BARBADOS PRIVATE SECTOR ASSOCIATION

BARBADOS PRIVATE SECTOR TRADE TEAM

A DIVISION OF THE BARBADOS PRIVATE SECTOR ASSOCIATION

BUILDING PRIVATE SECTOR CAPACITY TO INCREASE EXPORTS

FINAL REPORT OF THE CONSULTANCY

Prepared for the Barbados Private Sector Association (BPSA) with the support of the IADB project "Building Capacity to increase exports"

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MIN Multilateral Investment Fund Member of the IDB Group

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1. BACKGROUND

The Barbados Private Sector Association (BPSA) has secured funding from the Inter-American Bank (IADB) Multilateral Investment Fund (MIF) to assist in funding four important projects that will strengthen its role as a key participant in public policy debates affecting private sector development and at the same time be able to increase awareness of changes and challenges that confront the sector. These are:

1. Improving private sector development and competitiveness;
2. Providing information on the challenges and opportunities of the EPA to business owners, managers and workers;
3. Building capacity to increase exports; and
4. Supporting the Institutional strengthening of the BPSA.

The suite or projects are located within the current context of ongoing multiple trade negotiations between CARICOM and CARIFORUM countries and key trading partners in a global environment marked by uncertainty. Traditional trade preferences enjoyed by Caribbean countries have given way to demands for a more transparent and reciprocal framework, which embraces the modern realities for all countries of trade in services and the need for attraction of foreign direct investment. The foregoing are key features of the 2008 CARIFORUM-European Community (EC) Economic Partnership Agreement (EPA) concluded against the backdrop of universal concerns about intellectual property and mutual interests in technology as well as technical and cultural cooperation.

The Role and Function of the BPSA

The Barbados Private Sector Association (BPSA) is an umbrella association of associations such as the Barbados Manufacturers' Association (BMA), Barbados Hotel and Tourism Association (BHTA), Barbados Chamber of Commerce (BCOC) and the Barbados Small Business Association (BSBA). It plays a key role in advocating and lobbying for appropriate private sector development and competitiveness policy reforms and helps its member organizations understand and take advantage of the opportunities of the EPA and other trade agreements In order to help the Barbadian private sector take advantage of regional and global integration. In this regard, the BPSA is the recognised private sector representative in the public-private sector dialogue convened by the Government and the labour movement, that is, the Social Partnership (SP).

About this report

The purpose of this report is to provide a final report on the implementation of the consultancy 'Building Capacity to Increase Exports', undertaken during the period between June and December 2012. The report reviews the activities undertaken within the consultancy with reference to their relevant dates, their scope and achievements and in relation to the original

consultancy objectives and workplan. The deliverables and overall initial results of these deliverables are summarized in addition to challenges to implementation of the consultancy which may provide useful reflection for future similar undertakings. The report concludes with conclusions and recommendations and an archive of project documents related to the project, included within the appendices for reference.

Project Purpose and Objectives

The overall **goal** of the project was to improve effectiveness and competitiveness of Barbados' private sector. Its **purpose** was to strengthen the capacity of the BPSA to support the private sector of Barbados in promoting private sector development and competitiveness while assisting its members to maximize on the benefits resulting from regional and global integration. The project aimed to provide technical assistance to help firms in selected sectors define and take advantage of opportunities to export to the European market, while understanding the EPA's provisions and technical requirements contained therein. Consistent with the terms of reference, special emphasis was directed to non-tariff measures, standards related to health, the environment, consumer information, regional content (origin), import licensing, labelling and packaging, and other access requirements not reflected in tariffs.

Terms of Reference

The terms of reference for the consultancy are shown at Appendix A. In a project outline including a draft workplan, submitted to the BPSA at project initiation, it was noted that the terms of reference outlined an ambitious scope of work aimed at providing five detailed studies, with accompanying export guides and action plans, within a three month time frame. It further noted that the quality of results would be dependent on the availability of stakeholders for consultation and their willingness to approve strategic directions for further detailed research. Collaboration with a Senior Expert with additional skills sets which add value to the research was also proposed to enhance the value to stakeholders, while ensuring that research activities can be channelled into action plans within the shortest possible period of time. This outline and workplan are included as Appendix B to the report.

The wording of the original terms of reference which required the inclusion of the preparation of economic feasibility studies as a component of the export guides and action plans was eliminated based on initial discussions with the BPSA concerning the constraints of time, budget and available data to support the undertaking an accurate and meaningful economic modeling exercise leading to conclusions on feasibility. Once agreed within the contract, there was no deviation from the terms of reference. Stakeholders were in all instances available for consultation through workshops and focus groups and the staff of the BPSA proved to be

exceptional in their prompt and focused facilitation of all the project's activities and provision of counterpart support to and feedback on the project's activities. The original time frame was extended by mutual agreement at no cost to the project, based on a request made at the end of October 2012. The need for an extension arose in response to the initial findings of the research, which identified a significant number of complex technical regulations affecting the value chain in priority sectors selected for research. The no-cost extension to the time frame was also agreed to accommodate availability of the consultant and the conflict posed by competing activities and events targeting the Barbadian private sector.

Deliverables

Consistent with the terms of reference, the deliverables of the current project, completed over a six month period between June and December 2012, which have been completed to date, are:

i. Five sector studies analyzing current comparative advantages and market demand in European markets;
ii. Identification of technical barriers to entry, market and regulatory requirements, including sanitary, safety and logistics considerations under the EPA for selected products;
iii. Export guides and action plans for each sector with specific firm-level recommendations on the activities needed to increase productivity, upgrade products and increase exports;
iv. A framework for continued assistance to other sectors and SMEs interested in pursuing export strategies.

2. ACTIVITIES UNDERTAKEN THROUGH THE CONSULTANCY

Project Initiation

The project commenced in the first week of May with the offer of a draft contract on May 2, 2012. Following a telecom between the Lead Consultant and the CEO and Trade Consultant and BPSA, the contract was finalized on May 8, 2012. A project outline was presented including an initial workplan (Appendix C) which was agreed by both parties as a sound approach to project implementation. A draft outline framework for the various reports was developed and presented to the client for discussion and approval before proceeding with the research. Discussions were held with the client to discuss the format and approach to the stakeholders workshops and focus groups which were critical to the refining the research. This outline is shown in Appendix D. This outline was updated and refined as the project progressed through discussion.

An initial field mission in Barbados was conducted in the week of May 14th to undertake discussion meetings with the BPSA Project Steering Committee with a view to identifying the priority sectors for research. The priority sectors that were identified to be included in the research were:

i. Arts and Crafts (Barbadian cultural goods)
ii. Specialty Food (preserved) including condiments, sauces, jams, jellies, etc.
iii. Marketing and Distribution Tourism of Services
iv. Fresh foods (poultry, chicken, milk, etc.)
v. Beverages

Wherever possible, the priority EU-27 markets identified for special focus would be:

i. France (including the FCORs of Martinique and Guadeloupe)
ii. The Netherlands (including the Dutch OCTs of Aruba, Curacao)
iii. Germany (an emergent market of importance for Barbadian manufacturing and tourism)

Given the short time frame allocated to the research, Ms. Liesl Harewood was contracted as a Senior Consultant, to support the articulation of the project deliverables in the area of services (marketing and distribution of tourism services) and provide special research support in connection with the French market.

Literature review

A comprehensive literature review was undertaken based on the compilation of a bibliography of previous existing studies related to Barbados exports as well as EU markets. A partial bibliography for the research is included as Appendix E. The review of literature provided an orientation to trends in the EU market, specific issues facing the EU markets and industries in the selected product sectors, the organisation of EU industries as well as an indication of the strategic context and challenges for the Barbadian sectors in seeking to develop sustainable exports.

Sector Studies

The sector studies were based largely on secondary research of documents produced by EU authorities such as the Centre for Promotion of Imports (CBI) and other external authorities such as the World Tourism Organization. The sector studies encompassed studies of market demand, trends, definition of the value chains, purchasing patterns influencing consumers and potential market segments for Barbadian products. EU imports and exports were quantified with the assistance of data obtained from the TradeMaps database operated by the

International Trade Centre (ITC) in Geneva. The studies concluded by summarizing critical success for exporting to the EU.

Identification of technical barriers to entry, market and regulatory requirements

The identification of technical barriers to entry, market and regulatory requirements proved to be the largest scope of work within the consultancy. The legal parameters for market entry and general information on the business environment in the EU were researched in order to unearth potential obstacles to market entry for Barbadian firms which might exist from this perspective. A series of guides were prepared for exporters and potential exporters as follows:

- *Doing Business with the EU*
- *Doing Business with France*
- *Doing Business with Germany*
- *Doing Business with the Netherlands.*

An inventory of market-specific technical regulations and the systems used for their management and monitoring was undertaken in relation to the value chains for the various products. These were compiled in the form of two reports:

- *Exporting to the EU: Standards, Technical Regulations and SPS Measures: Beverages, Fresh Food and Processed Food Products:* comprising the review of 38 mandatory legislative market requirements harmonized across the EU-27
- *Exporting to the EU: Standards, Technical Regulations and SPS Measures: Arts and Crafts Products:* comprising the review of 18 mandatory legislative market requirements harmonized across the EU-27.

Regulatory barriers to the development of tourism services, including mutual recognition agreements (MRAs) and the EU Package Travel Directive were included in the Sector Study on Marketing and Distribution of Tourism Services.

Consultations

Based on the findings of the research, a workshop on standards, technical regulations and SPS measures for Barbadian producers interested in exporting to the EU was held on October 16, 2012 at the Cave Hill Business Centre Conference Room. It was attended by about 20 persons from companies producing beverages, fresh food, craft and processed food, who participated in the interactive discussions enthusiastically. Sector specific focus groups were also held in the same week for tourism stakeholders (October 17th) at the offices of the Barbados Hotel and Tourism Association (BHTA) and processed/ specialty food and fresh food stakeholders (October 19th) at the offices of the Barbados Manufacturers Association (BMA). The objectives of the focus groups were to present the initial findings of the sector studies and to undertake a guided and facilitated SWOT Analysis (strengths, weaknesses, opportunities, threats) discussion

in order to identify the best positioning of the sector for market entry to the EU. A focus group for the craft sector was held at the offices of the BMA on November 23rd. Consultations were also held with logistics service provider Laparkan and the Barbados National Standards Institute (BNSI).

Export guides and action plans

Five export guides and action plans were completed, indicating the strategic direction to be pursued for entering the EU market, recommendations based on the research findings and time based action plans. The SWOT Analysis was an integral part of the development of the guides and action plans.

Framework for Future Assistance

Consistent with the terms of reference, framework recommendations were provided for future assistance by the BPSA to sectors in both goods and services.

3. DELIVERABLES AND OVERALL RESULTS

Table 1 below shows a summary of the deliverables and their immediate impact. It is expected that longer term impact of the consultancy will be felt among the Barbadian private sector in the near future through their increased awareness of, and consideration of, business opportunities in the EU.

TABLE 1: DELIVERABLES AND OVERALL RESULTS	
DELIVERABLE	**OVERALL RESULTS**
Sector Studies	Compilation of information on the EU market, including trade data on exports and imports; identification of value chains and levels of competition which to be expected by exporters from EU industries
Identification of technical barriers to entry, market and regulatory requirements	Inventory of regulations, mandated by legislation impacting the selected sectors, which are harmonized across EU-27 as the minimum requirements for market entry
Consultations	Dialogue with private sector on implications of exporting to EU ; public discussion and interaction on research findings; agreement by private sector groups to support the formation of Working Committees to drive export cluster development
Export guides and action plans	Roadmap for export clusters to enter EU market based on current position and immediate action plans
Framework for Future Assistance	Roadmap for BPSA to continue engagement with other private sector groups based on lessons learned through the consultancy

4. CHALLENGES TO IMPLEMENTATION OF CONSULTANCY

Short time frame for implementation

As indicated previously, the short time frame allocated to the research and the fixed budget for the consultancy created significant pressures on the consultants to deliver work with quality and accuracy within the proposed time frame.

Uneven Scope of Work tied to deliverables

As indicated earlier, the overall scope of work was ambitious, however the sector studies which each represented 5% of the overall project value, were required to include market studies according to the terms of reference. Being based on secondary research, the preparation of these studies was extremely time consuming, in comparison with the export guides and plans or other deliverables which represented higher portions of the overall project value.

Study Fatigue on the part of stakeholders

During the stakeholder consultation stage, the Team was informed by stakeholders that numerous similar studies had recently been carried out in Barbados to no avail. In some cases, there was a strong sense of 'study fatigue' – it was clear that stakeholders had given up their time on numerous occasions in order to support the development of Barbadian exports and the services sector, only to have the final study filed away and no actions taken. This meant that on some occasions, consultation time was spent convincing stakeholders that the project was not a repeat of other studies and that concrete actions would be taken as a result of their inputs. In general, stakeholders were still willing to participate, although the numbers in attendance at the stakeholder session were smaller than originally anticipated.

5. CONCLUSIONS AND RECOMMENDATIONS

In general, the project has achieved its objective of contributing to a greater understanding of the EU-CARIFORUM EPA amongst the Barbadian business community. The substantive and very active debates among the relevant stakeholders at the workshops contributed to the conclusions and recommendations that were presented in the reports, ensuring local ownership and a greater chance of actions being implemented.

The main handicaps affecting the export capacity of Barbadian industries in the EU markets were discussed by participants at the validation seminars. In general, the most important handicaps were related to the capacities of SMEs and micro-enterprises to understand the EPA provisions and make use of ongoing government programmes and facilities to increase their participation in trade. In this respect, difficulties faced by SMEs in meeting the requirements of private and public institutions that sought to assist and the capacity of public institutions to provide relevant support were identified as key issues. A lack of understanding of the EPA's complex structure is impacting on the export capacity of large and small services companies and preventing them from fully benefiting from the EPA's provisions in their favour.

Non-tariff barriers and the local capacity to provide the necessary traceability and quality assurance guarantees to buyers are significant obstacles to EU market penetration, as are the challenges of workforce development and the costs of training and certification for SMEs. The open debates and frank recommendations made at stakeholders meetings illustrated the private sector's interest in further guidance and support from the BPSA, both to strengthen their capacities and to overcome existing limitations in order to ensure that Barbadian exporters are able to fully benefit from the EPA. The private sector is most concerned about overcoming trade barriers, the application of provisions affecting the export of specific services and sustained access to selected EU markets including the UK, France and the Netherlands, as well as the potential financial costs of doing business in the EU.

The BPSA's active engagement of in the coordination and implementation of this project reaffirms its role as the focal point for trade and private sector support in Barbados. The project has opened a direct link with exporters and business operators, which paves the way for stronger support to advocacy and the building of competitiveness among Barbadian firms. There will be need for ongoing support and handholding to strengthen the private sector's response to the tangible opportunities emerging from the EPA Agreement. It is hoped that the results of the project will be a valuable departure point for the Barbadian private sector to claim a well deserved place among the stronger trading nations of the Caribbean and the world.

APPENDIX A CONSULTANT TERMS OF REFERENCE

TERMS OF REFERENCE

Building Private Sector Capacity to Increase Exports

BACKGROUND

The current context of eroding trade preferences, multiple on-going trade negotiations and significant new obligations assumed under the CARICOM Single Market and Economy (CSME) and the CARIFORUM-European Community (EC) Economic Partnership Agreement (EPA) and other trade agreements call for stronger trade-related institutions and increased participation of the private sector in trade negotiations and policy implementation.

The recently signed EPA between CARIFORUM and the EC present a set of opportunities and challenges for Barbados. Under the Agreement, the EC provided enhanced and new market access for CARIFORUM imports and CARIFORUM has committed to liberalising up to 86% of its imports from the EC over a 25 year transition period. This transition away from preferential arrangements to a World Trade Organization (WTO) compatible reciprocal, open trading regime presents a number of advantages to CARIFORUM states: 1) it widens access to EC markets for almost all products; 2) it potentially lowers the price of EC inputs and intermediate goods to local industries; 3) it reinforces the current regional integration effort; and 4) it challenges governments to reduce the preferences and incentives that have protected certain industries forcing the private sector to become more competitive.

Even though the EPA brings important opportunities, it also brings a number of challenges: 1) concern that Caribbean markets will be flooded by goods and services from the EC; 2) concern about non-tariff barriers (NTBs) to trade in the EC; 3) uncertainty about the readiness of the business climate to support export-led growth; and 4) insecurity about the private sector's capacity to compete, diversify and innovate in a global liberalized market. Therefore the benefits deriving from free trade will be neither achievable nor sustainable without a business-friendly environment, and a strong business sector that is ready to face the significant challenges that will result from regional integration and international trade liberalization.

In order to help the Barbadian private sector take advantage of regional and global integration, the Barbados Private Sector Association (BPSA) plays a key role in advocating and lobbying for appropriate private sector development and competitiveness policy reforms and helps its member organizations understand and take advantage of the opportunities of the EPA and other trade agreements. In this regard, the BPSA is the recognized private sector representative

in the public-private sector dialogue convened by the Government and the labour movement, that is, the Social Partnership (SP).

In this context, the BPSA has secured funding from the Inter-American Bank (IADB) Multilateral Investment Fund (MIF) to assist in funding four important projects that will strengthen its role as a key participant in public policy debates affecting private sector development and at the same time be able to increase awareness of changes and challenges that confront the sector.
These are:

1. Improving private sector development and competitiveness;
2. Providing information on the challenges and opportunities of the EPA to business owners, managers and workers;
3. Building capacity to increase exports; and
4. Supporting the Institutional strengthening of the BPSA.

OBJECTIVES

The overall **goal** of the project is to improve effectiveness and competitiveness of Barbados' private sector. The **purpose** is to strengthen the capacity of the BPSA to support the private sector of Barbados in promoting private sector development and competitiveness and at the same time help its members to maximize on the benefits resulting from regional and global integration.

This component seeks to provide technical assistance to help firms in selected sectors take advantage of these opportunities to export to the European market and understanding the EPA's provisions and technical requirements contained therein. Special attention will be given to non-tariff measures, standards related to health, the environment, consumer information, regional content (origin), import licensing, labelling and packaging, and other access requirements not reflected in tariffs.

DELIVERABLES

- Five sector studies analyzing current comparative advantages and market demand in European markets;

- Identification of technical barriers to entry, market and regulatory requirements, including sanitary, safety and logistics considerations under the EPA for selected products;

- Export guides and action plans for each sector with specific firm-level recommendations on the activities needed to increase productivity, upgrade products and increase exports;

- A framework for continued assistance to other sectors and SMEs interested in pursuing export strategies.

REQUIREMENTS

The selected consultant(s) will be required to undertake the following activities:

1. Agree on a project outline and work plan with the Project Coordinator to ensure a clear understanding of objectives and deliverables;
2. The selection of the sectors in consultation with the BPSA Project Steering Committee;
3. Prepare export guides and action plans which will define the feasibility of export business—linking supply and demand—as the basis on which the business plans will be drawn up, including:
    i. description of the market/product to be assisted and its characteristics;
    ii. current conditions of the enterprises for serving this market; and
    iii. problems or barriers to be overcome for the business to be realized.
4. Finalize all drafts.
5. The Consultancy will be undertaken by a consultant(s) with experience in trade policy and trade facilitation:
    - A professional track record in strategic business development and trade policy generally.
    - Relevant university degree;
    - More than 5 years of experience in private sector development;
    - Excellent command of English;
    - Effective networking skills;
    - Excellent oral and written communication skills;
    - Ability to work effectively in a dynamic environment;
    - Excellent computer skills; and
    - Excellent organisational skills

REPORTING ARRANGEMENTS

The consultant will report to the BPSA Project Coordinator. This Coordinator will report to the Project Steering Committee as well as to the IDB team leader as required, on project progress and performance. The Project Steering Committee will comprise the Chief Executive Officer of the BPSA and 5 other members who are representatives of some of the associations under the umbrella of the BPSA.

QUALIFICATIONS AND EXPERIENCE

The consultant should possess:

- University Degree (preferably at the Masters level or above) in international trade, economics, development or a related field;
- Previous experience in providing direct technical support to individual firms and business support organisations;
- Excellent command of English;
- Excellent oral and written communication skills;
- Ability to work effectively in a dynamic environment;
- Prior experience working on aid for trade projects;
- Excellent computer skills;
- Ability to work within strict deadlines; and
- Excellent organisational skills.

TERMS & CONDITIONS

The intended commencement date is **May 8th, 2012**. The duration of the assignment should not exceed three (3) months.

ALL QUESTIONS REGARDING THE TERMS OF REFERENCE SHOULD BE SENT BY E-MAIL TO: Mr. Joel Richards: EMAIL joel.richards@tradeteam.bb. Telephone (246) 430- 6541.

APPENDIX B PAYMENT SCHEDULE

Deliverable/Activity	Percentage Disbursement
Signing of contract	20% (Bds$)
Sector Studies	5% per study (25%)
Identification of Technical Barriers & Regulatory Requirements	15% (Bds$)
Export Guides and Action Plan	20% (Bds$)
Export Strategy Framework	10% (Bds$)
Final Report	10% (Bds$)

APPENDIX C PROJECT OUTLINE

THE BARBADOS PRIVATE SECTOR ASSOCIATION (BPSA)

PROJECT OUTLINE
(DRAFT)

BUILDING PRIVATE SECTOR CAPACITY TO INCREASE EXPORTS

A PROJECT SUPPORTED BY THE

INTER-AMERICAN DEVELOPMENT BANK

MULTILATERAL INVESTMENT FUND (MIF)

MAY 2012

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1. BACKGROUND

The Barbados Private Sector Association (BPSA) has obtained funding from the Inter-American Bank (IADB) Multilateral Investment Fund (MIF) to assist in funding four important projects that will strengthen its role as a key participant in public policy debates affecting private sector development and at the same time be able to increase awareness of changes and challenges that confront the sector. These are:

i. Improving private sector development and competitiveness;
ii. Providing information on the challenges and opportunities of the EPA to business owners, managers and workers;
iii. Building capacity to increase exports; and
iv. Supporting the Institutional strengthening of the BPSA.

Context

The current context of eroding trade preferences, multiple on-going trade negotiations and significant new obligations assumed under the CARICOM Single Market and Economy (CSME) and the CARIFORUM-European Community (EC) Economic Partnership Agreement (EPA) and other trade agreements call for stronger trade-related institutions and increased participation of the private sector in trade negotiations and policy implementation.

The recently signed EPA between CARIFORUM and the EC present a set of opportunities and challenges for Barbados. Under the Agreement, the EC provided enhanced and new market access for CARIFORUM imports and CARIFORUM has committed to liberalising up to 86% of its imports from the EC over a 25 year transition period. This transition away from preferential arrangements to a World Trade Organisation (WTO) compatible reciprocal, open trading regime presents a number of advantages to CARIFORUM states: 1) it widens access to EC markets for almost all products; 2) it potentially lowers the price of EC inputs and intermediate goods to local industries; 3) it reinforces the current regional integration effort; and 4) it challenges governments to reduce the preferences and incentives that have protected certain industries forcing the private sector to become more competitive.

Even though the EPA brings important opportunities, it also brings a number of challenges: 1) concern that Caribbean markets will be flooded by goods and services from the EC; 2) concern about non-tariff barriers (NTBs) to trade in the EC; 3) uncertainty about the readiness of the business climate to support export-led growth; and 4) insecurity about the private sector's capacity to compete, diversify and innovate in a global liberalised market. Therefore the benefits deriving from free trade will be neither achievable nor sustainable without a business-friendly environment, and a strong business sector that is ready to face the significant challenges that will result from regional integration and international trade liberalization.

Role of the BPSA

In order to help the Barbadian private sector take advantage of regional and global integration, the Barbados Private Sector Association (BPSA) plays a key role in advocating and lobbying for appropriate private sector development and competitiveness policy reforms and helps its member

organizations understand and take advantage of the opportunities of the EPA and other trade agreements. In this regard, the BPSA is the recognised private sector representative in the public-private sector dialogue convened by the Government and the labour movement, that is, the Social Partnership (SP).

Barbados Exports of Goods to Europe

According to data available from the International Trade Centre (ITC), in 2010, imports of all products by Central and Eastern Europe (CEE) from the rest of the world were valued at US$652.83 billion. The contribution of Barbados exports to this figure was estimated to be limited to US$885,000 as shown in Table 1 below. The main product lines exported (including transhipped products) were:

- Optical, photo, technical, medical, etc apparatus
- Pharmaceutical products
- Mineral fuels, oils, distillation products, etc
- Beverages, spirits and vinegar
- Tobacco and manufactured tobacco substitutes
- Commodities
- Plastics and articles thereof.

Table 1: Barbados's exports to Central and Eastern Europe (CEE) (US$)000"s)
Source: International Trade Centre (ITC) TradeMaps

Product code	Product label	Value in 2006	Value in 2007	Value in 2008	Value in 2009	Value in 2010
TOTAL	**All products**	**848**	**1016**	**1002**	**1648**	**885**
'90	Optical, photo, technical, medical, etc apparatus	826	987	904	1488	741
'30	Pharmaceutical products	13	22	63	103	92
'27	Mineral fuels, oils, distillation products, etc	0	0	0	0	27
'22	Beverages, spirits and vinegar	0	0	2	13	10
'24	Tobacco and manufactured tobacco substitutes	0	0	0	6	8
'99	Commodities not elsewhere specified	0	0	0	0	5
'39	Plastics and articles thereof	4	0	13	0	1

The main importing markets for products exported by Barbados in 2010 were the United Kingdom, Netherland Antilles, France, Germany, Italy, the Netherlands and Switzerland. With some experience in export of products to Central and Eastern Europe, it is clear that the potential exists to increase the volume of exports from Barbados, while diversifying the range of indigenous product lines exported to European territories. The selection of priority sectors, product lines and

markets for focus in developing new indigenous exports will be a key component of this consultancy.

Barbados Exports of Services to Europe

According to data available from the International Trade Centre (ITC), in 2010, Barbados exported services valued at US$1.093 billion to the world. Leading services sectors in 2009 were the traditional travel and transportation sectors as well as other business services. Given the experiences in service exports and the significant levels of human capital available in Barbados, there are excellent prospects to increase services exports; particularly in non-traditional areas. The Barbados Coalition of Service industries has been actively involved in export market assessment and market penetration activities which directly targeted the European market in preparation for opportunities arising from the EPA agreement. The preliminary results of these activities and lessons learned will be a key component in shaping plans for future services exports.

Table 2: Barbados's services exports to the world (US$)000"s)
Source: International Trade Centre (ITC) TradeMaps

Code	Service label	Exported Value in 2006	Exported Value in 2007	Exported Value in 2008	Exported Value in 2009	Exported Value in 2010
'200	**Total services**	**1452850**	**1640700**	**371079**	**1464022**	**1093204**
'236	Travel	1056770	1199090	466	1068659	1051711
'205	Transportation	27320	36720	30715	40803	41493
'245	Communications services	27150	13400	5493	26324	na
'249	Construction services	3500	13020	2353	11850	na
'253	Insurance services	92100	125250	63086	68133	na
'260	Financial services	38120	77400	43779	42774	na
'262	Computer and information services	20600	11490	7815	11759	na
'266	Royalties and license fees	4190	390	3886	2524	na
'268	Other business services	158280	129490	173256	153911	na
'287	Personal, cultural and recreational services	70	810	489	111	na
'291	Government services, n.i.e.	24740	33650	30828	30210	na

2. OBJECTIVES OF THE CONSULTANCY

The objective of the consultancy is to provide technical assistance to help firms in selected sectors take advantage of these opportunities to export to the European market and understanding the EPA's provisions and technical requirements contained therein. Special attention will be given to non-tariff measures, standards related to health, the environment, consumer information, regional content (origin), import licensing, labelling and packaging, and other access requirements not reflected in tariffs. This objective is related to the wider overall **goal** of the project is to improve effectiveness and competitiveness of Barbados' private sector.

3. COMMENTS AND SUGGESTIONS ON THE TERMS OF REFERENCE AND ON COUNTERPART STAFF AND FACILITIES TO BE PROVIDED BY THE CLIENT

The terms of reference outline an ambitious scope of work aimed at providing five detailed studies, with accompanying export guides and action plans, within a three month time frame. The quality of results will be dependent on the availability of stakeholders for consultation and their willingness to approve strategic directions for further detailed research. Collaboration with a Senior Expert with additional skills sets which add value to the research is proposed to enhance the value to stakeholders, while ensuring that research activities can be channelled into action plans within the shortest possible period of time.

4. APPROACH, METHODOLOGY AND WORKPLAN

Annex 1 shows a draft workplan for the project's activities. It is envisioned that there will be three pillars or focus areas involved in the approach to achieving the objectives identified in the terms of reference: **sector studies**, **export guides and action plans** for each sector and a **framework for further assistance**. Key methodologies derived from these approaches are summarized in Figure 1.

Figure 1 (below): Approaches and Methodologies for Export Capacity Building proposed in the draft workplan

EXPORT CAPACITY BUILDING		
SECTOR STUDIES • Consultations • Desk research • Verification workshops	**EXPORT GUIDES AND ACTION PLANS** • SWOT Analysis • Gap Analysis • Desk Research	**FRAMEWORK FOR FURTHER ASSISTANCE** • Identify common areas of strengths, weaknesses, opportunities and/or threats across sectors • Draft framework to

5. KEY DELIVERABLES

The key deliverables for the consultancy, as indicated in the Terms of Reference are as follows:

- Five sector studies analysing current comparative advantages and market demand in European markets;
- Identification of market and regulatory requirements, including sanitary, safety and technical barriers to entry, logistics considerations under the EPA for selected products;
- Export guides and action plans for each sector with specific firm-level recommendations on the activities needed to increase productivity, upgrade products and increase exports;
- A framework for continued assistance to other sectors and SMEs interested in pursuing export strategies.
- Final Report.

6. CONSULTANT'S EXPERIENCE

Lead Consultant

Ms. Lisa Callender is a versatile, experienced and innovative freelance consultant with more than six years of experience in leading, managing and implementing short term development projects in the areas of Private Sector Development, Micro, Small and Medium Enterprise (MSME) Development, Trade and Export Development, Product and Market Development and Policy and Strategy Research to improve competitiveness, as well as enterprise training and coaching to achieve creative solutions reflecting stakeholder engagement. She has been involved in the planning and implementation of more than 35 short-term, high- impact, development projects on behalf of institutional clients, including the World Bank (Jamaica), the Commonwealth Secretariat, CARICOM Secretariat, Caribbean Development Bank Technological Consultancy Network, Caribbean Export Development Agency and several private sector associations across the region. Her work experience extends across all CARIFORUM States as well as to Costa Rica and the Republic of Seychelles.

In earlier career experience, she worked as Senior Export Business Advisor and Business Advisor with the Caribbean Export Development Agency for more than five years, supporting the development of more than 300 enterprises across the CARIFORUM region, including Barbados, to realize export development plans in the areas of business upgrading, increasing market access and the enhancement of their competitiveness. As former Regional Manager of the DFID funded UK£17 million Business Linkages Challenge Fund Programme, she supervised the direction of funds towards joint venture projects to impact poverty alleviation and has directly managed the disbursement of cost-sharing grants under the CARIFORUM/ EU 7th and 8th EDF Programmes. She also worked briefly with the former Caribbean Regional Negotiating Machinery (CRNM), now the Office for Trade Negotiations (OTN) within the CARICOM Secretariat, through their Barbados Office. Lisa has a positive track record of implementation of project initiatives with both public and private sector agencies in all the individual CARIFORUM countries, and has worked as a Specialist on SME Development and Private Sector Development in various roles for the past twenty years.

In the process, she has acquired excellent written and verbal cross-cultural communication skills and a good orientation towards information technology and its use for productivity and knowledge management. Her complete curriculum vitae appears as Annex 2 to this proposal.

Senior Expert

Ms. Callender will be supported in the execution of the project by Senior Expert Ms. Liesl Harewood, a dynamic and experienced professional with qualifications in Diplomacy, Law and Global Change, as well as Human Resources. Ms. Harewood has significant experience working with mobilising the services and manufacturing sectors in Barbados for EPA implementation. She has acquired knowledge, skills and experience across several areas including:

- Export Development, Competitiveness and Trade in Services, including tourism;
- EU market orientation for businesses (services and manufacturing), and
- Entrepreneurship and Small Business Development.

She has also been following emergent prospects for greater involvement in intellectual property and value chain organization and development and has special language skills in French. Her updated curriculum vitae will be provided in the inception phase of the project.

ANNEX 1 DRAFT WORKPLAN FOR ACHIEVEMENT OF ACTIVITIES- BUILDING PRIVATE SECTOR CAPACITY TO INCREASE EXPORTS

		MAY			JUNE					JULY				AUG	
	Week ending	11	18	25	1	8	15	22	29	6	13	20	27	3	8
0	Agree on a project outline and work plan with the Project coordinator														
1	**Deliverable 1: Five sector studies analyzing current comparative advantages and market demand in European markets**														
1.1.	**Analysis of current comparative advantages**														
i	Initial consultations with the Project Steering Committee														
	establish broad strategic directions for the sector studies														
	select priority sectors and identify relevant value chains														
	Identify main opportunities and constraints where possible														
ii	Identify and review any relevant reports and studies to inform analysis of sectors and create bibliography for reference														
ii	Create outline framework for sector studies to reflect value chain analysis, benchmarking of comparative and competitive advantage in relation to Barbadian sectors														
iv	Desk research- sector studies														
v	Consultation/ workshop: Presentation of draft sector studies to focus groups of stakeholders														
vi	Finalize sector studies (comparative advantage) based on feedback														
1.2	**Market demand**														
I	Review and analyze data on trade between Barbados and EU														
Ii	Consultations and desk research: select of priority EU markets and key products in each sector														
Iii	Desk research: identify and review trade policy measures by EU country														
Iv	Desk research: market and regulatory requirements														
V	Desk research: safety standards, SPS measures and technical barriers to entry														
Vi	Interviews and desk research: logistics considerations														
Vii	Consultation /workshop: Presentation of draft market demand information to focus groups of stakeholders														
Viii	Finalize market demand studies based on feedback														

2	**Deliverable 2: Export guides and action plans for each sector specific firm-level recommendations on the activities needed to increase productivity**														
I	SWOT analysis of each sector: interviews and focus groups within workshop setting														
Ii	GAP analysis: product upgrading, productivity, supply -side issues, market and regulatory requirements, trade facilitation														
Iii	Strategy recommendations for incremental exports: cost, focus, differentiation														
Iv	Draft export guides and action plans														
V	Consultation /workshop: Presentation of export guides and action plans to focus groups of stakeholders														
Vi	Finalize export guides and plan studies based on feedback														
3	**Deliverable 3: A framework for continued assistance to other sectors and SMEs interested in pursuing export strategies**														
I	Identify areas of common assistance required among sector plans: product upgrading, productivity, supply -side issues, market and regulatory requirements														
Ii	Identify common areas of strengths and opportunities, weaknesses and threats among sectors														
iii.	Agree appropriate format for framework with Project Coordinator and Project Steering Committee														
iv.	Draft assistance framework for review and discussion														
v.	Finalize assistance framework														
4	**Deliverable 4: Final Report**														

milestone
activity

ANNEX 2 CONSULTANT'S CURRICULUM VITAE

LISA Z CALLENDER
9 Grovedale Drive, Kingston 10, Jamaica, WI
Telephone: (876) 330 2485 (mobile) E-mail: lisazilda@yahoo.co.uk

Versatile, experienced and innovative freelance consultant with six years experience leading and managing short term development projects on behalf of institutional clients (including donors and business support organizations) in the areas of Private Sector Development, Micro, Small and Medium Enterprise, Trade and Export Development, Products and Market Development, Competitiveness Policy and Strategy research and enterprise training and coaching to achieve creative solutions reflecting stakeholder engagement. Significant specific experience of manufacturing, services and creative industries development and stakeholder engagement in all CARIFORUM States. Excellent written and verbal communication skills.

CORE COMPETENCIES

- Private Sector Development
- Trade and Export Development
- Product and Market Development
- Small and Medium Enterprise (SME) Development
- Competitiveness Policy and Strategy Research
- Enterprise Training and Coaching

CAREER EXPERIENCE

Independent Consultant **April 2005 to date**

Execution of more than 35 short-term, high impact development projects on behalf of institutional clients, including:

Projects to Improve Private Sector Development and Competitiveness

- Value Chain Analysis of agribusiness and tourism in Jamaica for the World Bank (2010)
- Diagnostic Assessment of the Arts and Crafts Sector in Montserrat for the Caribbean Technological Consultancy Services Network of the Caribbean Development Bank (2009)
- Benchmarking Study for the Target Growth Competitiveness Committee of the Private Sector Development Programme of Jamaica- Consulting Team Member(2008)
- Ornamental Fish Farming proposal for Gates Foundation SEEP Network Urban Value Chain Initiative- Consulting Team Member (2008)
- Concept paper *"Towards a National Export Strategy for Jamaica"* commissioned by the Jamaica Exporters' Association (2007)
- *National SME Policy and Strategy for the Republic of Seychelles* (Indian Ocean) for the Commonwealth Secretariat; comprising the drafting of an SME policy and strategy based on consultation with stakeholders (government ministries, parastatals, associations and MSMEs); complemented by training and capacity building initiatives to support the policy and strategy implementation. (2007)
- Preparation of Terms of Reference for an European Union Special Framework Assistance Benchmarking Initiative for the Office for Private Sector Relations of St. Lucia, in consultation with the St. Lucia Manufacturers' Association. (2007)

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Projects to Identify Implications for MSME Businesses of Trade Policy

- Manual on Legal and Administrative Requirements and Quality Guidelines for Exporting Agricultural and Food Products to the MDCs in CARICOM- UWI Consulting Team Key Expert for the CARICOM Development Fund (2011)
- CARIFORUM Prospects in the EU Markets for Entertainment Services for the Office of Trade Negotiations- Key Expert for Conceptualization Inc. of Barbados (2011)
- Preparation of Prospects for the Negotiation of Mutual Recognition Agreements for professional qualifications for Engineers between EU and CARIFORUM States- Key Expert for Ace Consultants of Spain (2010)
- *CRNM Private Sector Surveys* (Regional) of trade associations' responses to negotiations- 2005, 2006 and 2008 for the Caribbean Regional Negotiating Machinery (now the Office for Trade Negotiations)
- *TRADEWINS* series (critical implications of trade policy for business) draft document focused on Creative and Cultural Industries for Caribbean Export Development Agency (2007)
- PROINVEST/ CARICOM / Barbados Coalition of Service Industries Fund Raising Expert for formation of National Coalitions of Service Industries in selected countries: Belize, the Bahamas, Jamaica, Suriname (2006)

Projects to Build Capacity to Increase Exports

- *Packaging, Labelling and Raw Material Selection for MSMEs* workshop in Montserrat for the Caribbean Technological Consultancy Services Network of the Caribbean Development Bank (CDB) (2010)
- *Guidelines for Technical Regulations and Standards in the European Union Market for Artisanal Products*, preparation of a manual for MSMEs published by Caribbean Export Development Agency/Onsite Caribbean 2 Project(2009)
- Providing support for SME businesses through the provision of (virtual) information on trade and export opportunities for the Grenada Business Gateway Project- International Expert through Landell Mills Limited, United Kingdom (2008)
- Preparation of Elements of a Response Paper for the Development of a National Export Strategy for Jamaica, on behalf of Jamaica Trade and Invest, the Private Sector Development Programme and the International Trade Centre, Geneva (2008)
- Multilateral support Funding Proposal for a Regional Copyright Distribution Study for Caribbean Copyright Link (2008)
- Caribbean Export Development Agency Buyer Mobilization Research (Jamaica) for the Caribbean Gift and Craft Show (2008)
- "*Creating New Products and Market Opportunities in Handcrafted Products*" Caribbean Gift and Craft Show Preparatory Seminars for the CTCS Network of the Caribbean Development Bank-Co-facilitation with Canadian Design Expert (2008)
- "*Export Marketing: How to Win New Customers, Prepare to Export and Promote your business successfully*" for the Centre for Enterprise Development, St. Vincent (2008)
- *"Creating New Market Opportunities for Small Business and Artisanal Enterprises*" for the Private Sector Organization of Jamaica, supported by the EU Private Sector Development Programme (PSDP) (2008)
- First Caribbean International Bank funded *Export Marketing* workshops to develop export competitiveness of small entrepreneurs in Antigua, Bahamas, Barbados, Belize, Dominica, St. Kitts, St.Vincent on behalf of Caribbean Export Development Agency (2005)

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Projects involving Preparation of Export Guides and Strategic Action Plans

- Consultant/ Researcher for the CARICOM (Secretariat) Regional Task Force on Cultural Industries Regional Development Strategy and Action Plan: Phase I: Three Research Reports: *International Best Practices in Incentives for Cultural Industries Development, Incentive Policy in Member States for Cultural Industries Development, Educational Policy in Member States for Cultural Industries Development* (2009/10), Phase II: *Draft Regional Development Strategy and Action Plan*, *Special Report on Cultural Industries in Haiti* (2011/12)
- EU/ Government of St. Vincent and the Grenadines Private Sector Development Programme *Business Support and Development Services: Training and Institutional Development* (STABEX 96/97)- development of manuals for training modules: *Starting a Business, Business Planning and Quantitative Techniques, Qualitative Techniques; Training Seminars on Product Development and E-Commerce, Management, Product Development, Market Profiling, Quantitative Techniques, Qualitative Techniques Development and E-Commerce* (2009)
- Preparation of five-year Strategic Plan, based on consultations, for the development of a Jamaican Professional Services Cluster for The Competitiveness Company and Jamaica Trade and Invest (2007)
- Strategic Sector Development Plan for the Regional (CARIFORUM) Creative and Cultural Industries for Caribbean Export Development Agency (2006)
- Strategic Business and Marketing Plans for financing the sustainable, export-oriented, expansion of a bakery micro-enterprise, under the Caribbean Technological Consultancy Services network of the Caribbean Development Bank (2006)
- Strategic Plans for Bahamas Agricultural Producers Association and Bahamas Craft Producers' Association based on workshops on inter-firm cooperation/ cluster development among producer groups for the Caribbean Export Development Agency (2006)
- Co- facilitation of a Strategic Planning Exercise for Small Business Association Board of Directors leading to the articulation of a Strategic Plan (2007-2010) for association development, supported by Caribbean Export Development Agency(2007)
- Workshops related to strategy development and implementation for policy-makers, officials of the Small Enterprise Promotion Agency and stakeholders in Seychelles.(2007)
- *Export Marketing: How to prepare to Export Successfully and Promote Your Company Through Trade Fairs :A Manual for Caribbean Artisanal Enterprises*, to support enterprises in business/strategic planning in the context of regional integration and greater participation required in global markets, published by the Caribbean Export Development Agency (2007) (http://www.carib-export.com/section.php?Sec=3&SSec=0 &Info=90
- Development of an organizational *Private Sector Strategy* for the Caribbean Regional Negotiating Machinery(2005)

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Projects for Institutional Strengthening and Capacity Building

- Commonwealth Secretariat Regional Consultant to the Global Natural Fibres Forum (Caribbean) (2011/2)
- UN FAO National Consultant (Rural Institutional Capacity Building)-*Strengthening Jamaica's Food Security Programme* (GCP/JAM/018/EC) (2011)
- *Strategic Capacity Building Plan for New Caribbean Design Inc.*, a newly formed regional association involved in product and market development among indigenous producer communities (2010)
- EU/ Government of St. Vincent and the Grenadines Private Sector Development Programme *Business Support and Development Services: Training and Institutional Development* (STABEX 96/97); training of service providers through modules and seminars(2009)
- Habitat for Humanity International (Miami/ Costa Rica) *Survey of Social Housing Initiatives in Jamaica* linked to project preparation (2008)

Private Sector Liaison September 2004- March 2005

Caribbean Regional Negotiating Machinery (CRNM), Barbados

The CRNM develops coordinates and executes an overall negotiating strategy for CARICOM external trade negotiations and advises Member State governments on approaches to WTO, FTAA, EPA and several bilateral negotiations. The Private Sector Liaison has responsibility for private sector business development; collaborating with national /regional organizations and companies to identify critical needs and develop capacity-building initiatives consistent with the organization's mandate.

- *'Expanding Private Sector Outreach'*: a strategy document for strengthening input to trade negotiations
- Planned and implemented several private sector activities with internal technical teams and external consultants, including on *'The Impact of Trade and Technology on Caribbean Creative Industries'* consultation (10/04), 'Bilateral Negotiations, in particular CARICOM/ Canada' consultation (03/05), Trade Policy Workshop for Surinamese Manufacturers (10/04), Rules of Origin workshop for Trinidad Manufacturers (03/05)
- Development of trade brief/ newsletter for private sector decision makers on developments in negotiations, database of target regional firms for electronic dissemination and donor proposal for development of a trade-related Virtual Information Network

Regional Manager – Business Linkages Challenge Fund August 2001 – July 2004

Caribbean Export Development Agency, Barbados/ Deloitte EME, UK

The BLCF is a global UK£16 million cost-sharing grant scheme funded by the Department for International Development (DFID) intended to catalyze new investment and affect poverty alleviation through joint venture formation. . Funds under the scheme were accessed through competitive bidding by private sector and civil society organizations registered in 19 eligible countries in Southern Africa and the Caribbean.

- Team supervision of commitments totalling more than UK£1.8 million in cost sharing grant funds, to regional projects
- Supervised a team of four (4) regionally based Country Managers and reported to the global Project Manager within Deloitte EME, London.
- Sub-regional project management and administration of the Fund: the Dominican Republic, Guyana, Haiti and The Windward Islands

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Senior Export Business Advisor, Marketing & Technical Assistance October 2001 – July 2004
Caribbean Export Development Agency, Barbados

Caribbean Export is a regional, inter-governmental agency, promoting trade, market development and export competitiveness for Caribbean (CARIFORUM) goods and services. I was responsible for managing a client portfolio of growth businesses across the region and administering project funding to enhance their competitiveness and enterprise development and was part of a team responsible for private sector business development and Agency promotion.

- Implemented several firm-level technical assistance initiatives to increase export revenues, including benchmarking of SMEs
- spearheaded proposal for improvements to fund administration, approved by the Board of Directors;
- lead responsibility for implementation of a computerized management information system to streamline grant and client activity
- member of planning committees for the Caribbean Gift and Craft Show 2001-2004 with special responsibility for coordination of the regional apparel and fashion sector
- liaison with a range of stakeholders including government, associations and business support organizations

Export Business Advisor, Technical Assistance Unit November 1999 – October 2001
Caribbean Export Development Agency, Barbados

Export Business Advisors provided business and export planning support for client companies and their business support organizations (BSOs) in a range of sectors of economic activity

- Delivered trade- related business advisory services to a client portfolio in Barbados, Jamaica and Trinidad
- Negotiated and disbursed US$3.6 million in cost-sharing grant funds over 3 years, to more than 300 enterprises for business upgrading, increasing market access and enhancement of competitiveness
- Part of a team responsible for private sector business development and promotion for the Agency
- Liaison with a range of stakeholders including government, associations and business support organizations

Product Development Expert (Independent Consultant) May 1999
Inter- American Development Bank (IDB) /Deeds Industries Ltd, Jamaica

Consultancy to develop business and strategic product development plans for a craft/furniture workshop employing differently abled persons

Consultant/ Small Business Development Specialist November 1995 - August 1996
Horizon Consulting Ltd., Jamaica

Developed commercially feasible and sustainable funding proposals for clients of Horizon Merchant Bank; one of Jamaica's major merchant banks

- Pre- feasibility market research on Dunn & Bradstreet model credit rating service for US-based clients seeking to establish a similar service in Jamaica.
- Developed costing proposal for agricultural pre-clearance facility for exporters for the Jamaica Exporters' Association (JEA).
- Prepared Institutional Strengthening Proposal for donor support of Small Business Association of Jamaica (SBAJ)

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Resident Engineer/ National Expert February 1993 – January 1994

"Strengthening the Competitiveness of the Jamaican Manufacturing Sector"

United Nations Development Programme (UNDP/UNIDO), Jamaica

Coordinating Officer/ National Expert April 1994- March 1995

"Developing and Maintaining the Repair and Maintenance Capability of the Capital Goods Sector (Jamaica)"

United Nations Industrial Development Organization (UNIDO), Jamaica

UN funded Project coordination through the JAMPRO Productivity Centre

- Building of Technical Services Centres for industry: Apparel, Food Processing, Capital Goods,
- Computer Aided Design;
- Capacity building among industry to create linkages to improve competitiveness

Independent Consultant, Jamaica December 1992 - March 1993

Developed and delivered training and engineering projects for clients in the plastics, food processing, cottage industries and financial services sectors

Associate Engineer, Textiles and Sewn Products, JAMPRO April 1991 - December 1992

Industrial Engineer, Stylecraft (Garment) Manufacturing Ltd. September 1990- April 1991

Sector-specific project development and implementation for private sector clients in Apparel and Sewn Products manufacturing in the areas of garment engineering, quality control, cost accounting, industrial training, productivity improvement

EDUCATION AND PROFESSIONAL STUDIES

Certificate of Completion: Online Advanced International Certificate Course using IP Panorama e-learning content (2011), World Intellectual Property Organization (WIPO), Korean Intellectual Property Office (KIPO), Korea Advanced Institute of Science and Technology (KAIST) and Korean Invention Promotion Association (KIPA)

Executive Masters in Business Administration (2009),University College of the Caribbean/ Commonwealth of Learning (COL)

Certificate in Project Management Principles and Practices(2002),University of New Orleans Executive Education (Jamaica)

MA and Postgraduate Diploma in Industrial Design (1998), Birmingham Institute of Art & Design, England

Postgraduate Diploma in Executive Management (Distinction)(1995), *Specialization- Training of Women Entrepreneurs*. Maastricht School of Management, The Netherlands

Bachelor of Science in Industrial Engineering (Honours)(1990),University of the West Indies, Trinidad

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APPENDIX D INITIAL REPORT OUTLINE

PART 1 INTRODUCTION AND BACKGROUND: DOING BUSINESS IN THE EU PRIORITY MARKETS

DOING BUSINESS IN FRANCE

- Size of market
- Disposable income
- About the Business Environment
- Culture, Customs and Business Practices
- major trade agreements
- Legal and Regulatory Framework
    - i. Land, Labour, Capital
    - ii. Intellectual Property
    - iii. Standards and Certification (mandatory vs. voluntary)
    - iv. legal framework for distribution
- Important agencies and organizations

DOING BUSINESS IN GERMANY

- Size of market
- Disposable income
- About the Business Environment
- Culture, Customs and Business Practices
- major trade agreements
- Legal and Regulatory Framework
    - i. Land, Labour, Capital
    - ii. Intellectual Property
    - iii. Standards and Certification (mandatory vs. voluntary)
    - iv. legal framework for distribution
- Important agencies and organizations

DOING BUSINESS IN THE NETHERLANDS

- Size of market
- Disposable income
- About the Business Environment
- Culture, Customs and Business Practices
- major trade agreements
- Legal and Regulatory Framework
    - i. Land, Labour, Capital
    - ii. Intellectual Property
    - iii. Quality Standards and Certification (mandatory vs. voluntary)
    - iv. legal framework for distribution

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- Important agencies and organizations

PART 2 MARKET DEMAND STUDIES (one study for each priority sector: fresh food, beverages, specialty foods, arts and crafts, marketing and distribution of tourism services)

Characteristics of Market/ Consumer Demand in target markets

Demographics of Consumer Demand

Major market segments

Leading products and suppliers

How consumers buy: critical trends and opportunities

Main Marketing channels (i.e. wholesalers, independent retailers, importers, licensing, e-commerce, department stores)

Supply Chain Issues

Production Requirements

Logistics

PART 3 SECTOR STUDIES (one study for each priority sector: fresh food, beverages, specialty foods, arts and crafts, marketing and distribution of tourism services)

Sector Overview/ Definitions- based around the value chain

Major product/ service categories

Market requirements

- Product quality standards and Certification (mandatory vs. voluntary)
- Environmental regulations
- Consumer health and safety (traceability –RAPEX and RASFF)
- Technical barriers to trade
- Sanitary and phytosanitary measures
- Packaging and labeling requirements
- Tariffs, duties and quotas

Competition and Key Players

PART 4 EXPORT GUIDES AND ACTION PLANS (one action plan for each priority sector: fresh food, beverages, specialty foods, arts and crafts, marketing and distribution of tourism services)

Sector Situational Analysis (Barbados)

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Summary of main EPA opportunities

SWOT Analysis

Potential Comparative and Competitive Advantage

Competitive Positioning of Barbados Sector and Main Strategy (pre-feasibility considerations)

- Strategy choice: cost, differentiation, focus
- Marketing mix (4Ps)
- Market entry strategies
- Critical success factors

Action Plan

PART 5 FUTURE ASSISTANCE FRAMEWORK

Summary of common needs identified across sectors to assist market entry

The role of the BPSA

Priority areas for assistance

Assistance objectives and purpose

Log frame matrix

- Project Purpose
- Expected Results and Objectively Verifiable Indicators
- Activities

Resources Needed

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APPENDIX E PARTIAL BIBLIOGRAPHY

ARTS AND CRAFTS

Barbados Investment and Development Corporation Profile of the Craft Sector (December 2008)

Barbados Investment and Development Corporation Craft Sector Information Brief for 2010

CBI Market Study: Domestic Furniture http://www.cbi.eu/marketinfo/cbi/?action=findDocuments&product=19&language=english&market=0

CBI Market Study: Gifts and Decorative Articles

CBI Market Study: Home Decoration http://www.cbi.eu/87/sector22/Home_decoration

CBI Market Study: Household Utensils http://www.cbi.eu/marketinfo/cbi/?action=findDocuments&product=25&language=english&market=0

Caribbean Creatives, Issue 1, Volume 2, January to March 2011

Creative Economy: A Feasible Development Option, UNDP (2010)

Cultural Industries in CARICOM: Trade and Development Challenges, Keith Nurse, November 2006

European Commission Guide to Crafts and Microenterprises in the Netherlands http://www.european-microfinance.org/data/file/Guide_Crafts_and_Micro-entreprises_in_Netherlands.pdf

Export Orientation and the Cultural Industries: The Case of Barbados, presented by Ian Walcott at the SALISES Conference, Trinidad, 2007

The Creative Sector in CARICOM: The Economic and Trade Policy Dimensions, prepared by Keith Nurse, CARICOM Secretariat Regional Symposium on Services, Antigua and Barbuda, July 2009

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From Cultural to Creative Industries: Theory, Industry and Policy Implications, Stuart Cunningham, Director of the Creative Industries Research and Applications Centre, Queensland University of Technology

Policy Paper to Inform the Propelling of Barbados' Creative Economy: A Cultural Industries Development Strategy, Prepared by the National Task Force on Cultural Industries

BEVERAGES

Barbados Investment and Development Corporation Profile of the Food and Beverage Sector, January – December 2007

Barbados Investment and Development Corporation Profile of the Beverages Subsector, January – December 2008

Barbados Investment and Development Corporation Profile of the Beverages Subsector, January – December 2009

Wine http://www.cbi.eu/87/sector49/Wine

EU MARKETS

France

Doing Business in France, Invest in France Agency, 2012 Edition

Doing Business with Martinique, Caribbean Export Development Agency, May 2007

Doing Business with Guadeloupe, Caribbean Export Development Agency, May 2007

Market Research Report: Guadeloupe, BIDC, 2010

Market Research Report: Martinique, Prospects for Barbadian Exports, BIDC, 2010

Netherlands

Doing Business in the Netherlands, PKF, 2010 Edition

Doing Business with Curacao, Caribbean Export Development Agency, May 2007

Germany

Doing Business in Germany, PKF, 2010 Edition

confidential draft

EXPORT GUIDES AND ACTION PLANS

Antonissen T., Harmsen M. & Janssen F.(2010), CBI Manual Exporting to Europe, an Introduction, E&M ExportManagement BV

Barbados Private Sector Trade Team (2009) Draft Profile: The Manufacturing Sector in Barbados

de Boer K., & van Duijvenbode A., (2009), Export Manual 2009, Export Marketing Planner: A Manual on How to Enter European Markets, CBI

How competitive forces shape strategy. Preview By: Porter, Michael E.. *McKinsey Quarterly*, Spring80 Issue 2, p34-50, 17p; (*AN 6990575*)

Pounder P. and K. Blawatt (2011), Internationalization of SMEs: Creating Graduation Models for the Growth and Development of Small Businesses, Barbados Small Business Association - restricted circulation

THE FIVE COMPETITIVE FORCES THAT SHAPE STRATEGY. Preview By: Porter, Michael E.. *Harvard Business Review*, Jan2008, Vol. 86 Issue 1, p78-93, 16p, 1 diagram, 1 illustration, 1 graph, 1 map, 1 color; (*AN 28000138*)

World Economic Forum (2012), The Global Enabling Trade Report: Reducing Supply Chain Barriers

FRESH FOOD

Barbados Investment and Development Corporation Profile of the Food Subsector, January – December 2008

Barbados Investment and Development Corporation Profile of the Food Subsector, January – December 2009

Canadian Ministry of Agriculture Food and Rural Affairs http://www.omafra.gov.on.ca/english/crops/organic/certification.htm

Commonwealth Secretariat (2001), Guidelines for Exporters of Fruit and Vegetables to the European Markets (out of print)

confidential draft

http://books.google.com.jm/books?id=6VCYu0B6aHMC&pg=PA13&lpg=PA13&dq=Guidelines+for+Exporters+of+Fruit+and+Vegetables+to+the+European+Markets&source=bl&ots=wtcECQEiHJ&sig=2xupmPNQUc49eKnT8lqZrl4ELjc&hl=en&sa=X&ei=JYbNT92lJIOY8gSy9_R3&ved=0CEwQ6AEwAQ#v=onepage&q=Guidelines%20for%20Exporters%20of%20Fruit%20and%20Vegetables%20to%20the%20European%20Markets&f=false

Food Ingredients http://www.cbi.eu/87/sector9/Food_ingredients

Fresh Fruit and Vegetables http://www.cbi.eu/87/sector6/Fresh_Fruit_and_Vegetables

Guaranteed Organic Certification Agency http://www.goca.ws/

Organic Farmers and Growers http://www.organicfarmers.org.uk/

Quality Assurance International http://www.qai-inc.com/

UK Department for Food Environment and Rural Affairs (DEFRA)
http://www.defra.gov.uk/FARM/organic/standards/index.htm

GENERAL

Agriculture and Agri-Food Canada

The CARIFORUM-EU EPA: A Tool for Stimulating Innovation in Barbados, Ministry of Foreign Affairs and Foreign Trade, December 2010

Centre for Promotion of Imports from developing countries/ country profiles page
http://www.cbi.eu/marketinfo/cbi/?

Defra UK, www.defra.gov.uk (Food Standards Agency)

Deloitte Food and Beverage 2012

EU Helpdesk for Developing Countries http://exporthelp.europa.eu/thdapp/index_en.html

EU legislation http://eur-lex.europa.eu

EU Packaging Directivehttp://www.epa.gov/osw/internat/fact-sht/package.pdf

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EUROMONITOR 2011

European Environmental Regulations
http://ec.europa.eu/youreurope/nav/en/business/development/industry-trade/environmental-regulations-policy/index_en.html

European Food Safety Authority

French Ministry of Food, Agriculture and Fisheries
http://www.berr.gov.uk/sectors/sustainability/packaging/Packaging%20in%20the%20EU/page38919.html
http://www.epa.gov/oswer/international/factsheets/200610-packaging-directives.htm

International Trade Centre www.intracen.org

International Trade Centre Market Access Maps http://www.macmap.org/

Major Provisions on Trade in Goods under the EPA, May 2011

Market News Information Service http://www.intracen.org/mns/

National laws for EU States http://eur-lex.europa.eu/n-lex

New Zealand Trade and Enterprise

OECD

Product Maps http://www.p-maps.org/Client/index.aspx

Trade Facilitation Office of Canada- Country Commercial Guides

Trade Maps http://www.intracen.org/mat/Trademap.aspx

UK Institute of Packaging

United States government exporting to the European Union page
http://www.buyusa.gov/europeanunion/

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US Department of State

USDA Gain Reports

WTO (n.d.). SPS Information Management System database. Retrieved from http://spsims.wto.org/

WTO (n.d.). TBT Information Management System database. Retrieved from http://tbtims.wto.org/

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