

PART VI TOURISM MASTER PLAN IMPLEMENTATION

36. ORGANISING FOR GROWTH

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36.1 TMP TEAM

The development of Dominica's tourism sector will not simply happen. It has to be stimulated, directed and the activities of the various tourism and tourism related organisation coordinated.

Three elements are necessary – a champion, a steering group and a project management unit.

Champion

To get 'buy in' by all stakeholders, the TMP need to be 'championed'. The TMP vision, the strategy and the benefits from development needs to be regularly articulated, elaborated and its implementation encouraged by a senior figure in authority – the Minister for Tourism.

Steering Group

TMP implementation will require the involvement of a number of Ministries, state organisation, communities, NGOs and the private sector. To facilitate collaboration between the different state agencies and strengthen public-private partnership, we recommend that setting up of a steering group – a Tourism Task Force. This task force would also have an advisory role in regard to the TMP implementation. The Task Force would be composed of the senior officers from the Ministries and organisations directly involved in tourism, as well as representatives from the private sector and communities. It would be chaired by the Minister of Tourism. The members should be kept relatively small to facilitate an action oriented focus.

Project Management Unit

Recognising that the members of the Tourism Task Force will be senior officers/representatives having other responsibilities, we recommend the setting up of TMP project management unit within the Ministry of Tourism with the responsibility to initiate, guide and coordinate TMP implementation.

The role/functions of the TMP PMU would be:

- preparation of detailed work plans, budgets and responsibilities for implementation of the action plan
- advising private sector groups and communities on project implementation
- advising the Dominica Tourist Board on formulation of destinations promotion strategy and implementation
- preparation of policy/research papers on various tourism issues
 - air access, new airport, etc
- liaising with relevant Government Ministries and agencies involved in action plan implementation

- coordination and administration of all technical inputs and work elements under the project
- resource coordination with donor agencies re support for specific project components
- provide a secretariat role to the Tourism Task Force

36.2 TOURISM MASTER PLAN IMPLEMENTATION

36.2.1 Scheduling the TMP Programme of Actions

An issue of concern to tourism planners is how to sequence the recommended action programmes. Should the tourism product be expanded and standards improved prior to, or after, the establishment of a marketing campaign? Should capacity building and human resource development precede product development and marketing? The greatest consensus appears to be to do all at once. This is not as simplistic as it appears at first sight. Because all the action programmes are so interlinked, trying to identify the best sequence is not a realistic approach. No single measure can bring much benefit without at least some progress in respect of the other actions. In this sense, it is more instructive to view the development of the tourism sector as a process rather than as a sequence of activities.

We see the implementation of the TMP action programmes in three distinct but related phases as shown on Table 36.1.

Phase I: Short Term 2006 - 2007

During this period, - ***the organising for growth phase*** - the primary focus will be on:

- putting the arrangements for TMP implementation in place
 - GOCD approval
 - set up Tourism Task Force
 - establish a TMP PMU within Ministry
- institutional re-organisation
 - set up the Dominica Tourist Board, Environmental Protection Agency, National Parks Service Agency, etc
 - streamline the Tourism Division within the Ministry
- revise legal framework
- investment in nature product expansion
 - Waitukubuli Trail
 - Emerald Pool & Trafalgar Falls capacity expansion
- partnership campaign between Dominica hotels and dive shops, NDC/DTB, Ministry and airlines to increase demand for nature and dive product with expansion of airlift

Phase II: Medium Term 2008 – 2010

During this period – *the growth ‘take-off’ phase* – the primary focus will be on:

- product diversification and expansion
 - golf resort, biopark, health/wellness resort etc
- rehabilitation of cruise product
 - upgrade/new jetty at Woodbridge
 - cruise village
- increased destination & product promotion
- improved physical planning and other sector management
- upgrading service skills and standards
- upgrading economic infrastructure

Phase II: Longer Term 2008 – 2010

During this period – *the ‘rapid’ growth phase* – the primary focus will be on:

- continued product development and expansion
- more intensive destination and product marketing
- further development of infrastructure
 - new international airport

Table 36.1. TMP IMPLEMENTATION PLAN

Programme	Actions	Phase I: 2007	Cost EC\$M	Phase II: 2008 - 2010	Costs EC\$M	Phase III: 2011 - 2015	Costs EC\$M	Agencies Responsible
A. Arrangements for TMP Implementation	<ul style="list-style-type: none"> ➤ GOCD approval of TMP ➤ publication of plan ➤ consensus & support of stakeholders ➤ set-up Tourism Task Force ➤ TMP Project Mgt. Unit ➤ feasibility studies 		1.0 4.0	<ul style="list-style-type: none"> ➤ championing of TMP - awareness campaign ➤ coordination of actions by ministries, agencies etc ➤ coordination of resources for implementation ➤ feasibility studies 	4.0 10.0	<ul style="list-style-type: none"> ➤ championing of TMP - awareness campaign ➤ coordination of actions by ministries, agencies etc ➤ coordination of resources for implementation ➤ feasibility studies 	7.0 4.0	MTI & PSR
TOTAL A			5.0		14.0		11.0	
B. Institutional Arrangements	<ul style="list-style-type: none"> ➤ reorganisation & strengthening within Ministry ➤ Dominica Tourist Board ➤ Environmental Protection Agency ➤ Air & Sea Ports Authority ➤ Investment Promotions Agency ➤ National Parks Service Agency 			<ul style="list-style-type: none"> ➤ training 	*			GOCD Cabinet
TOTAL B			n/a		n/a		n/a	
C. Review Legal Framework	<ul style="list-style-type: none"> ➤ laws and regulations to establish new bodies, setting out their respective powers and operations 			<ul style="list-style-type: none"> ➤ amendment to National Parks Act to permit operation of an hotel in Cabrits National Park 				GOCD Cabinet
TOTAL C			n/a		n/a		n/a	
D. Customer Knowledge & Know How	<ul style="list-style-type: none"> ➤ market survey to determine characteristics of nature and dive tourism 		*	<ul style="list-style-type: none"> ➤ implement CTO MIST ➤ visitor exit surveys ➤ cruise survey ➤ tour operator survey ➤ statistical data base 		<ul style="list-style-type: none"> ➤ implement CTO MIST ➤ visitor exit surveys ➤ cruise survey ➤ tour operator survey ➤ statistical data base 		NDC/DTB Watersports Association; Hotel & Tourism Association CSO
TOTAL D					0.5		0.5	

Programme	Phase I: 2007	Cost EC\$M	Phase II: 2008 - 2010	Costs EC\$M	Phase III: 2011 - 2015	Costs EC\$M	Agencies Responsible
E. Destination and Product Promotion	<ul style="list-style-type: none"> ➤ specific promotional campaign with carriers to nature and dive segments in selected markets ➤ niche product market plan 		<ul style="list-style-type: none"> ➤ promotional activities ➤ range of collaterals ➤ e-marketing/distribution ➤ e-commerce ➤ packaging 		<ul style="list-style-type: none"> ➤ promotional activities ➤ range of collaterals ➤ e-marketing/distribution ➤ e-commerce ➤ packaging 		NDC/DTB Watersports Assoc. Hotel & Tour Assoc. Carriers
TOTAL E		3.0		30.0		50.0	
F. Improve Air and Sea Access	<ul style="list-style-type: none"> ➤ joint campaign with airlines from hubs ➤ support for airlines to increase capacity on selected routes ➤ preliminary feasibility study of redeveloping Marigot fishery harbour ➤ Melvill Hall upgrade 	0.5 1.6 0.4 14.0	<ul style="list-style-type: none"> ➤ negotiation with airlines ➤ joint campaign with airlines from hubs ➤ support for airlines to increase capacity on selected routes ➤ sea access promotion ➤ Canefield upgarde 	n/a 0.5 1.6 0.4 5.0	<ul style="list-style-type: none"> ➤ negotiation with airlines ➤ joint campaign with airlines from hubs ➤ support for airlines to increase capacity on selected routes ➤ sea access promotion ➤ new int'l airport 	n/a 0.5 1.6 0.4 400.0	DPA NDC/DTB Watersports Association Hotel & Tour Association CSO M Agri & Fish
TOTAL F		16.5		7.5		402.5	
G. Attract Tourism Investment	<ul style="list-style-type: none"> ➤ project identification and project outlines ➤ data base of potential investment partners ➤ establish 'one-stop-shop' for investors ➤ promotional campaign 		<ul style="list-style-type: none"> ➤ update project identification and project outlines ➤ update data base of potential investment partners ➤ promotional campaign 		<ul style="list-style-type: none"> ➤ update project identification and project outlines ➤ update data base of potential investment partners ➤ promotional campaign 		IPA Ministry of Finance
TOTAL G		3.0		9.0		15.0	
H. Upgrade, Diversity & Expand Product	<ul style="list-style-type: none"> ➤ viability assessment for selected properties ➤ re-financing package ➤ re-habilitation fund for properties ➤ Trafalgar Falls & Emerald Pool capacity expansion ➤ Waitukubuli Trail develop 	0.5 40.0 0.5 14.0	<ul style="list-style-type: none"> ➤ Roseau Waterfront ➤ Roseau Historic Centre ➤ Marine Visitor Centre ➤ botanic gardens/park ➤ biopark ➤ cruise village ➤ Woodford Hill Resort ➤ health/wellness resort ➤ residential tourism ➤ community projects ➤ Cabrits boutique hotel ➤ on-going site improvements 	75.0 40.0 5.0 5.0 15.0 24.0 300.0 40.0 40.0 1.0 65.0 1.0	<ul style="list-style-type: none"> ➤ Roseau River Corridor ➤ Hampstead Resort ➤ yacht marina & hotel ➤ Portsmouth ➤ Portsmouth waterfront appts ➤ golf/resort Portsmouth ➤ residential tourism ➤ community projects ➤ Roseau Historic Centre ➤ Roseau waterfront ➤ on-going site improvements 	20.0 450.0 250.0 130.0 150.0 80.0 1.0 40.0 75.0 2.0	IPA NDC/DTB Ministry of Tourism Private Sector Banks Communities
TOTAL H		55.0		611.0		1198.0	

Programme	Actions	Phase I: 2007	Cost EC\$M	Phase II: 2008 - 2010	Costs EC\$M	Phase III: 2011 - 2015	Costs EC\$M	Agencies Responsible
I. Upgrade Service Skills and Standards	<ul style="list-style-type: none"> ➤ establish systems for formal certified training - accredited curriculum ➤ hospitality training centre at Dominica State College equipped and operational ➤ train-the-trainer courses 			<ul style="list-style-type: none"> ➤ train-the-trainer ➤ training programme for new entrants & existing employees 		<ul style="list-style-type: none"> ➤ train-the-trainer ➤ training programme for new entrants & existing employees 		NBD/DTB Dominica State College
TOTAL I			4.0		4.0		4.0	
J. Rehabilitate Cruise and Other Infrastructure	<ul style="list-style-type: none"> ➤ feasibility studies ➤ Roseau Cruise Berth ➤ West Coast Road 		1.0 1.5 50.0	<ul style="list-style-type: none"> ➤ Woodbridge Bay cruise berth ➤ Melville Hall/Roseau road ➤ Roseau Valley road ➤ East Coast connection road ➤ water supplies for cruise ship ➤ power supplies ➤ water supply & sewage treat ➤ adapt Marigot Fishery Harbour for fishing 	50.0 to 100.0 45.0 20.0 30.0 4.5 22.0 30.0 30.0	<ul style="list-style-type: none"> ➤ upgrade Cabrits cruise jetty ➤ sanitary landfill in North ➤ water supply and sewage treatment up grade 	7.0 n/a 30.0	DPA Ministry of Works DOWASCO DOMLEC
TOTAL J			52.5		231.5 to 281.5		37.0	
K. Improve Physical Planning and Other Sector Management	<ul style="list-style-type: none"> ➤ resource coordination 		n/a	<ul style="list-style-type: none"> ➤ land-use policy & physical master plan ➤ resource coordination ➤ environmental awareness 	0.5 *	<ul style="list-style-type: none"> ➤ resource coordination ➤ environmental awareness 	*	Min. House & Lands MOT Min. Agr. F & Envir
TOTAL K			n/a		0.5		n/a	
L. Strengthen Community Involvement and Sector Linkages	<ul style="list-style-type: none"> ➤ promotion of community projects 			<ul style="list-style-type: none"> ➤ promotion of community projects ➤ identify possibilities to supply tourism inputs ➤ identify way of expanding indigenous products ➤ organisation of tourism B2B fairs 		<ul style="list-style-type: none"> ➤ promotion of community projects ➤ organisation of tourism B2B fairs 		Min. Carib. Affairs MTI & PSR IPA
TOTAL L			n/a		n/a		n/a	

* less than EC\$100,000

36.3 TMP COSTS AND FINANCING

The estimated costs of implementing the TMP is about EC\$2.8B, just over US\$1.0B in terms of constant 2005 prices.

The breakdown of this cost is shown in the following table.

Table 36.2. TMP Public and Private Sector Investment – EC\$M

Programme/Period	Phase I	Phase II	Phase III
A. Arrangements for TMP Implementation	5.0	14.0	11.0
B. Institutional Reorganisation	n/a	n/a	n/a
C. Revise Legal Framework	n/a	n/a	n/a
D. Customer Knowledge and Know How	*	0.5	0.5
E. Destination & Product Promotion	3.0	30.0	50.0
F. Improve Air & Sea Access	16.5	7.5	402.5
G. Attract Tourism Investment	3.0	9.0	15.0
H. Upgrade, Diversity, Expand Product	55.0	611.0	1,198.0
I. Upgrade Service Skills & Standards	4.0	4.0	4.0
J. Rehabilitate Cruise & Other Infrastructure	52.5	231.5 to 281.5	37.0
K. Improve Physical Planning & Sector Mgt	n/a	0.5	n/a
L. Strengthen Community & Other Linkages	n/a	n/a	n/a

It must be emphasised that these costs are indicative of the magnitudes involved, not precise figures based on detailed calculations.

An indicative cost breakdown between public, private and public/private partnership arrangements is shown on Table 36.3 following

Table 36.3. TMP Costs by Sector

Sector \ Phase	EC\$M			
	Phase I	Phase II	Phase III	Total
Public Sector	139.0	304.0 – 354.0	520.0	963.0 – 1103.0
Private Sector	-	445.0	833.0	1,278.0
Public/Private	-	159.0	365.0	524.0
Total EC\$M	139.0	908.0 – 958.0	1,718.0	2,765.0 – 2,815.0

Public sector investment is estimated at between EC\$963 – 1,103. However, it should be noted that EC\$400M of this represents the cost of a new international airport.

Private sector investment is estimated about EC\$1,278M with Public Private Partnership investment amounting in a further EC\$524M.

Sources of Funding

Source funding will come from

- bilateral aid programmes – UK, Peoples Republic of China, France, USAID, etc
- multi-lateral aid programme, European Union, OAS, etc
- Development Banks – Caribbean Development Bank, Investment Finance Corporation
- Private Foreign Investment
- Private local (Dominica) Investment
- Public funds (Dominica)

36.4 MONITORING TMP IMPLEMENTATION

To monitor TMP implementation we recommend the use of a log-frame matrix which relates inputs, outputs and impacts. The advantage of the log-frame matrix is that it can incorporate quantitative and qualitative information to give an overall assessment.

The following log-frame matrix should be regarded more indicative than definitive. Its construction can be made more or less comprehensive, depending on the information required and available.

Table 36.4. TMP Log-Frame Monitoring Matrix

Programme Structure	Verifiable Indicators	Sources
A. Socio-Economic Impacts (i) contribution to GDP (ii) foreign exchange earnings (iv) tax revenues to Govt (v) capital investment (vi) benefits to communities	<ul style="list-style-type: none"> • national accounts data • visitor exit surveys • investment data • numbers employed on projects • visitor expenditures 	CSO NDC/DTB NCD/IPA } statistics collected By Communities
B. Socio-Economic Outputs (i) tourism expenditures (ii) visitor numbers (iii) tourism employment (iv) skills upgrade (v) airlift (vi) sealift (vii) cruise ship calls (viii) no. of hotels rooms (ix) other (x).....	<ul style="list-style-type: none"> • visitor exit surveys • visitor exit surveys • employment surveys • number trained • airlines • ferry companies • port statistics • accommodation inventory 	CSO/NDC/DTB CSO/NDC/DTB Dom. State College Dom. State College Airlines/CSO Sea Carriers/CSO DPA NDC/DTB

Programme Structure	Verifiable Indicators	Sources
C. Socio-Economic Inputs (i) Public sector investment (ii) Private sector investment (iii) Other	<ul style="list-style-type: none">• national accounts data• investment data	CSO, Min. of Finance NDC/IPA