gov.do / ja.diaz@dga.gov.do

Organization	Contact person	Address	Tel	E-mail
Dirección General de Cooperación Multilateral (DIGECOOM)	Lic. Lidia ENCARNACIÓN, Directora de Cooperación Regional	Av. México, Esq. Dr. Delgado, Oficinas Gubernamentales Bloque A	809-221-8618	lidia.encarnacion@digecoom.gob.do
DR Embassy in Haiti	Ruben SILIE VALDEZ, former ACS Secretary	c/ Las Carreras no.156, sector Gazcue, Sto Domingo / DR Embassy in Haiti, Petionville, Haiti		
Federación Dominicana de Cámaras de Comercio	Dennis SUAREZ, Coordinador	Av Las Carreras 7, Edif. Empresarial, 2do nivel Santiago	(809) 582 2856	coordinador@fedocamaras.com.do
Franco-Dominican Chamber of Commerce	Dimitri FOUNDOUKIDIS, Directeur Commercial	Av. Abraham Lincoln # 456 (Plaza Lincoln local j-44) La Julia A.P. 1442, Sto Domingo	(809) 472 0500/0407	ccdf@codetel.net.do
French Embassy	Patrick LEBRUN, Chef du Service Economique	C/ Las Damas 42, Santo Domingo	(809) 695 4300	patrick.lebrun@dgtpe.fr
General Air Services	Yafreisi CALDERÓN	Ave. Winston Churchill esq. Max Henríquez Ureña, Edif. In Tempo	809-621-7777 ext. 4109	lbaez@generalairservices.com
ISPRI (DICOEX)	Arsenio JIMENEZ, Coordinador Programa	Avda. 27 de Febrero #209, Distrito Nacional, Santo Domingo	(809) 381 8074	arsenio-jimenez@comex.gov.do
PLATERGAS	José Manuel ARIAS FERNANDEZ, Vicepresidente ejecutivo	Avda. J.F. Kennedy, Edif. Compostela 1,1, Urb. Paraiso, Sto Domingo	(809) 368 3232	jmarias@platergas.com
Proyecto de Diversificación Económica Rural	Karina DE POOL	Av. Rómulo Betancourt #15166, Plaza Thalys 3er Piso, Sto. Dgo.	809-338-0887	kdepool@yahoo.com

Organization	Contact person	Address	Tel	E-mail
Revista Cuenca del Caribe	Marcos DE CÓRDOVA, Presidente	Plaza Colonial, Suite M275, C/Luisa Pellerano esq. Julio Verne, Gazcue	809-333-8429 / 809- 687-9111 ext. 275	revistacuencadelcaribe@yahoo.com
Santiago Chamber of Commerce	Carlos Peralta - Encargado de Economía / Ivan Reynoso, Director	Avenida Las Carreras 7, Edificio Empresarial, Apartado Postal 44, Santiago	(809) 582 2856	Email: economia@camarasantiago.com; director@camarasantiago.com
Secretaría de Estado de Relaciones Exteriores, Dpto de Asuntos Económicos	Rafael NUÑEZ (Segundo Secretario)	Avenida Independencia N° 752, Sto Domingo	Tel: (1-809) 535- 6280 ext. 2308	rnunez@serex.gov.do
Secretary of States for Agriculture (Oficina de Tratados Comerciales Agrícolas)	Ruth Montes de Oca S. / J. Ruiz /O. Ariza	OTCA-Secretaría de Estado de Agricultura - SEA- C/ 13 esq. C/ Espiral. Urbanización Fernández. Santo Domingo, D.N., República Dominicana. Código Postal 1012	(809) 227 6188	jruizg@otcasea.gob.do , rmontesdeoca@otcasea.gov.do
Sto Domingo Chamber of Commerce	Milagros PUELLO, exec. vice-pdt	Avda Sarasota no.20, Torre Empresarial AIRD, 2nd floor, Sto Domingo	(809) 682 2688 / (809) 472 2177	ccpsd@camarasantodomingo.org.do
Universidad APEC	Luis Felipe AQUINO	Av. Máximo Gómez #72, Santo Domingo	809-686-0021 Ext. 2274	

JAMAICA

Name	Title/Organisation	Contact Details
Omar Chedda	Private Sector Organisation of Jamaica	omarc@psoj.org (876) 927-6238
Karis Flowers	Private Sector Organisation of Jamaica	karisf@psoj.org (876) 927-6238

Name	Title/Organisation	Contact Details
Mark Thomas	JAMPRO	mthomas@jti.org.jm (876) 978-7755/3337
Earl Jarrett	Managing Director - Jamaica National Building Society	ejarrett@jnbs.com (876) 926-8087/929-7102
Marcia Thomas	Snr Director, Foreign Trade – Ministry of Foreign Affairs and Foreign Trade	ftmfaja@cwjamaica.com (876) 926-4220
Robert Gilbert	IT Consultant	
Ms Smith	Jamaica Tourist Board	(876) 929-9200 - 19
Joseph Livingstone	Managing Director & Chief Software Architect – Enterprise Technology International	Joseph.livingstone@enterprisetechology.com
Christopher Lue	President, Jamaica Institute of Architects	jia@cwjamaica.com apec2@cwjamaica.com 926-3150/2
Glen Gill	Managing Director, Info Group Limited. Representing the ICT Sector – NES	(876) 908-0464
David Douglas	Architect	
Joe Hall	Trade Development Projects – JAMPRO	jhall@jti.org.jm (876) 978-755/3337
Kareen Singh	Corporate Secretary – JAMPRO	ksingh@jti.org.jm (876) 978-7755/3337
Marjorie Straw	Manager, Special Projects, Planning & Corporate Development Division - JAMPRO	mstraw@jti.org.jm (876) 978-7755/3337
Larry Neufville	Mining Engineering	
Andrea Livingstone Prince	Senior Management Consultant – Business Works Limited	thebusinessadvisors@gmail.com

Name	Title/Organisation	Contact Details
		(876) 496-0550/819-2225
Don Gittens	Senior Consulting Officer, Knowledge Services - JAMPRO	dgittens@jti.org.jm (876) 978-7755/3337
Beverly Rose-Forbes	Director of Industry – Ministry of Industry, Investment & Commerce	bforbes@miic.gov.jm (876) 968-7116
Tony Ann Lami	CANCO Ltd - Linstead Market Products	(876) 968-1870
Michelle Welch	Sales Representative - Diamond Paints Manufacturing Limited	michellewelch@diamondpaintsjm.com (876) 937-4951/2
Mr. Dellevalle Banbury	Managing Director - Diamond Paints Manufacturing Limited	dellevallebanbury@diamondpaintsjm.com (876) 937-4951/2
Elaine Dreyer	Fashionwhirl Boutique	876-968-7389
Douglas Cupidon	Senior Corporate Officer, First Caribbean International Bank	douglas.cupidon@firstcaribbeanbank.com (876)935-4747
Karis –Ann Rhoden	Brand Officer - Jamaica Broilers	karhoden@jabgl.com (876) 708-5670-5
Jean Smith	Executive Director - Jamaica Exporters Association	jea@cwjamaica.com jeans@exportja.org (876) 920-6702
Calvin Manduna	Trade Policy Analyst - Ministry of Foreign Affairs and Foreign Trade	Calvin.Manduna@mfaft.gov.jm (876) 501-0913
Knolly Moses	CEO - Pan Media	kmoses@panmedia.com.jm (876) 946-0859
Christine Johnston	Marketing Manager – Jamaica Freight & Shipping Company Ltd	Christine.johnston@jasipco.com (876)764-7047
Jethro Greene	Chief Co-ordinator – Caribbean Farmers Network	cafancaribbean@gmail.com (784) 453-1004

Name	Title/Organisation	Contact Details
Lawrence Madden	CEO – Jamaica Agricultural Society	adminjas114@gmail.com 922-0610-2
Thomas Mayne	Regional Manager, Region 1 - Jamaica Agricultural Society	922-0610-2
Cavelle Francis	OXFAM Jamaica	
Camille Beckford	Jamaica Agricultural Society	922-0610-2
Christopher Emanuel	Chief Financial Officer - Jamaica Agricultural Society	922-0610-2

ST. LUCIA

Name	Title/Organisation	Contact Details
Karen Fowell	Business Advisor - St. Lucia Chamber of Commerce	kfowell@stluciachamber.org (758) 452-5499
Darby Etienne	Empire Entertainments – Copyright League	darby_etienne@yahoo.com
Robert Gajadhr	Skelly Construction	skelly_construction@hotmail.com (758) 453-5832
Vincent Peter	Snr. Programme Officer - Office of Private Sector Relations	peter.opsr@candw.lc (758) 468-2008
Dr. Thomas Samuel	Trade Advisor – Ministry of External Affairs, International Trade and Investment	tsamuel@gosl.gov.lc (758) 468-4560
Mr. O'Donavan Yarde	Chief Executive Officer/Director – Business Support Network Inc.	odyarde@candw.lc (758) 458-0325
Mrs Barbara Innocent-Charles	Business Development Officer – Small Enterprise Development Unit - Ministry of Commerce, Industry and Consumer Affairs	binnocent@gosl.gov.lc (758) 468 4247
Fercinta Louisy	Ministry of Commerce, Industry and Consumer Affairs	flouisy@gosl.gov.lc (758) 468-4212

Name	Title/Organisation	Contact Details
Edward Harris	Real Estate; Business and PR Consultant	eaharrisdestiny@gmail.com (758) 452-8790
Yvonne Agard	Executive Director – St. Lucia Coalition of Services	yvonne.agard@slcsi.org (758) 4527864
Richard Payne	Creative Industries	
Pat Payne	Human Resources Development Consultant	
Judith Beckles	Debt Collection Agency	empbeka@hotmail.com
Armelle Chantelier	Director - Development Consultants Network Inc.	armelle@chatelier.com (758) 458-0090
Agnes Francis	Managing Director - Accela Marketing President – Association of Management Consultants	afrancis@accelamarketing.com (758) 452-6299
Keith Miller	P.R.O. - Association of Management Consultants	
Bernard Fanis	Director – All Biz Limited	bernardfanis2@yahoo.com (758) 453-1730
Ian Sanchez	Saint Lucia Association of Musicians and Performers (STAMP)	stamp.org@gmail.com (758) 234-8210
Keats Compton	Consul General de Ste. Lucie	kcompton@acpnumerique.com keats.compton@orange.fr (758) 452-2300
Joseph Alexander	Executive Director – St. Lucia Employers’ Federation	siefslu@candw.lc
Philip McClaren	Director, Consumer Affairs – Ministry of Commerce, Industry and Consumer Affairs	pmcclauren@gosl.gov.lc (758) 468-4224
Delores Francis	Programme Officer, Trade Policy Unit – Organisation of Eastern Caribbean States	dfrancis@oeecs.org

Name	Title/Organisation	Contact Details
		(758) 455-6327
Renee DeMyers	AMK Inc./Sunsmart Beverages	rdemyers@sunsmartbeverages.com (758) 455-5785

SURINAME

Name	Title/Organisation	Contact Details
Rene van Essen	Director of Suriname Trade and Industry Association	vsbstia@sr.net (597) 475-286
Murwin Pawirodinomo	Information and Communication Officer - Bureau of Standards	m.pawirodinomo@ssb.sr (597) 499-928
Drs David Chin	Excel Waspoeder	david@ckjproduktie.com (597) 456-151
E.E. Refos	E.E. Refos & Associates Inc.	srefo@sr.net (597) 454-122
Ch.Eiflaar	Odany Jewa	odany@sr.net (597) 403-844
Wouter van Meegdenburg	Managing Director – N.V. Consolidated Industries Corporation	wouter.vanmeeqdenburg@cicsur.com (597) 481-966
George Lazo	General Manager - Arinze Tours N.V. / Association of Local Manufacturers (ABI)	info@arinzetours.com georgelazo100@hotmail.com (597) 425-960
Mr. J.L. Belfor	Onderdirekteur Jurdische – en Internationale Zaken Deputy Secretary Legal – International Affairs	jbelfor@atm.sr.org (597) 471-940
Anne Mathieu	International Development Advisor, Paramaribo Representation Office – French Guyana Chamber of Commerce and Industry	a.mathieu@guyane.cci.fr (597) 475-222
Karen Wong Fong Sang	Managing Director – Margarine, Fats and Oils Company Ltd	kwongfongsang@vshunited.com

Name	Title/Organisation	Contact Details
		(597) 482-600
Ing. Wayne Martoredjo	Assistant Managing Director – United Suriname Steel Company	wmartoredjo@vshunited.com (597) 477-618
Nuria Pasaribu-Phang	Sales & Marketing Manager (EXPORT) - N.V. Consolidated Industries Corporation	nuria.pang@cicsur.com (597) 482-050
Thilde Elstak	Planning Office of Suriname	telstak@yahoo.com 473146/475001
Gina Griffith	Legal Advisor – National Institute for the Environment and Development in Suriname	ggriffith@nimos.org (597) 520-043
A. Metin Yenyol	Finance Manager of South America Operation	metin.yenyol@pashainternational.com (597) 520-997
Daniella Sumter	Senior Official – Department of General Economic Affairs	dsumter@yahoo.com (597) 402-080
Michael Watson	Directorate Sports Affairs of Min of Education	mikewatson@sr.net (597) 497654/8508393
Jean Djasman	Ministry of Trade and Industry	jean_djsmn@yahoo.com (597) 402-080
Rosan Sven	Ministry of Agriculture	rosanna.sven@yahoo.com (597) 08521487
E. Aviankoi	Maritime Autoriteit Suriname (MAS)	eaviankoi@mas.sr (597) 476733 tst 260
T. File.	Company Licensing Division – Ministry of Trade and Industry	mfile57@yahoo.com
B. Muller	Import, Export and Exchange Control Division – Ministry of Trade and Industry	(597) 402-080
Marijke Bhaggoe	Trade department – Ministry of Trade and Industry	Merax73@yahoo.com (597) 402-080
S. Forster	Trade department – Ministry of Trade and Industry	(597) 402-080
J. Dogojo	Trade department – Ministry of Trade and Industry	(597) 402-080
Romana Mohan	Trade department – Ministry of Trade and Industry	romana_mohan@yahoo.com

Name	Title/Organisation	Contact Details
		(597) 402-080
R. Codrington	Industry Department – Ministry of Trade and Industry	r_codrington@yahoo.com (597) 402-080
Agnes Salem	Trade department – Ministry of Trade and Industry	agsal6@gmail.com (597) 402-080
S. Nahar	Trade department – Ministry of Trade and Industry	(597) 402-080
Ginna Leysner Vega	Trade department – Ministry of Trade and Industry	(597) 402-080
Henna Djosetiko	Director, Ministry of Trade and Industry	henna.djosetiko@minhi.gov.sr (597) 402-080
K. Codrington	Trade department – Ministry of Trade and Industry	(597) 402-080
S. Rewat	Trade department – Ministry of Trade and Industry	(597) 402-080
P. Soebhai	Trade department – Ministry of Trade and Industry	(597) 402-080
A. Talea	Central Statistical Office	anrotalea@gmail.com (597) 474861/425004
A.F. Alleyne	Consumers' Circle	a.alleyne@comsumentenkring.com (597) 08851462
Hardjopawiro G.	Market Control Department of Ministry of Industry	g.hardjopawiro@live.com
A. Wiebers	Economic Control Department – Ministry of Trade and Industry	(597) 8237233
C. Cameron	Department of Economic Control - Ministry of Trade and Industry	(597) 483949/08903396
Spier	Quick Response Team – Ministry of Trade and Industry	livi-nita@yahoo.com (597) 402-722
F. Maria	United Suriname Steel Company	f.maria@vshunited.com (597) 482600
J. Alphons	Immigration Services Division of Ministry of Defense	(597) 08828071
Andy Truideman	Customs Office	andytruideman@yahoo.com (597) 402-913
Gunputsing R.	Indeco	rgunputsing@indec0.sr (597) 497-871/430-366

TRINIDAD & TOBAGO

Name	Title/Organisation	Contact Details
Gary Turton	Director, Architects and Urban Planners & Representative of the Trinidad and Tobago Institute of Architects	gary@aclaworks.com (868) 625-2784
Mayvis Gibus	Martinique Export and Promotion Officer – Chargee de Mission Martinique dans la Caraïbe	mayvis.gibus@region-martinique.mg (868) 685-9847
Steve Nannette	Charge de Prospection Economique pour la Region Guadeloupe - Regional Council of Guadeloupe	prospectiontt@yahoo.fr (868) 622-7446
Tricia Balthazar	Services Development Manager - Caribbean Association of National Telecommunications (CANTO)	tbalthazar@canto.org (868) 622-3770/4781
A Representative	Trinidad and Tobago Association of Midwives	ttam95@hotmail.com (868) 679-8008
Randy Depoo	The Law Association of Trinidad and Tobago	rdepoo@depoolaw.com (868) 622-9377
Albert Chow	President - Business Development Company Limited	achow@bdc.co.tt (868) 623-5507
Jacqueline Charles	Ministry of Trade and Industry	jcharles@tradeind.gov.tt (868) 623-2931-4
Neville Alexander	Economist – Ministry of Trade & Industry	nalexander@tradeind.gov.tt (868) 627-2931-4
Trudy Lewis	Senior Trade Specialist – Ministry of Trade and Industry	tlewis@tradeind.gov.tt (868) 624-9594
Kriyaa Balram Singh	Economist – Ministry of Trade and Industry	kbalramsingh@tradeind.gov.tt (868) 623-2931-4
Mario Romany	Trade Policy Officer – The Caribbean Association of Industry and Commerce	mariromany1@tstt.net.tt (868) 628-9859

Name	Title/Organisation	Contact Details
Ann-Marie Agong	Trade Policy Officer – The Caribbean Association of Industry and Commerce	tradepolicyofficer@tstt.net.tt (868) 628-9859
Winston Jailal	Industrial Manager – Century Eslon Limited	winston.jailal@centurieslon.com (868) 645- 5555-9
Florence Louis-Edouard	Trade Facilitation Officer – Trinidad and Tobago Coalition of Services Industries	flouis@ttcsi.org (868) 471-2189
Rabindra Jaggernauth	Managing Director – Esprit Consultants Limited	rabindra.jaggernauth@esprit.cot.tt (868) 627-8544
Mark Lankester	Group General Manager – Century Eslon Limited	Mark.lankester@centurieslon.com (868) 645-5555-9
Linda Louison	Managing Director – CDA Architecture Limited	linda@cdaarchitecture.com (868) 628-3516
Michele Paige	Operations Manager – Cascadia Hotel	mpaige@cascadiahotel.com (868) 623-4208/9
Winston Borrell	Managing Director – Carnetta's Inn	winston@carnettasinn.com (868) 628-2732
Vassell Stewart	Chief Executive Officer – Trinidad and Tobago Agribusiness Association	vasstew@hotmail.com (868) 645-9204
Nirad Tiwarie	Chief Executive Officer – Trinidad and Tobago Coalition of Services Industries	Info@ttcsi.org ntiwarie@ttcsi.org (868) 622-9229
Representative of the French Embassy	French Embassy in Port of Spain	(868) 622-7446

ST. VINCENT & THE GRENADINES

Name	Title/Organisation	Contact Details
Johann Stewart	Civil/Structural Engineer – Stewart Engineering Limited	stewarteng@karibcable.com

Name	Title/Organisation	Contact Details
		(784) 457-2644
Sylvonne Jack	Trade Officer/CSME Focal Point - Ministry of Foreign Affairs, Commerce and Trade	sjack.foreignaffairs@mail.gov.vc 784-450-0300
Ezra Ledger	Executive Director – St Vincent and the Grenadines Bureau of Standards	svgbs@vincysurf.com (784) 457-8092
Curtis Dennie	Business Facilitation/Aftercare Services Office – Invest SVG	cdennie@investsvg.com (784) 457-2159
Christo Primus	Economist – Ministry of Telecommunications, Science, Technology and Industry	chavado_young@yahoo.com (784) 456-1223
Ricardo Drayton	Managing Director – Caribbean Aviation Management Inc.	rdvas@vincysurf.com (784) 456-5600
Felix Lewis	General Manager/Project Co-ordinator – Centre for Enterprise Development Inc.	cedsvg@gmail.com (784) 451-2235/6
Ambassador Ellsworth John	Director, Regional Integration and Diaspora Unit – Office of The Prime Minister	ejohn@ridusvg.com (784) 457-2430
Raymond Ryan	Chief Fisheries Officer – Ministry of Agriculture, Forestry and Fisheries	fishdiv@vincysurf.com (784) 456-2738
Jacinta Elliott	General Manager - Caribbean Aviation Management Inc	jelliott@vincyaviation.com (784) 456-5600
Eugenia Shillingford Stewart	C.E.O. SMAT Partners Limited	esstewart@yahoo.com (784) 456-1912
Desilda McKenize	Managing Director – E & D's Snacks	edsnacks@hotmail.com (784) 456-2163
Clarence Harry	Ministry of Foreign Affairs, Commerce and Trade	charry.foreignaffairs@mail.gov.vc (784) 456-2442
Osmond K. Davy	Chief Executive Officer – East Caribbean Group of Companies	odavy@ecqcsvg.com (784) 457-1918

Name	Title/Organisation	Contact Details
Glenford Stewart	Managing Director – Stewart Engineering Limited	stewarteng@karibcable.com (784) 457-2644
Suzanne Joachim	Managing Director – Joachim & Associates (HR and Business Consulting)	sjoachim@joachimandassociates.com (784) 528-8518
Faez Moussa	Director, M. Moussa & Sons	mmoussa@vincysurf.com (784) 432-1919
Jethro Greene	Chief Co-ordinator – Caribbean Farmers Network	cafancaribbean@gmail.com (784) 453-1004
Shanna Browne	Export Development Officer – INVEST SVG	sbrowne@investsvg.com (784) 457-2159
Tonya Fraser	Marketing Officer - INVEST SVG	tfraser@investsvg.com
Cicyln Joseph		cicyln.joseph@time4lime.com
Wendell Lewis	Marketing Director - Caribbean Business Machine Centre	cbmc@vincysurf.com (784) 451-2717
Taxi Driver	Peech Taxi Service	ampeech@hotmail.com (784) 533-6332
Edmond Thomas	Taxi Service	(784) 458-4179
Alita Garraway	Aurora's (Agro-processing)	aurora_garraway@hotmail.com (784) 529-6487
Erica McIntosh	Manager – Erica's Country Style	ecs@vincysurf.com (784) 456-2951
Safia London	Executive Director – Chamber of Commerce of St. Vincent & the Grenadines	(784) 457-1464
Randolph Pelle	Seagold International Inc.; Superior Woods International	guyana-interiorexterior@yahoo9.com (784) 498-1662

List of Questionnaire Respondents from CARIFORUM Countries

First Name	Surname	Position	Type of Organization	Country	Name of Organization
Sharon	Mayers	Export Sales Manager	BSO	Trinidad & Tobago	Vemco Limited
Roannda	Dalrymple	CABA Secretariat Rep.	BSO	Trinidad & Tobago	Caribbean Agri-business Association (CABA)
Phillippe	Agostini	Executive Chairman	BSO	Trinidad & Tobago	CGH Ltd/ E.A Agostini Estates Ltd.
Winston	Jailal	Sales Manager	BSO	Trinidad & Tobago	Century Eslon Limited
Rodney	Cowan	Marketing Manager	BSO	Trinidad & Tobago	Trinidad Cement Limited
Rodney	Nanan	Export Manager	BSO	Trinidad & Tobago	National Canners Limited
Tricia	Balthazar	Service Development Manager	BSO	Trinidad & Tobago	CANTO
Kinda	Thomas	Market Development Team	BSO	Trinidad & Tobago	Trinidad Cement Limited
Marcia	Rollock	President	GA	Trinidad & Tobago	Trinidad & Tobago Association of Midwives
Mark	Raymond	Chairman	BSO	Trinidad & Tobago	Association of commonwealth association of Architects in the Caribbean
Randy	Depoo	Member of Council	BSO	Trinidad & Tobago	Law Association
Mark	Lankester	General Manager	BSO	Trinidad & Tobago	Century Eslon Ltd.
Lakhan	Bharath	Accountant	BSO	Trinidad & Tobago	Advance Foam Ltd.
Kriyaa	Balramsingh	Economist	GA	Trinidad & Tobago	Ministry of Trade & Industry
Mahindra	Ramdeen	Trade Development Specialist	BSO	Trinidad & Tobago	Trinidad & Tobago Manufacturers Association
Sharon	Peters	Permanent Secretary	GA	Antigua & Barbuda	Ministry of Tourism, Civil Aviation & Culture
Calvin	Ambrose	Executive Director	GA	Antigua & Barbuda	A & B Hospitality Training Institute
Calbert	Francis	Sales & Marketing Executive	Private Sector	Antigua & Barbuda	Antigua Distillery Limited
Alita	Garraway	CEO	Private Sector	St. Vincent & Grenadines	Aurora's
Desilda	McKenzie	Owner/Manager	Private Sector	St. Vincent & Grenadines	E & D Enterprise Limited

First Name	Surname	Position	Type of Organization	Country	Name of Organization
Johann	Stewart	Civil/Structural Engineer	Private Sector	St. Vincent & Grenadines	Stewart's Engineering
Mr.	Ryan	Chief Fisheries Officer	GA	St. Vincent & Grenadines	Fish Market
Eugenia	Shillingford-Stewart	CEO/MD	Private Sector	St. Vincent & Grenadines	Smat Partners Ltd/ Fidelity International Consultants
Felix	Lewis	CEO	GA	St. Vincent & Grenadines	Centre for Enterprise Development
Clifton	Gumbs	Managing Director	Private Sector	St. Vincent & Grenadines	Caribbean Sheet & Tubular Ind Ltd
Ricardo	Drayton	Managing Director	Private Sector	St. Vincent & Grenadines	Caribbean Freight & Courier Ltd
Miguele	Despointes	Manager	Private Sector	St. Vincent & Grenadines	Villamar Ltd
Erica	McIntosh	CEO	Private Sector	St. Vincent & Grenadines	Erica's Country Style
Jethro	Green	Chief Coordinator Regional	Private Sector	St. Vincent & Grenadines	Caribbean Farmers Network
Edward	Harris	Director	BSO	St. Lucia	Realtors Association (St. Lucia) Inc.
Bernard	Fanis	President	Private Sector	St. Lucia	Professionals in Action for Creative Enterprise
O'Donavan	Yaarde	CEO	Private Sector	St. Lucia	
SURINAME					
N.	Phang	Sales & Marketing manager - export	Private Sector	Suriname	Cons. Industries Corp
Karen	Wong Fong Sang	Managing Director	Private Sector	Suriname	Margarine, Fats & Oils Co. Ltd
Roy S.	Gumpatring	Sales & Marketing Manager/ CEO	BSO	Suriname	Indeco Net
Gina	Griffith	Legal Advisor	GA	Suriname	NIMOS
Murwin	Pawirodinomo	Information & Communication Officer	GA, BSO	Suriname	Suriname Standards Bureau
Lilian	Wiebers	President	BSO	Suriname	Woman's Business Group
Stanley	Marica	General Manager/ Attorney at Law	BSO	Suriname	Law Firm Marica
Charles	Eoflaur	Manager	BSO	Suriname	Odany F
Leter	Meredith	Legal Officer	GA	Suriname	Telecommunications Authority

First Name	Surname	Position	Type of Organization	Country	Name of Organization
					Suriname (TAS)
Wayne	Martoredjo	Assistant Managing Director	Private Sector	Suriname	N.V. SMH - Staalrij. - United Suriname Steel Co.
R. Van	Essen	Director	BSO	Suriname	Suriname Trade & Industry Association
Erna	Avianboi	Head of Marketing & Communications	BSO	Suriname	Maritime Authority
Edzii	Edinboro	Group Sales Manager	Private Sector	Barbados	Cot Media Group

APPENDIX I (C): FCOR Participants in Questionnaires, Focus Groups and Interviewees

FRENCH GUIANA

Organization	Contact person	Address	Tel	E-mail
(CCIG) Service d'Appui à l'International	Seidryck PALAMY, Head of Service International Business Support	Place de l'Esplanade - BP 49 - 97321 CAYENNE Cedex	0594 299 678 / 777	s.palamy@guyane.cci.fr g.prosper@guyane.cci.fr mf.eli@guyane.cci.fr
AFD (Agence Française de Développement)	Morgane BAUDOUIN	Lot. Héliconias, Rte de Baduel BP 1122 - 97345 Cayenne Cx	0594 29 90 81	beaudouinm@afd.fr
CBCI (Charpente Bois Couverture Industrialisées)	Eric BERLIOZ	Lot 107, PAE Dégrad des Cannes - 97354 Rémire-Montjoly	0594 35 47 88	eric.berlioz@cbci.fr
CEEI - Centre Européen d'Entreprises et d'Innovation	M. LUBERT	16bis, rue du 14 juillet 97300 Cayenne		
CGPME	Joëlle PREVOT MADERE / Alex MADELEINE	CGPME GUYANE – 744, Route de Baduel - BP 741 - 97337 CAYENNE CEDEX	05 94 25 33 08 05 94 30 15 97	jpm@ool.fr
Chargé de mission CCEF/SGAR	Germain LABONNNE		0594 33 70 33	germain.labonne@cnes.fr
CMA-CGM / SOMARIG	Hervé Rouchon	Z.I. Degrad des Cannes, REMIRE BP 81 - 92322 Cayenne Cx	0594 35 42 00	cay.hrouchon@cma-cgm.com
CNES (Centre National D'Etudes Spatiales)	Pierre ZAMMIT, Directeur délégué	BP 726 - 97387 Kourou Cx	0594 33 56 76	pierre.zammit@cnes.fr

Organization	Contact person	Address	Tel	E-mail
Comité du Tourisme de la Guyane	Eric MADELEINE, directeur Général	12 rue Lallouette BP 801 - 97338 Cayenne Cx	0594 29 65 18	eric.madeleine@tourisme-guyane.com
CONSEIL GENERAL DE LA GUYANE	Richard MONLOIS (Dir. Cabinet / Aff. Internationales)	Place L. Héder - B.P. 5021 - 97305 CAYENNE Cedex	05.94.29.55.00	rmonlois@cg973.fr
CONSEIL REGIONAL DE LA GUYANE, Service Appui aux Entreprise	Isabelle CORTANA (chef service)	4179 Rte de Montabo, Carr. De Suzini BP 7025 - 97307 Cayenne Cx	0594 27 12 14	isabelle.cortana@cr-guyane.fr
Consultant / Conseiller du Commerce Extérieur de France (CCEF)	Philippe BOBRIE (CCEF)		0594 25 44 70	bobrie@nplus.gf
French Embassy in Trinidad & Tobago	Michel TRINQUIER, Ambassador	Tatil Building, 11 Maraval Rd - Port of Spain	1868 622 7446	michel.trinquier@diplomatie.gouv.fr
GUYANE TECHNOPOLE	Geoges EUZET	16 BIS RUE DU 14 JUILLET - 97300 C	0594251781	george.euzet@guyane-technopole.org
MACH DEAL	OSTORERO Carol	Carrefour du Larivot, 92351 Matoury	0594 29 66 00	carol.ostorero@machdeal.com
MEDEF	GERMAIN Luc	27 A Rue Maurice Marchenet-Rés Gustave Stanislas Source de Baduel - BP 820 97338 Cayenne Cx	0594311771	medef.guyane@wanadoo.fr
PMIG - Association des moyennes et petites entreprises de la Guyane	Thomas BOURGUIGNON	Zone Collery 1 - BP 1211 - 97346 Cayenne Cx	0594386328	mpiguyane@wanadoo.fr
UNIFIPECHE	Guytaine BOURGUIGNON	Port du Larivot, BP 1125 - 92345 Cayenne Cx	0594 35 18 36	unifipeche973@wanadoo.fr

GUADELOUPE

Organization	Contact person	Address	Tel	E-mail
ADEME Guadeloupe	Claude COROSINE	Imm. Café Center - Rue Ferdinand Forest - 97122 Baie-Mahault	0590 26 78 05	ademe.guadeloupe@ademe.fr
ARK	Lydia BARFLEUR	Villa Leïla. Section Duportail. 97115 Ste Rose	(+590)590 482 338 / cel: (+590) 690 186 497	ark971@orange.fr
Auberge de la Vieille Tour, Groupe ACCOR	Marc BESSODES, Directeur Général	Montauban - 97190 Gosier	0590 84 79 88	H1345-GM@accor.com
C C E F - Tourism	BESSODÈS Marc	Groupe Accor	06 96 41 54 24	h1345_gm@accor.com
C C E F - Waste Meatment Renewable Energy	CHOURAKI Jacques	Fax : +590 590 911 539	Tél. : +590690576403	jchouraki@ecodez.fr
C C E F / OHADAC	MARTIN BRIERE Eve-Lyne	Avocate Droit des Stés	06 90 35 58 16	cabinetmartinbriere@yahoo.fr
Chamber of Commerce C C I Pointe A Pitre	Vasanta VENCHARD International Div.	Hôtel Consulaire - Rue Félix Eboué - 97159 Poite-à-Pitre Cx	0590 937 714	v.venchard@pointe-a-pitre.cci.fr
Chamber of Commerce C C I Pointe A Pitre	PICHI Naïka, Technical assistance for International Trade	Hôtel Consulaire - Rue Félix Eboué - 97159 Poite-à-Pitre Cx	05 90 93 76 80	n.pichi@pointe-a-pitre.cci.fr
C E I B A / U M E P	MONTANTIN Michele / DORRIFOURT Sabine	Brasserie Lorraine	06 90 47 67 45	michele-montantin@ceiba-gp.com ; sabine.dorrifourt@ceiba-gp.com
CCEF / N T I Guadeloupe	NOGLOTTE Thierry		Idem	ntiguadeloupe@wanadoo.fr
CECIL Consultants	NOGLOTTE Thierry		06 90 18 13 14	c-consultants@wanadoo.fr
CIDR Responsable Gestion	SABIN Michaël			michaelsabin@orange.fr
Comité du Tourisme de Guadeloupe	Th. Gargard	Place de la Victoire, PAP	(+590) 5 90 83 89 22	
CONSEIL REGIONAL GUADELOUPE	JL BOUCARD, Director of	Hotel de Région - Av. Paul Lacavé - Petit-	0590 80 41 17	Jean-Louis.BOUCARD@cr-guadeloupe.fr

Organization	Contact person	Address	Tel	E-mail
	European Affairs and Cooperation	Paris - 97100 BASSE-TERRE		
CONSEIL REGIONAL GUAGELOUPE	Agathe VINCENOT, Head of Service International Cooperation	Hotel de Région - Av. Paul Lacavé - Petit-Paris - 97100 BASSE-TERRE	0590 47 06 02 / 80 40 50	agathe.vincenot@cr-guadeloupe.fr
CONSEIL REGIONAL GUAGELOUPE	SAULCHOIR Bernard		05 90 80 41 12	bernard.saulchoir@cr-guadeloupe.fr
Directeur C I D R	SABIN Jean	Fax : 0590 321 811	06 90 34 26 83	percut.tech@wanadoo.fr
Directeur Régional du Commerce Extérieur Antilles-Guyane	BENOIT Christian, Director / MARCEL-ROCHE Marie-Lise, Assistant Director	Morne Mamiel – Providence, 97139 Abymes	05 90 21 17 75	christian.benoit@dgtpe.fr
Earth Wind & Power	Alain BLAZE	41, rue de Nozières - 97110 Pointe-à-Pitre	0590 933 083	alaingreeneearth@orange.fr
Fédération des Associations des Professionnels de l'Hôtellerie et du Tourisme	Nicolas VION, Président	La Maison Créole - Montauban - 97190 Le Gosier	0590 84 90 90	hotelsdeguadeloupe@lamaisoncreole.com
INSEE (Institut national de la statistique et des études économiques)	Patrick HERNANDEZ	Ch. des Bougainvilliers - Cité Guillard BP 96 - 97102 Basse-Terre Cx	0590 99 36 30	patrick.hernandez@insee.fr
Key Smile Consulting	ARCONTE Joël-André, consultant/coach		06 90 12 47 74	keysmileconsulting@gmail.com
MEDEF - Union des Entreprises de la Guadeloupe	Michel POMAREDE	Immeuble S.C.I.-B.T.B. - Voie Principale - Z.I. Jarry - 97122 Baie-Mahault	Tél.: 05.90.26.83.58	uprg@wanadoo.fr
MEDEF Guadeloupe	Maryse MAYEKO-ROZAN, Délégué Général	Imm. SCI BTB - Voie principale Jarry - 97122 Baie-Mahault	0590 26 83 58	mayroz@wanadoo.fr
MEDEF Guadeloupe	Yvan EUGENIE, Conseiller TPE	Imm. SCI BTB - Voie principale Jarry - 97122 Baie-Mahault	0590 26 83 58	yeugenie.medef@orange.fr

Organization	Contact person	Address	Tel	E-mail
ORANGE	André Dupic		(+590) 590 38 52 04	
Synergile	Nathalie SIMON	Espace Régional, Bvd Gal-de-Gaulle, Le Raizet, 97139 Abymes		
Université des Antilles et de la Guyane, CAGI / OCICAR	Fred RENO	Campus de Fouillole, Faculty of Law and Economics	(+590) 590 48 32 78	fred.reno@univ-ag.fr

MARTINIQUE

Organization	Contact person	Address	Tel	E-mail
ARCM (Cinéma Martinique)	Steve ZEBINA		0696 29 98 89	
3 Kat Show	Bernard LAGIER	Qu. Bonny 97240 Le François	0596 72 62 80	twakat.show972@orange.fr
A M P I	CRESTOR Richard (Sec General)/ PECOME Stéphanie (Eco Studies)		0596 507400	specome@ampi.mq
ADEM (Agence pour le Développement Economique de la Martinique)	Bruno BRIVAL	Imm.Foyal 2000- Place Lafcadio Hearn - Rue du Gouverneur Ponton - 97200 Fort-de-France	0596 73 45 81	b.brival@adem.mq
AFD (Agence Française de Développement)	Eric BORDES	Bvd. Gal de Gaulle BP 804 - 97244 Fort-de- France Cx	0596 59 44 73	bordese@groupe-afd.org
Agro Express	BRELEUR Withney			agro.express@wanadoo.fr
Anonym'Art Architecture / Consul Hon Dominica	FRAMAJON Mark	31 bis Rue Alexandre Trissot	0596 73-1600	anonymart@wanadoo.fr
AQUA ANTILLES	Karl LARCHER	PETITE ANSE, 97217 ANSES D'ARLET		karl.larcher@gmail.com
AVENSO	BRUCH Dominique	10, rue des Moracées- 9233 Schoelcher	0596 613009	avenso@orange.fr

Organization	Contact person	Address	Tel	E-mail
Brasserie Lorraine	DANGANY Fernand	97232 Lamentin	0596 511 955	fdangany@brasseriellorraine.com
C C I M	DUPOT Jessica		0596 552850	j.dupot@martinique.cci.fr
C C I M	FRANCISQUE Myriam		0596 552850	m.francisque@martinique.cci.fr
C C I M	MARIE-CLAIRE Pascale		0596 552900	marie-claire@martinique.cci.fr
C C I M	OZIER-LAFONTAINE Jordana		0596 552825	j.ozier-lafontaine@martinique.cci.fr
C C R	HO-HIO-HEN Jean-Luc			jeanluc@hohiohen.com
Carrières Canonville	Stéphane ABRAMOVICI	Fond Canonville, 97250 Saint Pierre	05 96 52 92 59	stephane.abramovici@gbh.fr
Carrières Gouyer	Pascal LINA, Directeur Commercial	Carrière Perinelle - BP 43 - 97250 Saint- Pierre	0596 55 75 57	lina@groupegouyer.com
CCIM Chambre de Commerce et d'Industrie de la Martinique	Marie-Noëlle CATAYEE - Relations Internationales (+ TASK FORCE)	50 rue Ernest Deprogre BP 478 - 97 241 Fort- de-France Cx	0596 55 28 52	mncatayee@martinique.cci.fr
Centre Hospitalier Universitaire de la Meynard	Bernard CAVIGNAUX, Directeur adjoint	BP 632 - 97231 Fort- de-France	0596 55 23 10	bernard.cavignaux@chu-fortdefrance.fr
CEREGMIA (Research Institute, University Antilles - Guyane)	Fred CELIMENE	BP 7209 - 97275 Schoelcher Cx	0596 72 73 98	fred.celimene@martinique.univ-ag.fr
CERTA	ROSEMAIN Richard		0596 733505	certao.cgme@wanadoo.fr
CGIT (Compagnie Générale d'Informatique et de Technologie)	Denis-Antoins HERAULT, General Manage	BP 443 - 97292 Lamentin Cx 2	0596 42 89 99	denisantoine.herault@wanadoo.fr
CGPME Martinique	Catherine CONCY / F. ROSAMONT	13, résidence Vieux Moulin - Didier 97 200 Fort-de-France	0596 70 05 72	direction@cgpme-martinique.fr
CONSEIL REGIONAL DE LA MARTINIQUE	Maguy MARIE-JEANNE – Chef Service Relat. Internationales et	Conseil Régional de Martinique - Rue Gaston Defferre -	0596 59 64 69 / 59 80 49 / 59 64 40 / 59 80 05	service.cooperation@region.martinique

Organization	Contact person	Address	Tel	E-mail
	Coopération / DROUAULT-EUGENE Sandra	Cluny, 97 200 Fort de France		
Consulate General Saint Lucia	COMPTON Keats			keats.compton@orange.fr
Consulting ICE (Images Communication Edition)	Fred JEAN-BAPTISTE, Directeur Général	Pointe Larose BP 34 - 97231 Le Robert	0596 53 96 73	consultingice@yahoo.fr
Customs (Direction Interrégionale Douanes Antilles-Guyane)	Miguel MANSUELA		0596 60 7798 / 0596 70 7272	miguel.mansuela@douane.finances.gouv.fr
Customs (Direction Interrégionale Douanes Antilles-Guyane)	Gérard HIERSO Danielle PORTEL (service entreprises)	Plateau Roy-Cluny - BP 630 - 97261 FORT DE FRANCE CEDEX	0596 70 72 81	pae-martinique@douane.finances.gouv.fr
CWWA Antilles-Guyane	TERRINE Xavier			cwwa.antilles-guyane@gmail.com
D M S L	MOUTOUSSAMY David		O596 577676	david.moutoussamy@group-&m.com
DCG Consultants	CHARLERY- GUITTEAUD Daniel			dcgconsultants@sain.fr
Direction générale de la concurrence, de la consommation et de la répression des fraudes	Roland AYMERICH	Hôtel des Finances Rte de Cluny, BP 7002 97274 SCHOELCHER CEDEX	05 96 59 55 14	UD972@dgccrf.finances.gouv.fr
DIRECTION INTERREGIONAL DE LA POLICE AUX FRONTIERES	Mme Duchêne	AEROPORT DE FORT-DE-FRANCE/LE LAMENTIN	05.96.51.06.92	paf.martinique@wanadoo.fr
Don Miguel - Music Prod	Miguel ELIZABETH	Bureau Export Culture, Cons. Régional Martinique		becmartinique@gmail.com
DRIRE (Direction Régionale de L'industrie de la Recherche et de l'Environnement)	CHARLERY-ADELE Jean-Max	31, rue du Prof. Raymond Garcin - BP 458 - 97205 Fort-de- France Cx	0596 70 12 21	jean-max.charlery-adele@industrie.gouv.fr
Ecole de Musique Emass	Michel BEROARD			emass972@gmail.com
EGC Martinique	PASTUREAU Marie-		O596 645863	communication@egc.martinique.com

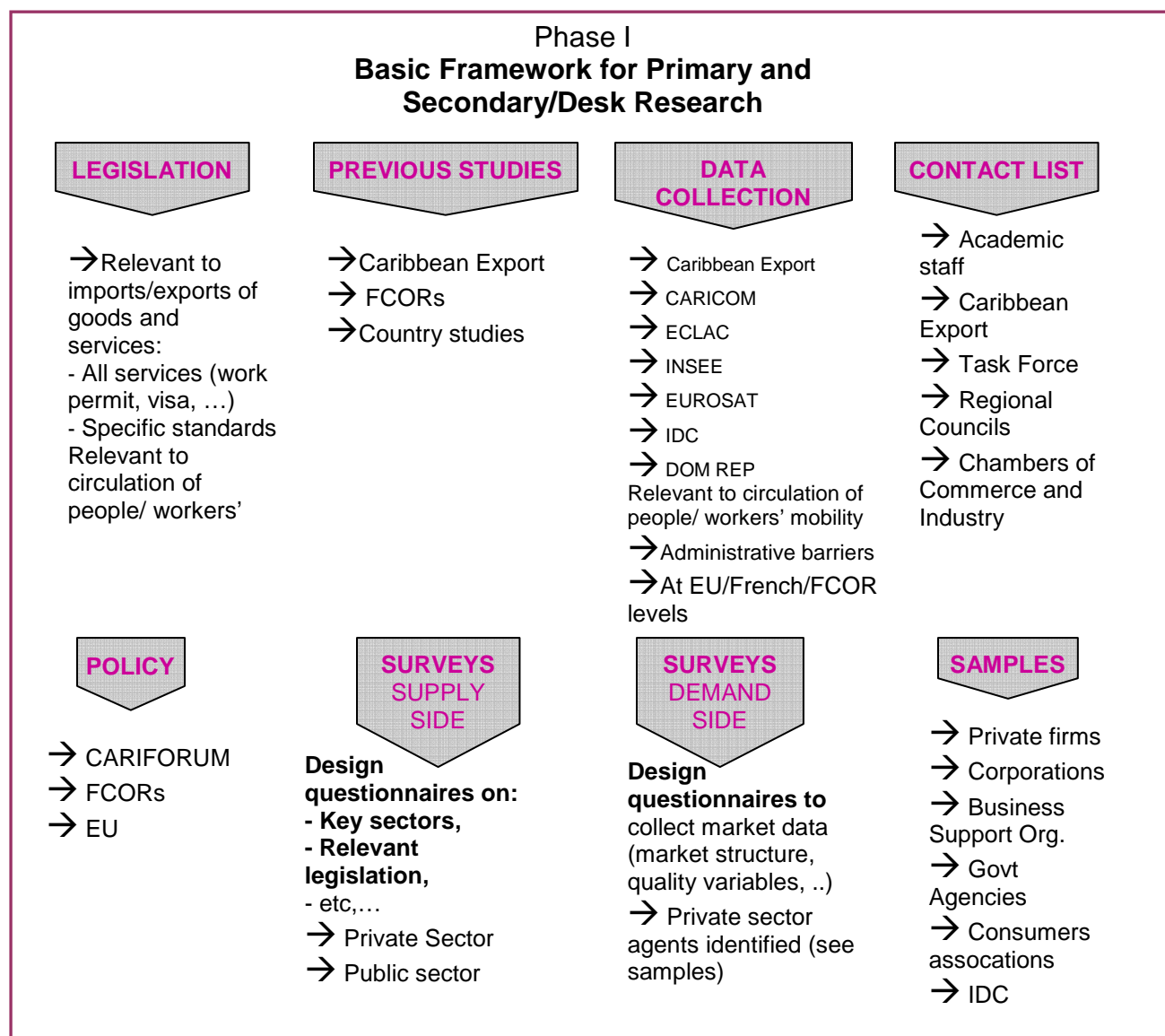
Organization	Contact person	Address	Tel	E-mail
	Claude JEAN-MARIE Gaëlle			
ENTP/SFC	ETILE Nicolas			nicolas.etile@cabioc.com
Europe Caraïbe Consultant	AUGUIAC Maxime	9, Rés. La Sylve, Rue du Gardénia, 97200 FORT-DE-FRANCE	0596 718066	maxauguiac@sasi.fr
Groupe Bernard Hayot (GBH)	ASSIER DE POMPIGNAN Nicolas	Acajou, BP 423, 97292 LAMENTIN CX2	0596 50 86 74	nicolas.depompignan@gbh.fr
Groupe SEEN	SAINTE-CROIX Régine			regine.sainte-croix@groupeeseen.com
IEDOM	S. ATTALI	8 BVD GAL DE GAULLE - 97200 FDF	0596 59 44 00	
Inter Entreprises / CCEF	Francette ROSAMONT	29 Rue Anse Bélune, 97220 Trinité	0596 58 58 46	f.rosamont@interentreprises.com
ITEC-CEEI, TECHNOPOLE MARTINIQUE	Gilles Gestel, ITEC-CEEI et TECHNOPOLE MARTINIQUE		05 96 75 71 68	gilles.gestel@cacem-mq.com
K&C	Kindy, Directeur	Qu. Jeanne d'Arc - 97232 Lamentin	0696 91 62 37	kindy@kindycreation.com
KAP AG	PIERRE-LOUIS Ludovic			ludovic.pierrelouis@gmail.com
LMD Consulting	LESALES Murielle	41, Rte de Rodate, 97234 Fort-de-France	0696 21 85 37	
MOGA	COSQUER Cendrine			Moga.Fwi@gmail.com
Protection des végétaux – Direction de l'Agriculture et de la Forêt de la Martinique	Jean IOTTI, Chef de Service	DAF-SPV, Pointe des Sables, BP 438, 97 257 FORT DE FRANCE CEDEX	0596 71 21 06	
Pilote Partenaire	PRUDENT Ker			pilotep@gmail.com
PN Consulting	P. NOLEO			pnconsulting.noleo@gmail.com
Réseau TRAMIL	Emmanuel NOSSIN	Fort-de-France	0596 59 2939 / 0596 52 94 27	

Organization	Contact person	Address	Tel	E-mail
SATRAP	SAINTE-ROSE Philibert		0596 600061	satrap.psr@orange.fr
Taino PROD	Jean-Marc TAINO	Quartier du Bac. 97224 Ducos	0596 77 56 40	tainoprod@gmail.com
University Antilles Guyane	Emmanuel JOS, Dean Faculty of Law and Economic Sciences	BP 7209 - 97275 Schoelcher Cx	0596 72 74 18	emmanuel.jos@martinique.univ-ag.fr
WINGS	Patrick NOLEO	Qu. La Vierge 97213 Gros Morne	0696 816738	wings972@gmail.com

APPENDIX II: Work Plan / Timetable

Prior to visiting each of the selected countries/territories, the Consultants carried out secondary research/desk research to examine relevant previous studies and data sources as outlined below.

The information contained in these previous studies and/or data were incorporated into this study to the extent that they provided a foundation or perspectives that assisted in addressing the key issues. In Appendix IV are listed some studies and data available for our study.



Timetable of Activities

Activity	Responsibility	Start Date	End Date
Phase 1: Stage Setting/ Inception Meeting (CARIBBEAN EXPORT & Task force)	CARIBBEAN EXPORT, NW, LA	Nov. 10, 2009	Nov. 10, 2009
Inception Report	NW, LA	Oct. 1, 2009	Nov. 10, 2009
Phase 2: Secondary/Desk Research	NW, LA	Oct. 1, 2009	Nov. 27, 2009
Phase 3: Design of Data Collection Instruments	NW, LA, CARIBBEAN EXPORT	Nov. 10, 2009	Nov. 16, 2009
1st interim report	NW, LA	Jan. 10, 2009	Jan 10 2010
Phase 4: Data Collection			
Field Visits			
• Dominican Republic	LA, NW	Jan 11, 2010	Jan 15, 2010
• Trinidad & Tobago	NW, A-Z	Jan 20, 2010	Jan 22, 2010
• Dominica	LA, NW	Feb 3, 2010	Feb 4, 2010
• Guadeloupe	LA, NW	Feb 5, 2010	Feb 8, 2010
• French Guiana	LA, NW,	Feb 9, 2010	Feb 11, 2010
• Barbados	LA, NW,	Feb 17, 2010	Feb 19, 2010
• Suriname	NW, A-Z	Feb 22, 2010	Feb 24, 2010
• St. Vincent & G / SKN	NW, A-Z	Feb 25, 2010	Mar 2, 2010
• St. Lucia	NW, A-Z	Mar 3, 2010	Mar 5, 2010
• Martinique	LA, NW	Mar 8, 2010	Mar 10, 2010
• Antigua & Barbuda	NW, A-Z	Mar 11, 2010	Mar 12, 2010
• Jamaica	LA, NW	April 27, 2010	April 30, 2010
Phase 5: Data Compilation and Analysis	NW, LA	March 3, 2010	May 26, 2010
Phase 6: Draft Report	NW, LA	May 1, 2009	June 7, 2010
Phase 6: Presentation to Task Force	NW, LA		TBD
Phase 7: Final Report	NW, LA		TBD

NW=Noel Watson, LA=Lucia Angelo. A-Z=A-Z Researcher, Caribbean Export=Caribbean Export

Appendix III: Harmonized System Codes (HS) Commodities and UNCPC Product Classifications (Version 1)

1. Harmonized System Codes (HS) Commodities

Please click on any of the following below for further breakdown:

- 01-05 [Animal & Animal Products](#)
- 06-15 [Vegetable Products](#)
- 16-24 [Foodstuffs](#)
- 25-27 [Mineral Products](#)
- 28-38 [Chemicals & Allied Industries](#)
- 39-40 [Plastics / Rubbers](#)
- 41-43 [Raw Hides, Skins, Leather, & Furs](#)
- 44-49 [Wood & Wood Products](#)
- 50-63 [Textiles](#)
- 64-67 [Footwear / Headgear](#)
- 68-71 [Stone / Glass](#)
- 72-83 [Metals](#)
- 84-85 [Machinery / Electrical](#)
- 86-89 [Transportation](#)
- 90-97 [Miscellaneous](#)
- 98-99 [Service](#)

General Link: <http://www.foreign-trade.com/reference/hscode.htm>

2. United Nations Central Product Classification Version 1

Please click on any of the following below for further breakdown:

- [0](#) - Agriculture, forestry and fishery products
 - [01](#) - Products of agriculture, horticulture and market gardening
 - [02](#) - Live animals and animal products
 - [03](#) - Forestry and logging products
 - [04](#) - Fish and other fishing products
- [1](#) - Ores and minerals; electricity, gas and water
 - [11](#) - Coal and lignite; peat
 - [12](#) - Crude petroleum and natural gas
 - [13](#) - Uranium and thorium ores
 - [14](#) - Metal ores
 - [15](#) - Stone, sand and clay
 - [16](#) - Other minerals
 - [17](#) - Electricity, town gas, steam and hot water

- [18](#) - Water
- [2](#) - Food products, beverages and tobacco; textiles, apparel and leather products
 - [21](#) - Meat, fish, fruit, vegetables, oils and fats
 - [22](#) - Dairy products
 - [23](#) - Grain mill products, starches and starch products; other food products
 - [24](#) - Beverages
 - [25](#) - Tobacco products
 - [26](#) - Yarn and thread; woven and tufted textile fabrics
 - [27](#) - Textile articles other than apparel
 - [28](#) - Knitted or crocheted fabrics; wearing apparel
 - [29](#) - Leather and leather products; footwear
- [3](#) - Other transportable goods, except metal products, machinery and equipment
 - [31](#) - Products of wood, cork, straw and plaiting materials
 - [32](#) - Pulp, paper and paper products; printed matter and related articles
 - [33](#) - Coke oven products; refined petroleum products; nuclear fuel
 - [34](#) - Basic chemicals
 - [35](#) - Other chemical products; man-made fibres
 - [36](#) - Rubber and plastics products
 - [37](#) - Glass and glass products and other non-metallic products n.e.c.
 - [38](#) - Furniture; other transportable goods n.e.c.
 - [39](#) - Wastes or scraps
- [4](#) - Metal products, machinery and equipment
 - [41](#) - Basic metals
 - [42](#) - Fabricated metal products, except machinery and equipment
 - [43](#) - General purpose machinery
 - [44](#) - Special purpose machinery
 - [45](#) - Office, accounting and computing machinery
 - [46](#) - Electrical machinery and apparatus
 - [47](#) - Radio, television and communication equipment and apparatus
 - [48](#) - Medical appliances, precision and optical instruments, watches and clocks
 - [49](#) - Transport equipment
- [5](#) - Construction work and constructions; land
 - [51](#) - Construction work
 - [52](#) - Constructions
 - [53](#) - Land
- [6](#) - Trade services; hotel and restaurant services
 - [61](#) - Sale, maintenance and repair services of motor vehicles and motorcycles
 - [62](#) - Commission agents' and wholesale trade services, except of motor vehicles and motorcycles
 - [63](#) - Retail trade services; repair services of personal and household goods
 - [64](#) - Hotel and restaurant services
- [7](#) - Transport, storage and communications services
 - [71](#) - Land transport services
 - [72](#) - Water transport services
 - [73](#) - Air transport services

- [74](#) - Supporting and auxiliary transport services
 - [75](#) - Post and telecommunications services
- [8](#) - Business services; agricultural, mining and manufacturing services
 - [81](#) - Financial intermediation services and auxiliary services therefor
 - [82](#) - Real estate services
 - [83](#) - Leasing or rental services without operator
 - [84](#) - Computer and related services
 - [85](#) - Research and development services
 - [86](#) - Legal, accounting, auditing and book-keeping services; taxation services; market research and public opinion polling services; management and consulting services; architectural, engineering and other technical services
 - [87](#) - Business services n.e.c.
 - [88](#) - Agricultural, mining and manufacturing services
 - [89](#) - Intangible assets
- [9](#) - Community, social and personal services
 - [91](#) - Public administration and other services to the community as a whole; compulsory social security services
 - [92](#) - Education services
 - [93](#) - Health and social services
 - [94](#) - Sewage and refuse disposal, sanitation and other environmental protection services
 - [95](#) - Services of membership organizations
 - [96](#) - Recreational, cultural and sporting services
 - [97](#) - Other services
 - [98](#) - Private households with employed persons
 - [99](#) - Services provided by extraterritorial organizations and bodies

General Link: <http://unstats.un.org/unsd/cr/registry/regcst.asp?Cl=9&Lg=1>

APPENDIX IV (a)

PREVIOUS STUDIES

CARIFORUM-FCOR-OCT Task Force on Trade and Investment
Minutes from Task Force Meetings

Chamber of Commerce and Industry of Martinique - Auguiac M., J-M Salmon (2005), « Le potentiel de développement dans la zone Caraïbe du secteur des services aux entreprises de la Martinique ».

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APPENDIX IV (b)

TRADE DATA COLLECTION

Caribbean Export

CARICOM Secretariat

Chambers of Commerce and Industry, Guadeloupe, French Guyana, Martinique

DOMINICAN REPUBLIC

Central Bank

Dirección General de Aduanas

Direction Interrégionale des Douanes Antilles-Guyane

ECLAC/CEPAL

EUROSTAT

IDC

INSEE (Institut National de la Statistique et des Etudes Economiques)

Suriname Ministry of Trade and Industry

Suriname Customs

APPENDIX IV (c)

List of Trading Opportunities and Issues Relating to Cariforum/FCOR/EU Trade identified in from previous studies

In the table below are listed products and services identified in previous studies as opportunities to enhance trade between the FCORs and the CARIFORUM, and in some instances from the region to the EU (as indicated in the 'REMARKS' when applicable).

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
A - Agriculture, forestry and fishing					
A	<u>01 - Crop and animal production, hunting and related service activities</u>	<u>130</u>	Flowers	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade, especially Martinique
A		<u>140</u>	Live animals for farming	EC-ALS	Guadeloupe, Martinique (enough productive capacity to trade)
A	<u>03 - Fishing and aquaculture</u>	<u>300</u>	Fishing	K. Logossah (CEREGMIA, I.F.G. CAR)	French Guiana (enough productive capacity to trade)
A	<u>03 - Fishing and aquaculture</u>	<u>300</u>	Fisheries	Caribbean Export	St Vincent and the Grenadines, The Bahamas, ..
A		<u>300</u>	Lobsters	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade: Jamaica, The Bahamas, St. Vincent and The Grenadines, Antigua & Barbuda, Guyana
B - Mining and quarrying					
B	<u>06 - Extraction of crude petroleum and natural gas</u>	<u>600</u>	Oil and natural gas	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade: Trinidad & Tobago
B	<u>07 - Mining of metal ores</u>	<u>700</u>	Gold	K. Logossah (CEREGMIA, I.F.G. CAR)	French Guiana, Suriname and Guyana (enough productive capacity to trade)
B		<u>729</u>	Alumina,	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade: Jamaica,

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
					Guyana
<u>B</u>	<u>08 - Other mining and quarrying</u>	<u>899</u>	Bauxite	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade: Jamaica, Guyana
<u>B</u>		<u>899</u>	Gypsum	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM countries have productive capacity to foster regional trade: Jamaica, Trinidad & Tobago
<u>B</u>		<u>899</u>	Limestone, Marble, Siliceous	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which Jamaica has productive capacity to foster regional trade (subject to some adjustments in Jamaican mining plants and transport infrastructures)
<u>C - Manufacturing</u>					
<u>C</u>	<u>10 - Manufacture of food products</u>	<u>1000</u>	Food products	CRNM	Could be re-exported to mainland EU through the FCORs
<u>C</u>		<u>1079</u>	Coffee	L. Barfleur (ARK)	Potential exports from Guadeloupe to CARIFORUM
<u>C</u>	<u>11 - Manufacture of beverages</u>	<u>1100</u>	Drinks / Mineral water	L. Barfleur (ARK)	EU products re-exported to the CARIFORUM by the FCOR / Potential exports from Guadeloupe to CARIFORUM
<u>C</u>		<u>1100</u>	Rums, Soft drinks	L. Barfleur (ARK)	Potential exports from Guadeloupe to CARIFORUM and vice versa
<u>C</u>	<u>16 - Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials</u>	<u>1600</u>	Wood treatment	MN Catayée (CCIM), PY Chicot (CRPLC), VEV consulting Task Force	Converging interests for FCORs and CARIFORUM (more specifically between French Guiana and CARIFORUM neighbours)
<u>C</u>	<u>19 - Manufacture of coke and refined petroleum products</u>	<u>1900</u>	Oil and petroleum derived products	L. Barfleur (ARK)	Could be re-exported to mainland EU through the FCORs
<u>C</u>	<u>20 - Manufacture of chemicals and chemical products</u>	<u>2010</u>	Fertilizers	EC-ALS	Guadeloupe, Martinique (enough productive capacity to trade)
<u>C</u>		<u>2020</u>	and other chemicals	EC-ALS	Guadeloupe, Martinique (enough productive capacity to trade)
<u>C</u>	<u>21 - Manufacture of basic pharmaceutical products and pharmaceutical preparations</u>	<u>2100</u>	Health and beauty products	CRNM L. Barfleur (ARK) EC-ALS	Re-exported from the EU or produced in the FCORs Export opportunities for Guadeloupe, Martinique

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
				K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners : DR and Jamaica are major producers of these products
<u>C</u>	<u>26 - Manufacture of computer, electronic and optical products</u>	<u>2600</u>	Electronics,	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade : SVG, SKN, Barbados
<u>C</u>	<u>27 - Manufacture of electrical equipment</u>	<u>2700</u>	Electrical components Radio transistors Refrigerators TV sets	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade : Trinidad & Tobago
<u>C</u>	<u>28 - Manufacture of machinery and equipment n.e.c.</u>	<u>2800</u>	Gas cookers	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade : Trinidad & Tobago
<u>C</u>		<u>2820</u>	AC and Refrigeration	MN Catayée (CCIM) VEV consulting	Martinique, Guadeloupe
<u>D</u>		<u>2800</u>	Solar systems	L. Barfleur (ARK)	Guadeloupe
<u>C</u>	<u>29 - Manufacture of motor vehicles, trailers and semi-trailers</u>	<u>2910</u>	Car assembly	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade : Trinidad & Tobago
<u>C</u>	<u>30 - Manufacture of other transport equipment</u>	<u>3000</u>	Aerospace industry		French Guiana (enough productive capacity to trade)
<u>C</u>	<u>33 - Repair and installation of machinery and equipment</u>	<u>3300</u>	Qualified maintenance (boats, electric tools, medical/ aeronautic/aerospace equipments, ...)	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners: Trinidad & Tobago, Antigua & Barbuda
				VEV consulting	Guadeloupe, French Guiana, Martinique
<u>D - Electricity, gas, steam and air conditioning supply</u>					
<u>D</u>	<u>35 - Electricity, gas, steam and air conditioning supply</u>	<u>3500</u>	Energy	CE- Trade Policy Advisor L. Placide (Ideas to Business), Task Force	French (Guadeloupe, Martinique) are advanced in this matter

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
<u>D</u>		<u>3500</u>	Green energy (geothermic, solar, wind, ...)	EC-ALS	All 3 FCORs, Dominica
<u>E - Water supply; sewerage, waste management and remediation activities</u>					
<u>E</u>	<u>36 - Water collection, treatment and supply</u>	<u>3600</u>	Water Supply and CARILEC	Netherlands Antilles – Dwight Tjin Kon Kiem	There is cooperation going on in those countries
<u>E</u>	<u>38 - Waste collection, treatment and disposal activities; materials recovery</u>	<u>3800</u>	Environmental services (waste treatment & recycling, expertise, ...)	VEV consulting	Converging interests for FCORs and CARIFORUM
<u>F - Construction</u>					
<u>F</u>		<u>4000</u>	Construction services	CRNM L. Barfleur (ARK) VEV consulting	Converging interests for FCORs and CARIFORUM
<u>G - Wholesale and retail trade; repair of motor vehicles and motorcycles</u>					
<u>G</u>	<u>45 - Wholesale and retail trade and repair of motor vehicles and motorcycles</u>	<u>4500</u>	Motorcycles	K. Logossah (CEREGMIA, I.F.G. CAR)	Industrial specificities in which some CARIFORUM and FCORs countries have productive capacity to foster regional trade : Trinidad&Tobago
<u>G</u>		<u>4520</u>	Qualified maintenance (cars,...)	K. Logossah (CEREGMIA, I.F.G. CAR) VEV consulting	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners incl. Guadeloupe, French Guiana, Martinique
<u>G</u>	<u>46 - Wholesale trade, except of motor vehicles and motorcycles</u>	<u>4600</u>	Construction materials	CRNM L. Barfleur (ARK) EC-ALS VEV consulting	Converging interests for FCORs and CARIFORUM
<u>G</u>		<u>4600</u>	CARIFORUM and European goods re-exporting	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners
<u>G</u>		<u>4600</u>	CARIFORUM and European goods re-exporting	EC-ALS	Martinique, Guadeloupe
<u>G</u>		<u>4659</u>	AC and Refrigeration	VEV consulting, MN Catayée	Martinique, Guadeloupe
<u>H - Transportation and storage</u>					
<u>H</u>	<u>47 - Retail trade, except of motor vehicles and motorcycles</u>	<u>4700</u>	Trade, distribution channels	VEV consulting	Guadeloupe, French Guiana, Martinique
<u>H</u>	<u>50 - Water transport</u>	<u>5000</u>	Maritime services, Yachting and marine	St. Lucia CSP	Taking advantage of favourable geographic

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
			services		position
<u>H</u>		<u>5000</u>	Sea transports (persons, merchandise, gas pipeline, transport networking and management expertise,..)	Ms. Koury (CCI Gpe)	Expansion opportunity for existing firms with a view to encourage other trade (goods, services, eg. tourism)
<u>H</u>	<u>51 - Air transport</u>	<u>5100</u>	Air transports (persons, merchandise, gas pipeline, transport networking and management expertise,..)	Ms. Koury (CCI Gpe)	Expansion opportunity for existing firms with a view to encourage other trade (goods, services, eg. tourism)
<u>I - Accommodation and food service activities</u>					
<u>I</u>	<u>56 - Food and beverage service activities</u>	<u>5600</u>	Catering	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners
<u>J - Information and communication</u>					
<u>J</u>	<u>58 - Publishing activities</u>	<u>5800</u>	Printed products	L. Barfleur (ARK)	Win-win opportunities on these CARIFORUM exports to the FCORs
<u>J</u>	<u>58 - Publishing activities</u>	<u>5800</u>	Printed products	Caribbean Export	Example of opportunity: Barbados exports to FCORs
<u>J</u>	<u>59 - Motion picture, video and television programme production, sound recording and music publishing activities</u>	<u>5900</u>	Film and audiovisual	CRNM – Malcolm Spence <u>EC-ALS</u>	Guadeloupe, Martinique
<u>J</u>	<u>62 - Computer programming, consultancy and related activities</u>	<u>6200</u>	ICT	CAIC, CE St. Lucia CSP L. Placide (Ideas to Business)	Area of potential export to the EU for all 3 FCORs and St Lucia
<u>J</u>	<u>63 - Information service activities</u>	<u>6300</u>	Telecommunications, Software, satellite surveillance, ...	EC-ALS K. Logossah (CEREGMIA, I.F.G. CAR)	Guadeloupe, Martinique
		<u>6300</u> <u>0</u>	Communication (postage, courier, servers, ...)	VEV consulting	Guadeloupe, French Guiana, Martinique
<u>K - Financial and insurance activities</u>					
<u>K</u>	<u>64 - Financial service activities, except insurance and pension funding</u>	<u>6400</u>	Finance	K. Logossah (CEREGMIA, I.F.G. CAR) St. Lucia CSP	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners: St

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
					Lucia, Trinidad & Tobago
K		<u>6400</u>	Investment and joint ventures opportunities	C. Benoît (DRCE)	Investing opportunities in the FCORs (in exempted goods such as mineral water, fishing products, fine chocolate, jams,)
<u>M - Professional, scientific and technical activities</u>					
<u>M</u>	<u>69 - Legal and accounting activities</u>	<u>6900</u>	Accounting	Dennis Strong (Task Force), L. Placide (Ideas to Business)	High priority industries because of the existence of regional associations and were best placed to arrive at regional standards and certification. Dominica
<u>M</u>		<u>6900</u>	Legal advice, research	L. Placide (Ideas to Business) ITC	Possibly equal quality and lower cost in Cariforum
<u>M</u>		<u>6920</u>	Forensic accounting	ITC	Professional specialty linked to emerging concerns
<u>M</u>	<u>70 - Activities of head offices; management consultancy activities</u>	<u>7000</u>	Advisory services	MN Catayée (CCIM) L. Placide	
		<u>7000</u>	Professional Services	Task Force EC-ALS	To deal with Mutual Recognition issues
				St. Lucia CSP	
				L. Placide (Ideas to Business)	
<u>M</u>		<u>7000</u>	Back office operations	ITC	The range of administrative and customer support services provided through offshore back office operations is growing rapidly as corporations in developed countries strive to reduce fixed overheads by contracting out routine functions
<u>M</u>		<u>7000</u>	Management Consultancy	ITC	CAIC in collaboration with Caribbean Export is conducting a study to examine the Management Consultancy industry throughout the region.
<u>M</u>		<u>7000</u>	Expertise (certificates,)	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
<u>M</u>		<u>7000</u>	Credit card authorizations Customer call centres Customer services support Data warehousing Electronic publishing Indexing and abstracting services Mailing list management Medical records' management Multilingual offshore call-centre services Remote secretarial services Technical on-line support Hotel reservations, Teleservices	ITC	Back-office operations with higher value-added than basic data entry
<u>M</u>		<u>7000</u>	Legal transcription, Litigation support	ITC	Back-office operations with higher value-added than basic data entry
<u>M</u>		<u>7000</u>	Logistics management	ITC	Manufacturers are increasingly contracting out these services
<u>M</u>		<u>7000</u>	Product design	ITC	Manufacturers are increasingly contracting out these services
<u>M</u>		<u>7000</u>	Web site design and management	ITC	Back-office operations with higher value-added than basic data entry
<u>M</u>		<u>7000</u>	Research and development	ITC	Manufacturers are increasingly contracting out these services
<u>M</u>		<u>7000</u>	Research and technical writing and technical transcription	ITC	Back-office operations with higher value-added than basic data entry
	<u>71 - Architectural and engineering activities; technical testing and analysis</u>	<u>7100</u>	Architecture	L. Placide (Ideas to Business)	
<u>M</u>		<u>7100</u>	Architecture, engineering,	Dennis Strong	High priority industries because of the existence of regional associations and were best placed to arrive at regional standards and certification.
<u>M</u>		<u>7100</u>	Natural disasters risk management, construction norms, ...	(CEREGMIA, I.F.G. CAR)	

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
<u>M</u>		<u>7100</u>	Industrial engineering or industrial design	ITC	Technical assistance to other developing economies linked to experience with commonly used low- and medium-technology production processes
<u>M</u>		<u>7100</u>	Sustainable design	ITC	Professional specialty linked to emerging concerns
<u>M</u>		<u>7100</u>	Urban planners and landscape architects Engineering	K. Logossah	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners
<u>M</u>		<u>7100</u>		EC-ALS	Guadeloupe, Martinique
<u>M</u>	<u>72 - Scientific research and development</u>	<u>7200</u>	Innovation and IP opportunities	CRNM (also see presentation from Martinique Conference)	1. Participation in European Framework Programme, 2. Funding through EDF or ERDF
<u>M</u>		<u>7200</u>	Innovation and IP opportunities	L. Placide (Ideas to Business)	
<u>M</u>		<u>7200</u>	Intelligence gathering	ITC	Professional specialty linked to emerging concerns
<u>M</u>		<u>7200</u>	R&D	EC-ALS	
<u>M</u>		<u>7200</u>	Sustainable development	EC-ALS	
				VEV consulting	
<u>M</u>		<u>7210</u>	Biodiversity,	VEV consulting	Converging interests for FCORs and CARIFORUM
<u>M</u>	<u>73 - Advertising and market research</u>	<u>7300</u>	Advertising,	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners
<u>M</u>		<u>7300</u>	Market research, Telemarketing, Traditional data capture and processing	ITC	Possibly equal quality and lower cost in Cariforum
			(Telecommunications, Telemarketing, Software, satellite surveillance, expertise, ...)	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners
<u>M</u>		<u>7300</u>	Market research	L. Placide (Ideas to Business)	
<u>M</u>	<u>74 - Other professional, scientific and technical activities</u>	<u>7400</u>	Hydraulics	MN Catayée (CCIM) – FCORs (CCI)	Note: Issue of transportation was brought up by Ms. Marie-Jeanne
<u>M</u>		<u>7400</u>	Technology transfers,	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
<u>M</u>		<u>7490</u>	Consulting engineering	ITC	Possibly equal quality and lower cost in Cariforum
<u>M</u>		<u>7490</u>	Translation and interpreters	L. Placide (Ideas to Business)	Also identified by TF
<u>N - Administrative and support service activities</u>					
<u>N</u>		<u>7900</u>	(ecotourism, health tourism, cultural tourism, infrastructures, gastronomy,)	VEV consulting	Converging interests for FCORs and CARIFORUM
<u>N</u>	<u>79 - Travel agency, tour operator, reservation service and related activities</u>	<u>7900</u>	Tourism	Dennis Strong	High priority industries because of the existence of regional associations and were best placed to arrive at regional standards and certification.
<u>P</u>		<u>7900</u>	Tourism	L. Placide (Ideas to Business)	This is already our main service export but there is scope to enhance it through health, education and sports tourism
<u>P</u>				St. Lucia CSP	
<u>P</u>	<u>82 - Office administrative, office support and other business support activities</u>	<u>8230</u>	Trade Missions		
<u>P</u>		<u>8290</u>	Networking		An excellent opportunity for creating business opportunities
<u>P - Education</u>					
<u>P</u>	<u>85 - Education</u>	<u>8500</u>	Education Services	Task Force	(Note restrictions and special requirements of the EU and for health) (clarify)
<u>P</u>				St. Lucia CSP	
<u>P</u>		<u>8549</u>	Training (translation, students exchanges, training related to all-above mentioned activities) Were any CARIFORUM countries mentioned	K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners
<u>P</u>				EC-ALS	Guadeloupe, Martinique
<u>Q - Human health and social work activities</u>					
<u>Q</u>	<u>86 - Human health activities</u>	<u>8600</u>	Health, sanitary (telemedicine, tropical disease, epidemiology, infrastructures, training, ...)	L. Barfleur (ARK)	Win-win opportunities on these CARIFORUM exports to the FCORs

	ISIC Rev. 4		PRODUCT	PUT FORWARD BY	REMARKS
<u>Q</u>				VEV consulting	
<u>Q</u>				K. Logossah (CEREGMIA, I.F.G. CAR)	Niche sectors in which Caribbean countries wish to increase their cooperation with European partners
<u>Q</u>				EC-ALS	Guadeloupe, Martinique
<u>Q</u>		<u>8690</u>	Health and wellness	St. Lucia CSP	
<u>R - Arts, entertainment and recreation</u>					
<u>R</u>	<u>90 - Creative, arts and entertainment activities</u>	<u>9000</u>	Creative Industries	CAIC & CRNM	Area of potential export to the EU
<u>R</u>		<u>9000</u>	Creative Industries Entertainment (festivals, music, literature, plastic arts, jewelry, craftworks, design, ...)	K. Nurse, VEV consulting	Converging interests for all 3 FCORs and CARIFORUM
<u>R</u>		<u>9000</u>	Event management	St. Lucia CSP	
<u>R</u>	<u>93 - Sports activities and amusement and recreation activities</u>	<u>9300</u>	Sport and culture, Sports Tourism	St. Lucia CSP Task Force	
<u>S - Other service activities</u>					
<u>S</u>	<u>95 - Repair of computers and personal and household goods</u>	<u>9511</u>	Qualified maintenance (Computer, and related equipments, ...)	K. Logossah (CEREGMIA, I.F.G. CAR)	Also identified by TF
<u>S</u>		<u>9511</u>	Qualified maintenance (Computer, and related equipments, ...)	EC-ALS MN Catayée (CCIM)	Guadeloupe, Martinique

EC-ALS: study by Angelo-Lesales-Salmon, 2009

ITC: US International Trade Commission

St. Lucia CSP: St. Lucia Coalition of Services Providers

Appendix V:

Perspectives from the Caribbean Farmers Network

Discussion with Mr. Jethro Greene
President of Caribbean Farmers Network

What joint ventures and production partnerships do you think could be fruitful?

Need distributor on the ground in FCOR

- bilingual and understands FCOR
- Could use SLU Consul who is already on the ground

Work with private sector in FCOR to meet standards

- clean and certified to ensure that diseases are not transferred

What are the main barriers to trade?

- Language
- Psychological barriers are main problems within our region
- Transportation
- SPS not a barrier – requirements are the same everywhere so it just has to be done
 - o trading with EU is easier than USA
 - o more problems trading within CARICOM at times e.g. Barbados

What public-private initiatives could be put in place to facilitate trade?

- Representation in the market place to deal with language, culture, help coordinate distribution and ensure collection
- Make sure market requirements are explained and the quality standards are well outlined
- Provide market intelligence on which varieties are best for FCOR markets
- Provision of technical information
- Get more EPA money into the hands of the private sector
- Need to create linkages between agriculture and other sectors such as tourism
- Need strategies to stimulate collaboration and cooperation

What are your perspectives on the EPA?

- EPA could be good if we can design programmes to use the EPA money for capacity building and implementation
- Need to develop capacity of private sector to take advantage of EU market
- Only threat is that large EU corporations could come and take over the market but it is not likely or easy in the Region
- Wants framers to own a major part of the value chain so they are immune from vulnerabilities caused by being dependent on others.
- Need to get involved with International Farmers Organisations in France to fully understand what they want such as
 - IFAD = International Federation of Agricultural Producers (based in France)

How important are Trade Missions?

- Very important if they are directed to identifying specific opportunities that exist
 - Not something general and fact finding
- If there is a specific market opportunity then a mission is appropriate

Appendix VI:

Strategy of Caribbean Export with Respect to the French Caribbean Outermost Regions

Background on Caribbean Export Development Agency (Caribbean Export)

The Mission of Caribbean Export Development Agency (Caribbean Export) is

“To increase the competitiveness of Caribbean countries by providing quality export development and trade and investment promotion services through effective programme execution and strategic alliances.”

Caribbean Export is committed to the achievement of the following four strategic goals:

1. Greater integration of CARIFORUM countries into the multilateral, regional and bilateral trade and investment arrangements through the facilitation of public/private sector dialogue, information exchange and implementation of trade agreements.
2. Enhanced competitiveness of firms by providing or facilitating targeted assistance with trade financing, innovation, trade information, marketing management and promotion in new markets.
3. Strengthened institutional capacities through the provision of:
 - Support for capacity development of selected business support organisations, including technical assistance & training.
 - Assistance with the development and implementation of national and sector strategies.
4. Coordination/Strengthening of regional networks through:
 - Hosting Caribbean Business and Investment Support Network (CARIBISNET)
 - Hosting Secretariat for Caribbean Association of Investment Promotion Agencies (CAIPA)
 - Hosting Database of Business Support Initiatives
 - Coordinating Meetings of the CARIFORUM Regional Preparatory Task Force (RPTF) Task Force for Trade and Investment.

Strategy vis a vis the Martinique, Guadeloupe and French Guiana

Caribbean Export's involvement with the French Caribbean Outermost Regions (FCORs) – Martinique, Guadeloupe and French Guiana is in keeping with the Regional Strategy Paper and Caribbean Regional Indicative Programme (2008-2013). The main objective of CARIFORUM with respect to the French Caribbean is “... to actively and continuously seek to broaden and deepen its cooperation with the DOMs, the OCTs and Latin America.” The policy/strategy includes:

“(i) seeking to establish a formal status for the DOMs and the OCTs in the CARIFORUM process either as observers or as associate members.

(ii) ensuring the existence of continuous platforms for dialogue and action on economic and social issues through CARIFORUM and OECS participation in INTERREG-Caribbean Space 2007-2013 and the establishment and operation of joint Task Forces in agreed areas.

(iii) Promoting OCT/DOMs/CARICOM/CARIFORUM Cooperation through regional projects/programmes involving the "Clovis Beaugregard" task forces grouping Cariforum, the British and Dutch OCTs, the DOMs and the European Commission in the fields of natural disaster management, health (AIDS), interconnections, trade and investments.

(iv) promoting trade and economic and social cooperation between the DOMs and OCTs and individual CARIFORUM States, including in areas covered by the EPA. The EPA provides for joint endeavours to facilitate cooperation involving the EU's outermost regions in all areas covered by the agreement. It also includes the possibility to revise the EPA to bring OCTs within the scope of the agreement.

(v) giving priority to bi-regional cooperation in the larger context of the EU-LAC, in which the EU-Caribbean partnership needs also to be considered.”

Caribbean Export is involved in objectives (ii) (iii) and (iv).

Caribbean Export's mission indicates that its sphere of influence is Caribbean wide. In recent years it has developed a strong link with the FCORs through the CARIFORUM/ FCORs/ OCTs Task Force on Trade on Investment which it chairs. The current membership of the Task Force is comprises:

1. Caribbean Export Development Agency
2. Regional Council of Martinique
3. Regional Council of Guadeloupe
4. Regional Council of French Guiana
5. A representative from the Dutch OCTs
6. A representative from the British OCTs
7. OECS-Export Development Agency
8. A representative of CARIFORUM

Observers

9. CARICOM Secretariat
10. CARICOM Office of Trade Negotiation
11. EU Delegation
12. Caribbean Association of Industry and Commerce (CAIC)
13. Caribbean Development Bank (CDB)

Goal of the Task Force

The goal of the Task Force is to promote cooperation between CARIFORUM, the FCORs and the OCTs in trade and investment that will facilitate and lead to the gradual integration of these countries/territories into the regional and world economies.

Specific objectives of the Task Force

- To increase policy dialogue regarding cooperation in trade and investment
- To increase informal exchanges of information related to the EPA
- To increase the availability of business information about the CARIFORUM/FCORs/OCTs

- To increase the capability for undertaking business facilitation activities through the establishment of a network of Business Support Organisations of CARIFORUM/FCORs/OCTs
- To identify investment opportunities between the CARIFORUM/FCORs/OCTs

Specific Activities of the Task Force to Date

As a result of the closer relationship developed through the Task Force, Caribbean Export has already carried out initiatives with the FCORs including:

- Convening of a workshop on renewable energy in Guadeloupe in 2009 in conjunction with the Regional Council of Guadeloupe
- Convening of a workshop in conjunction with the Regional Council of Martinique in Martinique 23-25 September 2009 which focussed on the Audiovisual and Music Industries
- Signature of a MOU and the development of a trade and investment project “*Invest Karaoke*” between Caribbean Export and the Regional Council of Martinique
- Regular meetings and planning activities with representatives of the FCORs
- Initiated discussions for activities in French Guiana with the General and Regional Councils of French Guiana during a visit by a Caribbean Export Official and Consultants to French Guiana in February 2010.
- Commissioned a study to examine the opportunities for doing business between CARIFORUM States and the FCORs.

These activities clearly reflect the strategic orientation of Caribbean Export towards deepening the relationship between CARIFORUM and the FCORs through facilitating increased trade and investment.

Study on Opportunities for Doing Business Between CARIFORUM States and the FCORs

The Terms of Reference of the study, funded by the EU, highlights (a major component of) the CARIBBEAN EXPORT strategy with respect to the FCORs when it explicitly states that “.....there is the need for a comprehensive study on the trade relationship between CARIFORUM Countries and the FCORs that highlights the business opportunities within each market. This information is essential for the planning of strategies with a view to deepening trade and investment flows between booth parties. The EPA however now provides significant opportunities for increased business between the sub-regions. The Services and Investment Chapters allow for increased opportunities that were hitherto not committed to under formal trading relationship. Additionally the Agreement, now reciprocal in scope, will provide opportunities for FCOR producers and distributors to access the CARIFORUM Markets. The EPA framework can also facilitate increased transfer of knowledge and technology to assist CARIFORUM Firms in meeting standards developed with the European Union. ”

INVEST KARAIBE

Caribbean Export’s strategy vis a vis the FCORs is further reflected in Invest Karaibe which is a Cooperation Project between the Regional Council of Martinique and the Agency which is aimed at

- supporting and promoting the economic, social and cultural development of Martinique, in part through bilateral and multilateral cooperation with CARIFORUM Member States
- increasing the competitiveness of the Caribbean countries by providing quality export development and trade and investment promotion services
- increasing the level of trade and investment between CARIFORUM Member States and Martinique

Actions

In the Invest Karaibe Agreement, the Parties to the Agreement basically agree to actions a set of actions that will

- facilitate access to information and provide high quality services to promote trade and investment
- support entrepreneurship, the creation and development of businesses in particular SMEs – and supporting the expansion of their activities at the regional level. These actions will include the planning and execution of Trade Missions
- utilize ICT to foster the development of networks and encourage cross border communication
- involve capacity building initiatives for the Regional Council of Martinique and Caribbean Export that will facilitate implementation of this project and deepen their level of cooperation.

Structure of the partnership

The structure of the partnership would revolve around the activities of a Steering Committee and a Technical Committee, each Committee would comprise partners.

Appendix VII

Supporting Spreadsheets

Due to the size of the spreadsheets containing the raw trade data and analysis, these spreadsheets have been submitted separately and will be distributed by Caribbean Export either by email or on a CD-ROM. The following outline explains how the spreadsheets are organized and their contents.

CARIFORUM Data

The compilation of supporting spreadsheets for CARIFORUM data is organized in four (4) sub-folders:

1. Export File:

This folder consists of 12 spreadsheets containing the export data from the each country to all three FCOR territories colour-coded according to the HS Code categories. Each spreadsheet will contain between one (1) and four (4) worksheets labeled according to the year for which the trade data is provided.

2. Import File:

This folder consists of 12 spreadsheets containing the import data of each country from all three FCOR territories colour-coded according to the HS Code categories. Each spreadsheet will contain between one (1) and four (4) worksheets labeled according to the year for which the trade data is provided.

3. CARIFORUM Data – excl. BAH+DR+HAITI

This folder consists one (1) spreadsheet with five (5) worksheets, three (3) containing the combined exports of the CARICOM Countries to the FCORs for the period 2006-2008 and the other two (2) containing the combined data according to HS categories and countries.

4. CARIFORUM Data – plus BAH+DR+HAITI

This folder contains one (1) spreadsheet with two (2) worksheets, one (1) with the HS Category totals for the CARICOM countries plus Dominican Republic, Bahamas & Haiti, and the other with the individual country export totals for CARICOM plus Dominican Republic, Bahamas & Haiti.

FCOR Data

The compilation of supporting spreadsheets for FCOR data is organized in three (3) main spreadsheets:

1. A- Detailed Export Data by Country 2005-2008

This spreadsheet consists of 21 worksheets, each containing the export data for the country name by which it is labelled. It includes the export data of the CARIFORUM countries (including the Dominican Republic, the Bahamas and Haiti) to the FCOR for the period 2006-2008 and the export data for all three FCOR territories to CARIFORUM for the same period.

2. B – Combined Trade Export Analysis by Categories 2005-2008

This spreadsheet consists of five (5) worksheets, four (4) containing the compilation of individual CARIFORUM exports to the FCOR for the year by which it is labelled and one (1) with the total exports for CARIFORUM for all years (2006-2008).

3. C- Combined FCOR Trade Analysis by Categories 2006-2008

This spreadsheet contains (four) 4 worksheets, three (3) containing the annual exports (2006-2008) of each FCOR territory organized according to HS category to CARIFORUM and one (1) with the total exports for all three (3) years.