



MONTSERRAT

Blue Economy Scoping Study

Enhancing the Blue Economy in the Emerald Isle

Barbados and the Eastern Caribbean

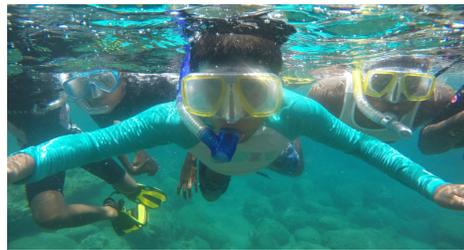
ACKNOWLEDGEMENTS

This report forms part of the efforts of the United Nations Development Programme (UNDP) in Barbados and the Eastern Caribbean to support the sustainable development of the blue economy in the region and contribute to the blue economy for green islands approach. To this end, UNDP supported the Government of Montserrat to produce this Blue Economy Scoping Study. Appreciation is extended to Hon. Premier J.E. Farrell and Minister Crenston Buffonge for their support and willingness to participate in stakeholder engagement activities. Special thanks to the national focal points, Melissa O' Garro (Director of Agriculture) and Thiffanie Williams (Environment Officer) from the Ministry of Agriculture, Housing, Lands and the Environment and Mr. Alwyn Ponteem (Chief Fisheries and Ocean Governance Officer) from the Ministry of Agriculture, Housing, Lands and the Environment for their support in the implementation of the project.

Acknowledgements are offered to the consultants on this project, S-A. Cox, C. Adjodha, C. Drakes; L. K. Soares and V. Wade and gratitude is extended to Dr. Julian Roberts and Ms. Nikola Simpson for their inputs. Sincere thanks to the informants, focus group attendees, survey respondents and to the technical support team of Blue Zone and MALHE Vibes as well as to personnel involved in the communication and outreach activities of this project.



Photo credit: Montserrat Tourism Division, D.S. Media and Designs, Veta Wade, and Alwyn Ponteem.



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ACRONYMS AND ABBREVIATIONS

ACS	Association of Caribbean States
BE	Blue Economy
BHM	Blue Halo Montserrat
CARICOM	Caribbean Community and Common Market
CANARI	Caribbean Natural Resources Institute
CARILEC	Caribbean Electric Utility Services Corporation
CAST	Caribbean Alliance for Sustainable Tourism
CCA	Climate Change Adaptation
CCCCC	Caribbean Community Climate Change Centre
CCREEE	Caribbean Center for Renewable Energy and Energy Efficiency
CDB	Caribbean Development Bank
CDEMA	Caribbean Disaster Emergency Management Agency
CEFAS	Centre for Environment, Fisheries and Aquaculture Science
CEMA	Conservation and Environment Management Act
CERMES	Centre for Resource Management and Environmental Studies
CHTA	Caribbean Hotel and Tourism Association
CIPREG	Capital Investment Programme for Resilient Economic Growth
CNFO	Caribbean Network of Fisherfolk Organisations
CREF	Caribbean Renewable Energy Forum
CRFM	Caribbean Regional Fisheries Mechanism
CROP	Caribbean Regional Oceanscape Project
CTO	Caribbean Tourism Organisation
CYEN	Caribbean Youth Environment Network
DITES	Department of Information Technology and e-Government Services
DRM	Disaster Risk Management
EAF	Ecosystem Approach to Fisheries
EBM	Ecosystem Based Management
ECLAC	Economic Commission for Latin America and the Caribbean
ECROP	Eastern Caribbean Regional Ocean Policy
EU	European Union
FAD	Fish Aggregating Device
FAO	Food and Agriculture Organization of the United Nations
FAC	Fisheries Advisory Committee
FCDO	Foreign Commonwealth and Development Office
GoM	Government of Montserrat
GDP	Gross Domestic Product
GEF	Global Environment Facility
GRID	Governance Reform and Institutional Development
ICM	Interim Coordination Mechanism
ICT	Information Communication Technology
IDB	Inter-American Development Bank
ILO	International Labour Organisation
IMO	International Maritime Organisation
IUU	Illegal Unregulated and Unreported Fishing

IVMS	Inshore Vessel Monitoring System
JNCC	Joint Nature Conservation Committee
MALHE	Ministry of Agriculture, Lands, Housing and the Environment
MCWEL	Ministry of Communications, Works, Energy and Labour
MEYAS	Ministry of Education, Youth Affairs and Sports
MFEM	Ministry of Finance and Economic Management
MHSS	Ministry of Health and Social Services
MMO	Marine Management Organisation
MoU	Memorandum of Understanding
NGOs	Non-Governmental Organisations
NIC	National Intersectoral Coordination Mechanism
NOGC	National Ocean Governance Committee
NOGP	National Ocean Governance Policy
OECS	Organisation of Eastern Caribbean States
OSPESCA	Organization for the Fishing and Aquaculture Sector of the Central American Isthmus
OTs	Overseas Territories
SAP	Strategic Action Programme
SCUBA	Self-Contained Underwater Breathing Apparatus
SES	Social Ecological System
SICA	Central American Integration System
SSE	Social and Solidarity Economy
SPAW-RAC	Specially Protected Areas and Wildlife- Regional Activity Centre for the wider Caribbean
TOS	The Oceanic Standard
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
UNEP-CEP	United Nations Environment Programme- Caribbean Environmental Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UWI	University of the West Indies
WECAFC	Western Central Atlantic Fisheries Commission



EXECUTIVE SUMMARY

Montserrat has the unique opportunity to capitalise on the emerging blue economy (BE) as a way to build forward better in light of the COVID-19 pandemic. In an effort to advance the BE agenda, the Government of Montserrat (GoM) expressed their desire to explore BE opportunities. An important first step was the need to undertake a blue economy scoping study to inform the strategic direction for BE development.

The UNDP Multi-Country Office for Barbados and the Eastern Caribbean collaborated with the GoM and a team of consultants (Appendix I) to undertake a rapid preliminary assessment of the status of Montserrat's Blue Economy to help build a snapshot of the island's current blue wealth and productivity. The study aimed to uncover the constraints to developing a more productive blue economy and assess the potential for generating greater value, creating equitable blue growth and promoting climate resilience. The timeline for the assessment was ~2.5 months (mid October - December 2020).

The study was gender responsive and human rights based, to support Montserrat in building an equitable blue economy. It provides guidance on the blue economy opportunities that can be explored, and best fit the local context in Montserrat. Sector-specific opportunities that support the overarching framework of blue economy development are also outlined. Given the nature of this rapid assessment, it is recommended that a second phase is undertaken in the near future to refine the BE vision and provide a detailed action plan that can guide GoM's strategic direction for sustainable development.

The recommendations that follow are based on the preliminary assessment and can be considered as guidance that can be used in tandem with ongoing BE initiatives (Appendix II). Exploring synergies with existing initiatives will be an important next step.

- The Government of Montserrat (GoM) can consider formally identifying an authoritative lead ministry responsible for BE and Ocean Governance. This ministry will be mandated to take on the overall responsibility for the management and coordination of marine-related activities. Implementing an integrated BE will require, and lead to, institutional changes.
- After a ministry is formally identified, the amalgamation of existing inter-sectoral committees and the establishment of an effective cabinet-appointed multi-sectoral coordination mechanism can be prioritised.
- This decision-making organ will be mandated to coordinate the numerous activities and initiatives being undertaken and proposed within Montserrat. Key ministries responsible for labour, poverty reduction, gender equality and education are recommended to be included.
- The continuation of progress on the development of a National Ocean Governance Policy (NOGP), to establish a strategic framework for integrated marine planning and management of the nation's marine space, resource users and the activities that occur within it can be considered.

Reflecting on lessons learnt throughout the process, the following general recommendations are offered:

- Foresight and visioning exercises worked well in engaging stakeholders in formulating an initial vision for the blue economy in Montserrat. However, more in-depth exercises are needed to further define the vision and support formulation of strategies and policies that will promote resilience building.
- The investigation of socio-economic contexts in blue economy assessments has been limited. Ecological processes have been the primary focus of many studies in the past. Yet a clear understanding of social and economic intersections and the corresponding impact on the natural environment, is integral in overcoming barriers that have been hindering blue economy expansion.

- The study proposes that the blue economy be defined as part of a social-ecological system (SES) where socio-economic activity is dependent upon natural resources. Therefore social actors and ecological factors are interdependent, and any development in the blue economy must address this in order to be sustainable and resilient.
- It was also found that conducting a gender responsive and sustainability based socio-economic analysis, can be considered as a key feature of blue economy scoping studies going forward. The analysis highlighted the different social and economic needs of women and men, and took a people centered approach to recommendations for policy and planning. Structural barriers were identified which, if addressed to increase positive development outcomes, including for strengthening local economies and increasing their adaptability to shocks.

Growth and development planning for BE would

- benefit from linking education, labour force development and poverty reduction goals for determining human resource needs and building human resources capacity.

Involving youth groups early in the process of the

- scoping exercise offered new insights and interesting perspectives for blue economy development. Access to wider education and employment opportunities on island for youth is critical to avoid 'brain drain'. The youth in Montserrat are the innovators and aspiring oceanpreneurs that will build and sustain the blue economy.

Engaging a local Ocean Ambassador as a Stakeholder

- Engagement Specialist worked extremely well in ensuring the successful implementation of the project given the short timeline. She was instrumental in coordinating community and outreach activities including radio appearances, a diverse data source, which offered access to the general public who may have some interest in the blue economy but may not be directly involved.

Finally, engaging the creative industry in the

- development of an infographic and artwork that illustrates the Emerald Blue Isle Vision 2035 was a creative way to immortalise the sentiments of stakeholders. The artwork will serve as a constant reminder of their goals and aspirations and encourage stakeholders to work towards achieving this vision.

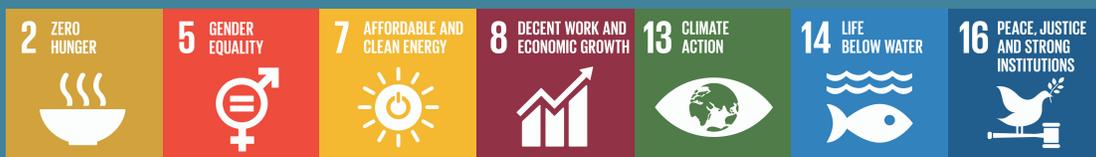


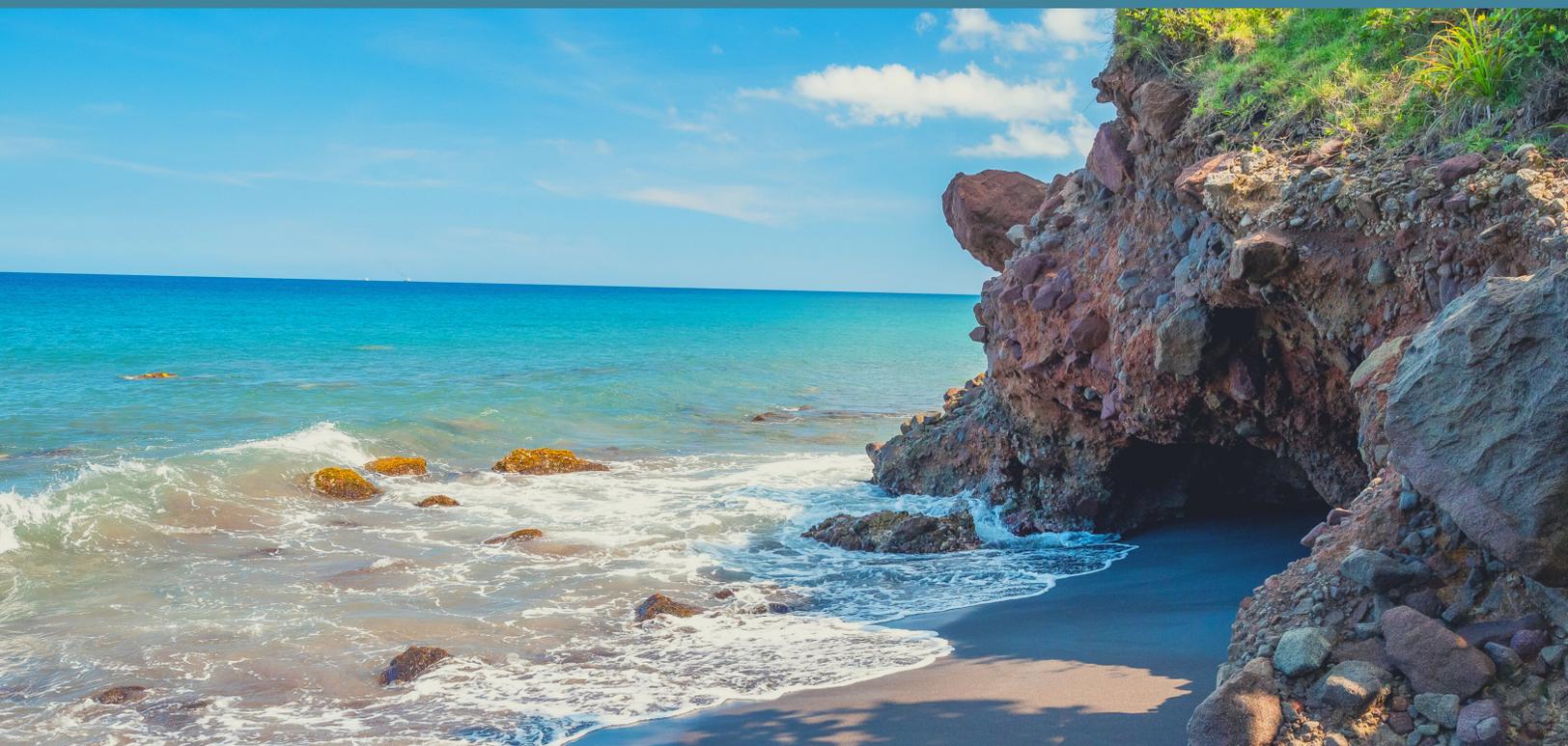
BACKGROUND

A new wave of economic thought referred to as the 'Blue Economy' has recently emerged from the kaleidoscope of coloured economies (green, brown, black, orange). This approach encourages better stewardship of the ocean or 'blue' resources by highlighting in particular the close linkages between the ocean, climate change, and the well-being of people. It also seeks to promote economic growth and diversification, social inclusion and securing coastal livelihoods, while ensuring the environmental sustainability of ocean and coastal areas.

One of the priority areas of work for UNDP Barbados and the Eastern Caribbean is the Blue Economy. UNDP has already supported Barbados, the British Virgin Islands, and Dominica by developing Blue Economy Scoping Studies. In addition, the UNDP Accelerator Lab seeks to promote innovation through 'out of the box' thinking and experimentation to support Small Island Developing States (SIDS) in the sustainable development of their ocean-based economic sectors.

As a long-established partner of the Caribbean region with access to global policy expertise, UNDP is well positioned to support the Government of Montserrat in the development of a Blue Economy Scoping Study. As SIDS work towards implementing Agenda 2030 and contributing to the Sustainable Development Goals (SDGs), UNDP stands ready to support them in achieving their commitments.





INTRODUCTION

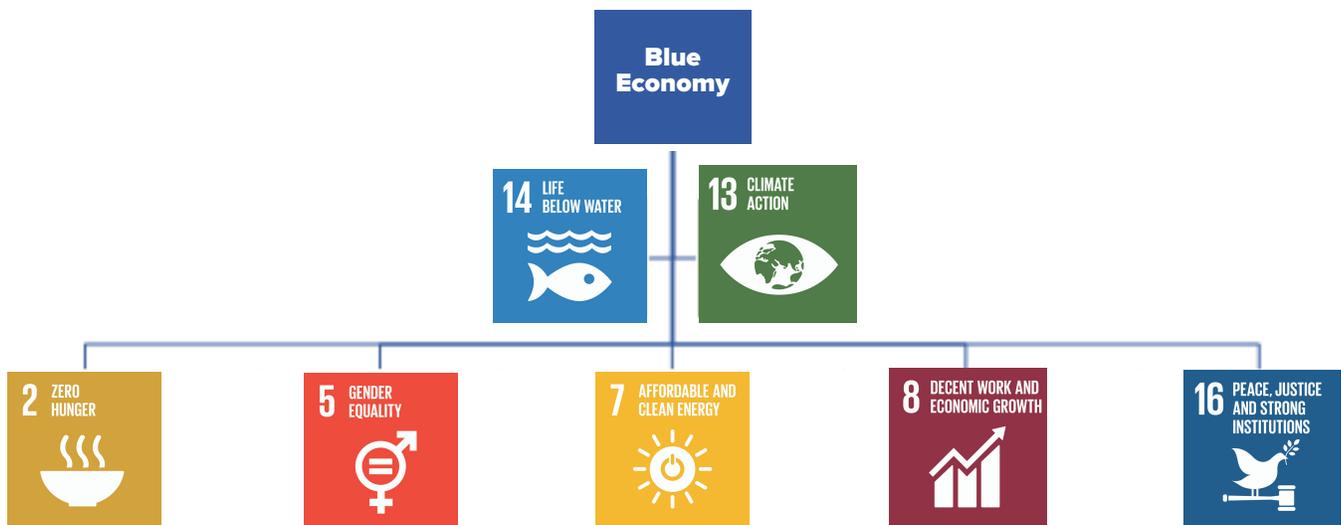
SIDS in the Caribbean are typically viewed as vulnerable and insignificant actors in world affairs, yet they have always 'punched above their weight'. The relatively new self-identification as "large/big ocean states" juxtaposes their minuscule landmass and populations with the possession of sovereign authority over large masses of the world's oceans (Chan 2018). Such authority is increasingly being exercised in the context of the blue economy as a mechanism to realise sustainable economic development from an ocean-based economy.

Montserrat the 'Emerald Isle' is no exception, the island has demonstrated its resilience to external shocks and natural disasters, and is well positioned to capitalise on the blue economy. The coastal and marine areas on the island have developed a rich, multi-layered cultural heritage that should be preserved. Traditional blue economy sectors such as fisheries, ports and shipping and tourism have great potential for expansion to sustainably harness economic benefits. Although hard hit by the COVID-19 pandemic, the blue economy also holds solutions for rebuilding a more resilient, sustainable and equitable new blue normal in the current COVID-19 landscape and effectually a post-COVID world.

For this reason, the UNDP Office for Barbados and the Eastern Caribbean collaborated with the Government of Montserrat and a team of consultants (Appendix I) to undertake a rapid preliminary assessment of the status of Montserrat's Blue Economy, that can help to build a snapshot of the island's current blue wealth and productivity. The assessment aimed to uncover the constraints to developing a more productive blue economy and assess the potential for generating greater value, creating equitable blue growth and promoting climate resilience. The study is gender responsive and human rights based, to support Montserrat in building an equitable blue economy.

THE BLUE ECONOMY AS A SUSTAINABLE DEVELOPMENT FRAMEWORK

The Blue Economy (BE) is an increasingly popular concept defined as a strategy for safeguarding the world’s oceans resources by balancing economic needs with the ocean’s long-term ecological capacity and health. It also acknowledges the socio-cultural importance of seas and oceans to many coastal communities globally. The BE is strongly linked to the United Nations Sustainable Development Goals Agenda 2030. The achievement of SDG 14 – Life Below Water is explicit, however the BE is also associated with SDG 2, 5, 7, 8, 13 and 16. The BE is directly dependent on the health of marine species and ecosystems (SDG 14) which is affected by the earth’s climate (SDG 13). These two ecological environments in turn support the ability for humans to produce and access food (SDG 2), provide opportunities for participation in society by vulnerable groups such as women and girls, produce energy (SDG 7), create sustainable livelihoods (SDG 8) and an opportunity for developing stronger partnerships and institutions for human well-being (SDG 16).



Despite the many definitions for the BE, at the core of the concept is the de-coupling of socioeconomic development from environmental degradation (World Bank and United Nations Department of Economic and Social Affairs 2017). Further, the Commonwealth (2020) states the blue economy aims to improve human wellbeing and social equity while significantly reducing environmental risks and ecological scarcities. Both definitions provide a paradigm shift from traditional exploitative economic, activities with negative externalities on the environment towards a more holistic perspective of satisfying human needs within biophysical limits in order for both people and the planet to thrive.

Given the advocacy of SIDS for the promotion of the BE, the Caribbean Development Bank’s four central areas of the BE are instructive for Caribbean small islands such as Montserrat.

1. Sustainable and inclusive growth and development
2. Reducing the risk of over exploitation and risky methods of extraction/ usage of the ocean’s resources;
3. Enhancing the welfare of coastline communities in terms of economic opportunities and social protection; and
4. Ensuring resilience of countries to natural disasters and the impact of climate change. (Caribbean Development Bank 2018)

This report is positioned within the above conceptual context of the BE.

BLUE ECONOMY ADVANCEMENT IN THE CARIBBEAN

According to Patil et al. 2020, Caribbean states have expressed the desire to explore BE policies in numerous high-level fora. A significant event was the inaugural Caribbean Region Dialogue with the G20 Development Working Group that took place in April 2015. Finance ministers and central bank governors focused on the development of Blue Economies and on the resources needed.

Since then there have been several strides made towards incorporating Blue Economy policies into regional and national development agendas (Clegg et al. 2020). The extensive Caribbean presence at the Sustainable Blue Economy Conference held in Nairobi, in November 2018, underscored the interest of a broad cross section of countries in the region (IISD, 2018).

In 2016, Grenada developed its Blue Growth Coastal Master Plan and the associated Integrated Coastal Zone Management Policy (Patil et al., 2016). In 2018 Barbados established the first ministry focused on the Blue Economy (The Ministry of Maritime Affairs and the Blue Economy) and is currently pursuing the development of a blue economy roadmap informed by the completion of the UNDP Blue Economy Scoping Study. In June 2019, UN Environment Caribbean Environment Programme (CEP) and the Government of Honduras hosted the Blue Economy Summit in Roatán, Honduras aimed at advancing a regional Sustainable Blue Economy Strategy for the Caribbean. In August 2019, Mexico reaffirmed its commitment to a Sustainable Ocean Economy at the High- Level Panel for a Sustainable Ocean Economy. Costa Rica has developed its Oceans Economy and Trade Strategies. Most recently in 2020, Belize established the Ministry of Blue Economy and Civil Aviation.

Regional organisations have also been instrumental in promoting Blue Economies. In 2014, countries urged the Association of Caribbean States (ACS) to use its Caribbean Sea Commission, then chaired by Costa Rica, to jumpstart a wider discussion on the Blue Economy. The CDB launched Blue Economy Caribbean in November 2018 as a call for the region to prioritise coastal and marine economies that are sustainable, scalable, inclusive and environmentally sound.

The second Blue Economy Caribbean conference and exposition took place in October 2019. It reviewed progress and programme development since the first conference and explored related issues such as technology, partnerships and gender equality.

The Organisation of Eastern Caribbean States (OECS) is also committed to transitioning its member states to Blue Economies. In October 2017 it obtained a US\$6.3 million grant from the World Bank for its Caribbean Regional Oceanscape Project (CROP). In October 2019, the CARICOM Caribbean Regional Fisheries Mechanism (CRFM) and the Central American Integration System (SICA) Fisheries and Aquaculture Organisation (OSPESCA) signed a joint declaration for cooperation on Blue Economic Growth in their 24 Member States. Despite these advances neither CARICOM, SICA nor the ACS appear to have well-articulated strategies for supporting Blue Economies in their member states (Clegg et al. 2020).

UN agency programmes such as the FAO's Blue Growth Initiative, UN Environment's Blue Economy support programme and UNDP's Accelerator Labs can be expected to positively affect Blue Economy efforts in the region either directly or through their regional bodies. UNDP Barbados & Eastern Caribbean established its Accelerator Lab focussed on the blue economy in September 2019 to "promote out-of-the-box thinking and experimentation" in Small Island Developing States (SIDS)".

This initiative has a special focus on supporting sustainable development of ocean-based economies through the co-creation of grassroots solutions to challenges within the blue space. Many projects and initiatives around the region are already oriented to Blue Economies or are rebranding with it in mind.

For example, the region wide Caribbean Large Marine Ecosystem (CLME) Project (Debels et al., 2017) is emphasising the critical importance of its activities, especially the proposed regional ocean coordination mechanism, for supporting Blue Economies (Clegg et al. 2020).



SCOPE AND ELEMENTS OF THE REPORT

This report documents findings based on a mixed methods approach to provide guidance on charting the way forward to building an equitable blue economy in Montserrat. The rapid assessment was supported by a document analysis of journal articles, grey literature, technical reports and a broad range of policy and legal documents.

Stakeholders were also engaged through key informant interviews (n=16), focus groups (n=3) that featured foresight and visioning exercises, the distribution of a survey (n=29), 2 virtual validation workshops, and 6 radio appearances on the Blue Zone and MAHLE Vibes radio shows to engage the general public. All face to face interactions were in line with GoM COVID-19 regulations due to the low number of cases (zero active cases) during the time of stakeholder consultations. Other communication and outreach activities included social media engagement, the production of two short videos, and the development of an infographic and artwork based on the blue economy vision articulated by stakeholders.

An analysis of the socio-economic context was undertaken including considerations of the COVID-19 pandemic. The social and economic analysis focused on sustainable and equitable economic growth, including attention to gender equality and people-centered development.

For the purpose of this rapid assessment equitable blue growth is considered in the context of the specific SDGs as follows:

Goal 2 (Zero Hunger) achieved through the critical role living marine resources play in food security.

Goal 5 (Gender Equality) the promotion of equal ease of access to resources and opportunities regardless of gender in all ocean related activities.

Goal 7 (Affordable and Clean Energy) the contribution marine renewable sources play in energy security.

Goal 8 (Decent Work and Economic Growth) the diversification and growth of marine-based economic sectors.

Goal 13 (Climate Action) the implicit link between the oceans and climate change, and the adaptive measures countries can take to maintain ocean integrity and resilience.

Goal 14 (Life Below Water) identifying risks to the marine environment, especially to marine living resources, and proposing strategies that mitigate those risks.

Goal 16 (Strong Institutions) establishing robust national marine regulators and incorporating participatory processes in decision making about marine management issues.

The narrative that follows this introduction aims to synthesise and summarise existing information on current blue wealth and productivity supported by the research findings. Further documented were the constraints to developing a more productive blue economy and give recommendations on the potential for generating greater value, creating equitable blue growth and promoting climate resilience.

The report is divided into **9 main sections** which are outlined in more detail below. References and appendices close the report.

The initial action plan is presented as a separate Annex as a guide for next steps in the development of the blue economy in Montserrat.

Section 2 summarises the blue economy vision 2035 articulated by the people of Montserrat. The overall vision is presented based on a shared value approach. The section also outlines key stakeholders and their relationships, major conflicts and challenges (current and future) and opportunities for Blue Growth.

Section 3 outlines the geographical and environmental context with emphasis on the regional setting, climate, and marine habitats and resources. Coastal and shallow reef habitats, offshore ecosystems and marine species and biodiversity are also highlighted. Risk and threats to the marine environment close the section.

Section 4 provides a brief overview of the economic context. Current socio-economic conditions as well as the impacts of COVID-19 are presented. The section ends with a treatise with investment provisions and recommended blue growth opportunities.

Section 5 presents a profile of marine economic activities in Montserrat. Sectors highlighted include tourism and leisure, marine living resources including capture fisheries, ports and shipping among others.

Section 6 provides a snapshot of Montserrat's socio-economic context and presents summary findings of social and economic considerations. Blue Economy Development and the Social Solidarity Economy is proposed. A brief overview of the Montserrat Social and Economic Policy and Planning Landscape is presented. The section ends with Considerations for Equitable Blue Growth for Women and Men.

Section 7 provides an overview of existing governance arrangements, including the policy setting, institutional arrangements and legal framework that can promote blue economy development in Montserrat.

Section 8 outlines nine enablers that support the enabling environment for equitable blue economy development and the associated policy implications.

Section 9 details conclusions and next steps for Montserrat in exploring blue economy opportunities. A brief overview of the initial action plan is presented. The section closes with recommendations for a 'Blue Hub'.

Bibliography: A list of literature cited and reviewed are presented as a resource for further reading.

Appendices close the report. Items include the Terms of Reference for each consultant, a list of stakeholders, complementary blue economy activities underway in Montserrat, the international and regional policy environment and a glossary.



Blue Economy Vision 2035

The Emerald Blue Isle
2035



BLUE ECONOMY VISION 2035

Foresight and visioning exercises were used by the UNDP Accelerator Lab for Barbados and the Eastern Caribbean, and integrated into the methodology employed in the Blue Economy Scoping Study for Montserrat. These exercises have proven effective in promoting innovation into the Lab's work in engaging stakeholders and providing policy advice.

A normative scenario was constructed based on stakeholder interviews and consultations. Normative scenarios are like visions for the future. Given Montserrat is at the early stage of developing its Blue Economy, visioning exercises can assist in strategic planning for the development of the sector.

The aim of the exercise was to identify the main activities (economic, environment and social), actors and values of the Blue Economy space of Montserrat's future. Three focus groups participated in the visioning exercises – government officials, fishers, and youth. Based on the visioning exercises the main activities, actors and values were collated to develop the narrative below which reflects the information provided by stakeholders. This scenario is not a representation of all the possibilities for the future of Montserrat's Blue Economy, but an image of the future driven by stakeholder consultation within this scoping study.

EMERALD BLUE ISLE 2035

Surrounded by lush green hills and translucent blue waters, the residents of Montserrat enjoy a life that is tranquil, community oriented and focused on holistic prosperity.

The island's governance system is people-centered and policy is developed and created around the well-being of its citizens and ensuring 'honorary' Montserratians are integrated into the way of life on the island. Montserrat's Blue Economy contributes 25% to the island's economy and is guided by prosperity, sustainable livelihoods, environmental stewardship, climate resilience and community spirit. All ocean and coastal activities are guided by a Marine Spatial Plan which is reviewed annually by the Ocean Governance Committee with participation from stakeholders.

The sectors that drive the BE are research tourism, a luxury yachting and sailing community supported by weekly calls from cruise liners, shipping and fisheries. The Little Bay Port and Smart Coastal Village is a central hub of activity on the island where services such as shopping, dining and entertainment are provided for locals and tourists. The Port is also the main connector of ocean energy supported by wave energy systems which are a part of the renewable energy matrix.

Fishing on the island is done using smart gear and boats are equipped with the latest technology to ensure safety and energy efficiency. Fish farms are operated through private-public partnerships led by the Montserrat's Fishing and Boating Cooperative Society. Local catches are sold to the domestic market and high value fisheries such as tuna and diamondback squid are exported. Fish landings are reported using mobile apps and real time markets allow fish to be sold before boats return to shore. Local boat building is also a key feature of the fishing industry and the activity also supports cultural-ecological heritage and social cohesion within the fishing community.

Research tourism attracts some of the world's leading universities and research institutes that work alongside local NGOs and marine specialists (marine biologists and engineers) to study Montserrat's marine ecosystems and species for science exploration and marine pharmacology.

The research community is supported by a state of art marine lab which also serves as a centre for community activities. The lab also employs data analysts and educational content creators who provide services to clients in the global information economy. The island's schools benefit from scheduled educational tours from the research community and students experience the island's beaches, not only as recreational sites, but also as educational environments to build ocean consciousness and awareness from a young age.

The St. Patrick's Festival includes its own 'St. Patrick's Blues,' which attracts younger tourists to the island for yacht parties, aquatic sports competitions (free diving, sailing, surfing etc.), blue fashion shows and cultural tours showcasing the island's musical legacy. Black sand wellness treatments are also a highly sought-after activity by tourists.

Recreational diving is a major attraction and people from all over the world visit to see shipwrecks and underwater coral sculpture parks designed by local artists depicting the buried city at Plymouth where the Volcano Princess resides. A key area of funding for the Diaspora Direct Investment (DDI) programme are blue entrepreneurial activities. The programme pairs angel and impact investors with local entrepreneurs to supply seed funding for new innovative businesses in the coastal and marine environment. DDI is a blended finance mechanism and philanthropic proceeds are also welcomed through the programme to aid in conservation activities.

Civil society, government and the private sector all participate in marine protection and conservation activities. Monthly beach clean ups are organised by the NGOs and private businesses are eligible for tax relief when staff participate in clean ups and implement eco-friendly business practices. Montserrat Marine Watch (MMW) is a civil society organisation which supports the policing of the island's beaches and territorial ocean and works alongside the coast guard. MMW also provides surveillance and protection to the research community open ocean projects. All beaches are accessible to residents and social gatherings such as picnics, sea baths and religious activities (baptisms) are daily occurrences.

Every person who lives or visits Montserrat is cocooned in a nature-based way of life which is supported by technology and driven by ensuring people’s well-being is nourished. The ocean is a giver of life.

TABLE 1: SCENARIO KERNELS AND ELEMENTS/DESCRIPTORS

Kernel	Elements/Descriptors
Value System	Prosperity and well-being, environmental stewardship, community spirit
Economic Sectors	Tourism (research, yachts, and cruises), Fishing, Shipping, Marine Science and Pharmacology
Environmental Activity	Beach clean ups, marine coastal and marine protection, marine ecosystem and species conservation, recycling
Societal Activity	Sea baths, picnics, swimming, beach parties, religious practices (baptisms), St. Patrick’s Blues
Actors	Ocean governance committee, fishers, civil society, NGOs, government agencies, foreign & diaspora investors, local private sector, blue entrepreneurial and professional class, international research institutions, local communities, tourists
New Sectors	Research tourism, shipping, fish farming (mariculture), water sports
Policy Tools	Marine Spatial Plan, Marine Managed Area, Ocean governance policy
Barriers to Desired Future	Lack of political will, limited financial and human resources, limited awareness, and societal apathy
Enablers to Desired Future	Enthusiastic youth, Montserrat National Trust, Montserrat Fishers and Boat Association, Little Bay Port, Small Size



Geographical and Environmental Context



Montserrat is a mountainous, volcanic small island nation with a land area of 39.38 sq. miles (Figure 1). The pear-shaped island, part of the Lesser Antilles chain, is known as the “Emerald Isle of the Caribbean,” in part because of both its Irish ancestry and striking resemblance to coastal Ireland. The cultural icon and national emblem is an Irish Shamrock, frequently integrated into business logos and is even a main feature on the passport stamp.

Montserrat is located about 27 miles (43 km) southwest of Antigua and about 30 miles (50 km) northwest of Guadeloupe. The terrain of Montserrat is generally steep, and the ocean depth increases quickly from the shoreline. As a result, the continental shelf area is narrow at just 168 sq. km. Montserrat measures approximately 16 km (10 mi) in length and 11 km (7 mi) in width, with approximately 40 km (25 mi) of coastline and a 7,587 sq. km exclusive economic zone (EEZ).

Figure 2 shows the claimed Maritime Boundaries of Montserrat with its neighbouring islands. According to the marine and fisheries sector report (OCTA 2017), "the boundaries between St. Kitts and Nevis, Antigua and Barbuda and The UK Government in relation to Montserrat are under maritime delimitation discussions.

The discussions between The United Kingdom (Montserrat), St Kitts and Nevis and Antigua concern the delimitations related to Redonda Island amongst others. However Montserratian fishers have a very long tradition of fishing around Redonda Island and it is an important fishing area for the food security of Montserrat, considering its narrow continental shelf area."

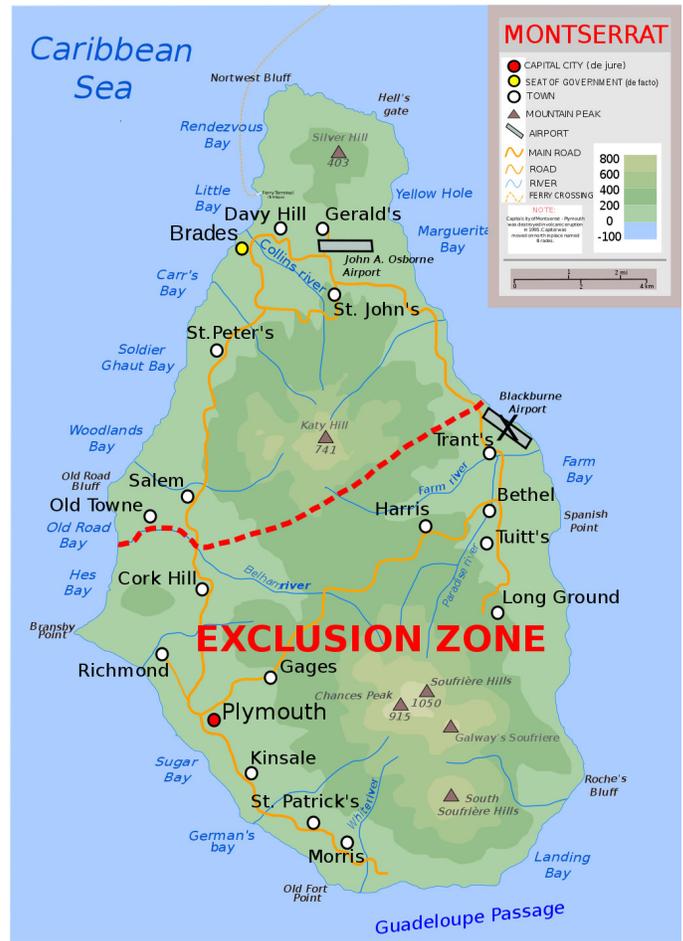


FIGURE 1: TOPOGRAPHIC MAP OF MONTERRAT (SOURCE: WIKIPEDIA)

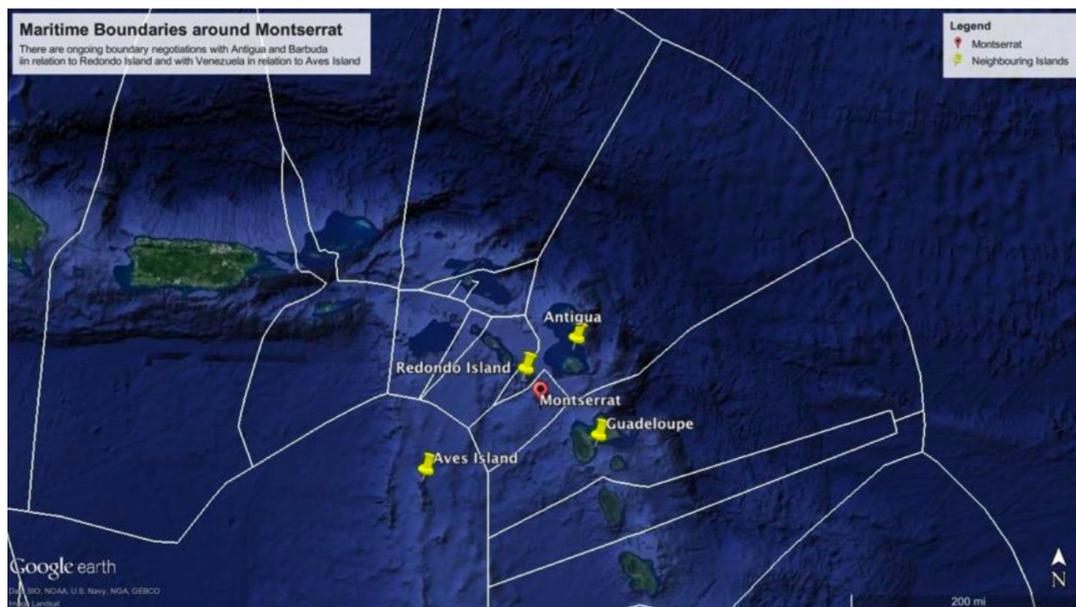


FIGURE 2: MAP SHOWING THE MARITIME BOUNDARIES UNDER NEGOTIATIONS AROUND MONTERRAT (SOURCE: GOOGLE MAP)

GEOGRAPHICAL CONTEXT

The delimitations between Guadeloupe and Montserrat were concluded on the 27 June 1996. There are ongoing delimitation deliberations talks between The UK Government and Venezuela related to Aves Island (OCTA 2017).

The island has demonstrated its resilience to natural hazards such as hurricanes and volcanic eruptions that have impacted Montserrat in the past with devastating outcomes. The southern half of the island is an exclusion zone and is uninhabitable due to a catastrophic volcanic eruption in 1995 and another in 1997. Eruptions and associated volcanic activity also occurred in 2007, 2008 and in 2010.

In 1989, Hurricane Hugo made landfall as a Category 4 hurricane, causing major destruction on land. Anecdotal reports indicate that all native seagrass beds were destroyed as a result of the storm. Additional impacts on the marine environment are currently unknown. Volcanic eruptions have released large amounts of volcanic ash and highly acidic, nutrient-rich pyroclastic flows into the nearshore waters burying the largest mangrove forest on the island along with considerable sections of coral reef habitats.

Active eruptions continued through 2012. The leaching of volcanic sediments and lahars from runoff continue to the present day, impacting nearshore water quality (Waitt 2018). After the resumption of volcanic activity in 1995 and up to 2000, an estimated 8,000 persons left the island. However, since then some have returned. The current population of Montserrat is 4,993 based on the latest United Nations estimates (2020). More detailed information on demographics is provided later in this report.



ENVIRONMENTAL CONTEXT

A scientific assessment of Montserrat’s nearshore marine environment was conducted by the Waitt Institute over a 2-year period (2015-2017). The assessment provides detailed information on the benthic habitats (Figure 3), flora and fauna, and fish populations surveyed. The main findings are reported in the narrative below.

Surveys of shallow sites showed that coral reef and other hard-bottom habitats were dominated by turf algae (23-50% cover), macroalgae (8-18%) and non-biogenic substrates (e.g. rocks, rubble, sand; 16-40% cover). Coral cover averaged only 10%, with an average of 15 coral species, hence ‘coral reef’ habitat is actually dominated by algae. This finding is common across many locations in the Caribbean.

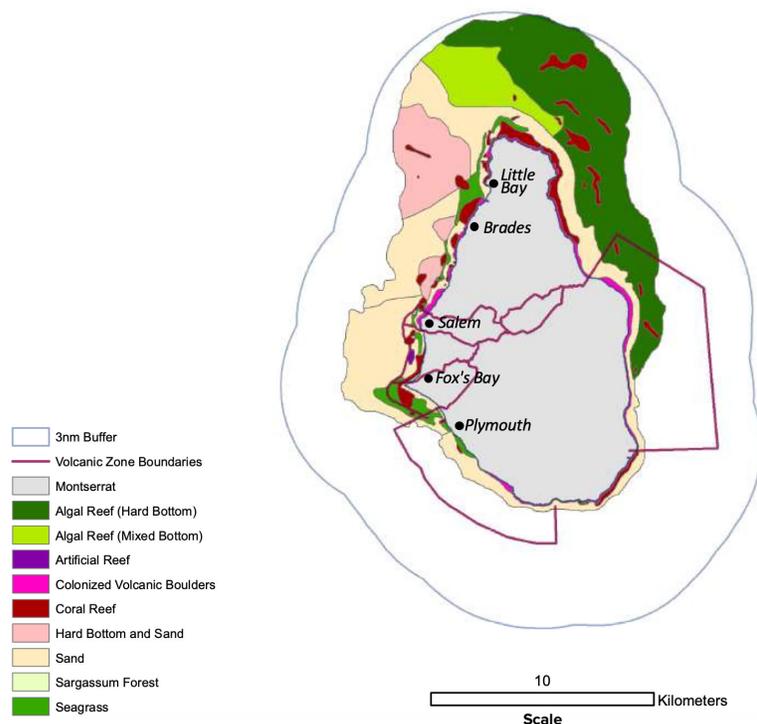
Higher coral cover (18-21%) and greater species diversity (up to 20 hard coral species) were found on reefs off the north coast and at the southeast end of the islands. Giant barrel sponges were noted as providing 3-dimensional structure to the reefs at many sites. Seagrass beds constituted 19% of sites surveyed, and were composed of the invasive seagrass *Halophila stipulacea*. In the southwest and east sides of the island, colonised volcanic boulders form a unique habitat (Waitt 2018).

The survey also found hard bottom, mesophotic zone (30 - 100m) habitats at the northeast side of the island shelf, and also offshore from Little Bay in the northwest. Flethy macroalgae and sponges dominate these survey sites, though corals of the genera *Agaricia*, *Montastraea*, and *Orbicella* were found in low abundances. The remainder of the mesophotic shelf area surveyed was composed of soft bottom, with a few seagrass beds of the invasive species *Halophila stipulacea*.

Fish

One hundred and fifty-seven reef fish species were observed during the SCUBA surveys, with seagrass sites having fewer species than other habitat types. Reef fish biomass was observed to be highest at the southern end of the island and along the west coast, extending around the north end of the island. The average island-wide fish biomass of 94 gm⁻² (SD = 121 gm⁻²) is lower than the average biomass at other island sites in the region.

FIGURE 3: BENTHIC HABITATS OF MONTSERRAT. SOURCE: WAITT INSTITUTE 2018



This could be due to the impacts of volcanic eruptions and fishing pressure. Parrotfish biomass was also low (5.1 gm⁻², SD = 7.3 gm⁻²) compared to regional averages, and two-thirds of parrotfish are less than 15 cm in length. Large groupers and snappers were absent from the survey sites. Two-thirds of fish classified as carnivorous were less than 25 cm in length. These results strongly suggest fishing pressure is impacting fish populations by selectively removing larger individuals. Invasive lionfish were found at 24% of sites surveyed as both juveniles and adults suggesting they are well established, yet their density is less than half that found on reefs in the Bahamas (Waitt 2018).

Sharks were present on 18% of the baited remote underwater videos (BRUV) deployments and rays on 50%, with 3 species of each seen; Southern stingray (*Hypanus americanus*), Roughtail stingray (*Dasyatis centroura*), and yellow round ray (*Urobatis jamaicensis*), Caribbean reef shark (*Carcharhinus perezi*), nurse shark (*Ginglymostoma cirratum*), and lemon shark (*Negaprion brevirostris*). Reef shark presence was half that found in a well-protected MPA in Belize, possibly indicating that numbers in Montserrat have the capacity to increase (Waitt 2018).

The offshore fish resources in Montserrat's EEZ are not well known. In general, large pelagic species migrate throughout the Atlantic and Caribbean Sea. Species frequently landed include dolphinfish, kingfish/wahoo, swordfish, marlin, sailfish, Atlantic yellowfin tuna and Atlantic big eye tuna (OCTA 2017). Conch (*Strombus giga*) and Lobster (*Panulirus argus*) are also frequently caught.

Turtles

According to Martin et al. 2005, four species of sea turtles have been reported as nesting in Montserrat. Early studies suggested that the green (*Chelonia mydas*) and hawksbill (*Eretmochelys imbricata*) turtles nested in small numbers, whilst loggerhead (*Caretta caretta*) and leatherback (*Dermochelys coriacea*) turtle nests were only occasionally encountered.

Both adult and juvenile hawksbill and green turtles are found in Montserrat's inshore waters. Montserrat's Turtle Ordinance (1951) states that turtles can be captured, sold and bought during an annual open season (1 October to 31 May).

Although there are no quota or species restrictions, harvested turtles must weigh at least 20 lbs (ca 9.1 kg), and there are no restriction on the maximum size of harvested turtles. For several years now, the island's fisheries authorities have been attempting to raise awareness about biodiversity conservation and turtle stock management issues among the island's local fishermen (Martin et al.2005).

Cetaceans

A visual cetacean survey conducted in Montserrat waters during December 2007 and May 2010, recorded nine cetacean sightings (Weir et al. 2011). Species identified included the pantropical spotted dolphin *Stenella attenuata*, Fraser's dolphin *Lagenodelphis hosei*, sperm whale *Physeter macrocephalus*, humpback whale *Megaptera novaeangliae*, and sightings of unidentified dolphins and large whales.

Acoustic monitoring undertaken during December 2007, resulted in 19 cetacean detections. Sperm whale and unidentified dolphin detections predominated. Two acoustic detections were of pantropical spotted dolphins, corresponding with visual sightings. An opportunistic sighting of 14 pygmy killer whales *Feresa attenuata* during October 2008 was reported (Weir et al. 2011).

Risk and threats to the marine environment

The most relevant threats to Montserrat are listed below:

- Impacts of climate variability and change (coral reef bleaching, ocean acidification);
- Natural disasters (hurricanes, and volcanic eruptions);
- Sargassum influx events;
- Invasive species; and
- Anthropogenic activities such as land based sources of pollution.
- Potential threats include unsustainable fishing and sand mining. Further research is needed to determine the level of impact these activities have on the marine environment.



Economic Context

Background

COVID 19 Economic Impact – Fiscal and Social Implications

Economic and Development Priorities

Investment Climate: Treaties with investment provisions

Implications for blue growth



BACKGROUND

In the last 30 years Montserrat has experienced external shocks and natural disasters that have had a lasting impact on social and economic development. In 1989 the island was hit by Hurricane Hugo causing widespread damage, and in 1995-1997 the volcanic eruption caused deleterious effects on the economy and the society. The 1997 eruption saw two thirds of the 12,000 people living on the island migrating (GoM 2020), with several parts of the island remaining uninhabitable up to today. However, according to key stakeholder interviews undertaken for this rapid assessment, some closed areas are being considered for infrastructure development. Data for 2019 show a total population of 4,519 people, 2,272 females and 2,247 males. As it relates to occupational sex, segregation is a feature of the Montserrat social and economic landscape, including for blue economy sectors like fisheries.

Prior to the volcanic eruption, the Montserrat economy was diversified with productive sectors in agriculture, fishing, mining, manufacturing, electricity & water and construction. Since then the economy has relied heavily on the expansion of the public sector which accounts for 46% of the island’s output and aid financing through DFID. In 2016, the economy in comparison to 1994 has reduced by almost half and productive sectors now represent a small proportion of the island’s output.

Table 2 shows the GDP comparisons in 1994 and 2016 by industry. All industries have recorded reduced economic output with wholesale/retail, hotels and restaurants and production being the areas being the most affected. This reduction in economic activity can be linked to the migration of persons after the eruption of the volcano (Mott MacDonald 2018). GDP growth between 2008-2018 has averaged 1.39% with the largest reduction occurring in 1996 at 26% , the year after the volcano erupted (Figure 1).

TABLE 2: GDP COMPARISON IN 1994 AND 2016

GDP by Industry, in constant 2006 Basic Prices (EC\$M)	1994	2016	Growth
Production	53	16	-70%
Wholesale/retail	43	8	-83%
Hotels & restaurants	15	3	-79%
Transport etc	30	15	-48%
Finance	30	18	-39%
Real estate	53	19	-65%
Public sector	55	70	28%
Other	6	3	-49%
Total	285	153	-46%

Source: Mott MacDonald 2018

TABLE 3: GDP SECTORAL BREAKDOWN (2018)

Economic Sector	EC\$M
Public Administration, Defence & Compulsory Social Security	50.88
Real Estate, Renting and Business Activities	19.55
Transport, Storage and Communications	16.83
Health and Social Work	12.42
Financial Intermediation	12.04
Wholesale & Retail Trade	9.64
Education	6.01
Construction	5.23
Other Community, Social & Personal Services	4.33
Electricity & Water	3.77
Manufacturing	3.69
Mining & Quarrying	3.45
Hotels & Restaurants	3.17
Agriculture, Livestock and Forestry	1.28
Activities of Private Households as Employers	0.58
Fishing	0.29

Source: (Statistical Department Montserrat 2020)

In 2018 Montserrat’s GDP was EC\$152,180,000 and the top three contributing sectors were: (i) public administration, defence and compulsory social security, (ii) real estate, renting and business activities and (iii) transport, storage and communications representing 57% (EC\$87,260,000) of economic activity (Table 3).

The value of merchandise exports from Montserrat totalled US\$3.37 million in 2014. The top three exports were natural sand (HS1 code 2505) accounting for 45% of exports valued at US\$1.54 million, machinery for earth and mineral extraction (HS code 8430) representing 12% of exports valued at US\$400,000 and aggregate (HS code 2517) accounting for 11% of exports valued at US\$385,000; other exported products are minuscule in volume and value.

Montserrat’s main export trading partners are the USA with a share of 28%, France with a share of 23% and Saint Kitts and Nevis with a share of 22% (Trending Economy 2020).

Production by sand mining companies is Montserrat’s main visible export, accounting for a record high 99% of the country’s exports by volume in 2010. The industry has the potential for managed growth however, there are concerns that if mining continues without appropriate regulation, it could lead to environmental damage to coastal ecosystems (wetlands) and affect the visitor economy. Also, the industry poses threats to wildlife habitats and is a source of noise and air pollution to residents (Mott MacDonald 2018). The GoM has pledged to put in place a formalised revenue regime for the industry to regularise the current royalties earned from the sector (Ministry of Finance & Economic Management 2020).

Sand mining, which is permitted on beaches, is used in construction, mainly for the plastering of buildings. Mining on beaches occurs on average every three to four months and is monitored and regulated by the Ministry of Agriculture, Trade, Lands, Housing & the Environment for a fee.

The economy of Montserrat has experienced a low positive growth rate since 1978 with an average GDP growth rate of 1.4% during 1978-2018. The highest level of GDP growth was attained in 1988 at 8.6% and its lowest decline in activity in 1996 a contraction of 26.8% one year after the eruption of the volcano (Figure 4). Although the country’s economy has been negatively affected by COVID-19, Brexit remains a major long term factor in the development of the island’s economy and the GoM is committed to managing the economic consequences that the United Kingdom and consequently Montserrat may have to endure because of it (Ministry of Finance & Economic Management 2020).

FIGURE 4: GDP GROWTH RATE (1978-2018)



Source: (Statistical Department Montserrat 2020)

COVID-19 IMPACT

As mentioned previously, Montserrat, like the rest of the world, has suffered a downturn in economic activity due to the COVID-19 pandemic. The government has implemented a number of fiscal measures to counteract the impact of the coronavirus pandemic on businesses and households. In March 2020, the island received direct support of £2.5 million being provided to tackle the crisis from DFID. For April and May the government spent over EC\$3.5 million in fiscal support and a further EC\$3.4 million before the end of June. The GoM also engaged the health care services of a Cuba Medical Team at a cost of EC\$1.4 million.

This is a total spend of EC\$8.3 million on COVID-19 support. For the financial year 2020/2021 the government is expected to run a fiscal deficit of EC\$22 million with the expectation that revenue streams will be significantly impacted (Ministry of Finance & Economic Management 2020).

It is unclear based on published data what the social and economic situation is right now in Montserrat. In December 2020, there was some indication from key stakeholder interviews for this rapid assessment that whilst the COVID-19 pandemic initially saw large numbers of people being laid off in March 2020, some persons have returned to work. Further to this, according to stakeholder discussion, quite a few of the businesses are still “somewhat depressed and have to adjust, [possibly leading to] retrenchment and making people redundant”.

The GoM undertook a COVID-19 Business Impact Assessment at the onset of the ‘lockdown’ in March 2020, and following on this, implemented a COVID-19 Social Benefit Support Programme.

In addition, the GoM can consider investigating what social benefits provisions are remaining for those still suffering loss of income due to the pandemic, and who are utilising the services (men, women, girls and boys).

At the time of writing this report, initial financial support specifically for those affected by loss of income due to the COVID-19 pandemic has been stopped according to official Government Websites for the Ministry of Finance and Economic Management and the Ministry of Health and Social Services, Social Services Department. This has been validated in stakeholder discussion.

The GoM undertook a COVID-19 Business Impact Assessment at the onset of the ‘lockdown’ in March 2020, and following on this, implemented a COVID-19 Social Benefit Support Programme.

Several months later, and after initial support was stopped, it is important to determine the number of women and men still unemployed or experiencing reduced working hours, since the business impact assessment was conducted.

The business impact assessment noted that the businesses “most populated by labor force were: Accommodation, Construction, Food & Beverage, General Retail, and Taxi & Tours ... [and that] [t]he Tourism industry alone accounted for 38% of the respondents, followed by Construction- 14% and Agriculture and General Retail, both representing 8% respectively. The evidence suggests a highly concentrated service-based economy which tends to consist of a number of sole traders and entrepreneurs (GoM 2020).”

This implies not only job loss, but that persons who were engaged in informal employment would remain without the benefits which would be provided to those in formal employment. Informality was highlighted in the impact assessment, which also found that “[t]he lack of formality was most noticeable in the agricultural, tourism and construction industries,” which carry the bulk of current blue economy activity in Montserrat. Informality and the implications for blue economy development will be discussed in more detail later on in this assessment.

The COVID-19 Business Impact Assessment results and initial financial/social benefits provided are summarised below. These provide an idea of what the initial impact and response was to the pandemic. The report can be found at: <http://bit.ly/MNICovid19>

The report findings are summarised as follows:

Amongst the industries that were assessed, the most populated by labour force were: Accommodation, Construction, Food & Beverage, General Retail, and Taxi & Tours.

The Tourism industry accounted for 38% of the respondents, followed by Construction - 14% and Agriculture and General Retail, both representing 8% respectively. The evidence suggests a highly concentrated service-based economy which tends to consist a number of sole traders and entrepreneurs.

The COVID-19 pandemic has attributed to approximately EC\$ 3,600,000.00 in economic disruptions, for the assessment period. This has had a direct impact on the livelihoods, of eighty-five percent (85%) or almost 900 individuals represented in the assessment. A total value of EC\$ 1,600,000.00 in monthly salaries/wage disruptions was caused, at an average of EC\$ 1,800.00 per employee.

62% of all businesses assessed were registered, 33% of all businesses recognised as sole traders or self-employed. This demonstrates that a significant portion of the business sector on Montserrat operates on an informal basis. The informality is suggestive that many businesses are not registered with the appropriate entities and there is a general lack of compliance with business regulations. The lack of formality was most noticeable in the agricultural, tourism and construction industries.

254 businesses highlighted that 'Loss/Reduction in Revenues was the major impact experienced. This would impact cash flow, reducing the available working capital to service business loans, administer wages/salaries and attend to fixed costs. 35% of businesses (101 businesses) are servicing business loans valued at \$337,000 per month. In the absence of regular business activities, reduced cash flow would impact their ability to repay loans. It is highly likely that financial institutions are also likely to experience reduced inflow, as a result. The primary industries servicing loans are: Construction, Food and Beverage, General Retail, Taxi and Tours, Mining, and Real Estate.

On average, the businesses that participated in the COVID-19 Impact Assessment have been in operation for at least 12 years. 60% of all individuals represented in the exercise were considered full-time employees. 20% of businesses are part of a private sector support organisation. The most common were Montserrat Chamber of Commerce, Farmer's Association and Taxi and Tours Association. 60% of businesses are male dominated. Traditionally, the common industries with a strong male presence are: Tourism, Construction and Agriculture.

RECOVERY AND BUILDING FORWARD BETTER

Montserrat has the unique opportunity to capitalise on the emerging blue economy as a way to build forward better in light of the COVID-19 pandemic. Based on findings, there is a good level of awareness about the concept of the BE and a willingness to explore opportunities. However, more than half of the stakeholders who took part in the survey or key informant interviews were not aware of BE initiatives being undertaken in Montserrat. This suggests the need for more awareness raising and a refined BE vision.

Stakeholders identified the following values that can drive BE activities: Ecosystem Stewardship; Wealth Creation; Community Spirit; and Prosperity and Well-Being.

In addition to stakeholder feedback, it was noted that blue economy development has the potential to:

- support local economic development and strengthening
- promote sustainable development with socio-economic and ecological resilience as a built-in component of this, that is; it recognises that socio-economic and ecological systems are interconnected and interdependent, and therefore this approach to blue economy development highlights socio-ecological systems that can support economic activity, without depleting and polluting the natural environment

More explicit recommendations are made further in the report, noting the importance of integrated governance mechanisms and corresponding coherence in policy planning and implementation, as critical elements for resource management not only of natural resources, but also of human resources.

COVID-19 RESPONSE PROGRAMMES

\$10K ONE-OFF Grant Available for Small Business: COVID-19 Support. The Government of Montserrat supported small and micro businesses needing support as a result of the COVID-19 pandemic, one time cash grants for up to EC\$ 10, 000. The announcement was made online on 29 May, 2020.

COVID-19 Social Benefit Support Programme: Provisions for first 3 months

The Government announced on their official website that it was discontinuing the Fiscal Support Scheme in August 2020. Income support provisions in particular were specified as being offered for 3 months at the onset.

According to a news release online on 23 April, 2020: The Government of Montserrat Department of Social Services, in the Ministry of Health and Social Services, with funds supplied by the Ministry of Finance and Economic Management (MoFEM), implemented a COVID-19 Benefit Support Programme which provided the following:

- Extension of the Meals on Wheels Service – This service is extended to include any identified person who would benefit from having a hot meal.
- Medication collection and delivery – The Social Services Department and the Montserrat Red Cross volunteers provided assistance to persons with the collection of their medication. Where possible the pharmacy will provide a 3-month supply.
- Red Cross Delivery service – Anyone can use this service. Persons can order groceries from the supermarket and the Red Cross will collect your money and deliver your shopping.

Support was also provided initially for 3 months to persons who were:

- Single low income earners (below \$900);
- Large family low income earners (\$1,800);
- Persons in quarantine that are unable to access food,
- Persons who lost their job/income after the March 27 lockdown, and
- Persons who were unemployed before the March 27 lock down (over 18 years) – regardless of nationality (specified as including self -employed, cleaners and construction workers, among others):

-Monthly Food Package – This assistance applied to persons who are low income earners, and persons who are in quarantine who are unable to access food. This will be offered for 3 months, in the first instance.

-Social Income Support/Unemployment Benefit (\$900.00) – Due to the shutdown, a number of persons are now unemployed and would need assistance.

In these cases, the Social Services Department will offer a basic income support or unemployment benefit of \$900.00 per month for the next three months, in the first instance.

Digital Nomad Programme or Digital Remote Working Programme

According to a press release dated 24 September 2020, The Ministry of Communication, Works, Energy & Labour received Cabinet's approval to implement a Digital Nomad Programme or Digital Remote Working programme. The programme will allow persons to travel to Montserrat and work remotely thereby contributing to Montserrat's economy, while at the same time completing their targets for their companies and organisations based overseas. This programme aligns well with one of the new exploratory directions of the Accelerator Lab in determining the role of digital nomads in the blue economy.

ECONOMIC AND DEVELOPMENT PRIORITIES

The National Economic Development Framework and Priorities policy document currently outlines government’s priority areas. The areas relating to the Blue Economy within the policy include:

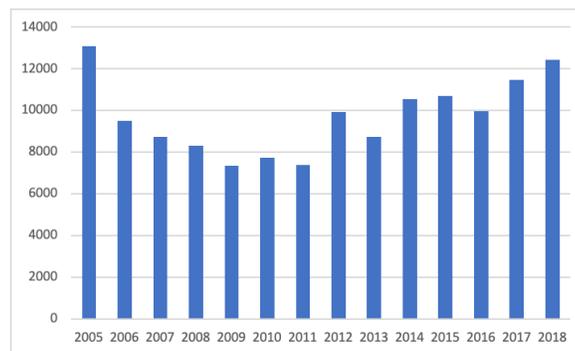
- Port development,
- Cruise and ferry stops,
- Ecotourism,
- Scuba diving activities, and
- The berthing of yachts.

Tourism is also highlighted as a major area for growth. The sector is estimated to represent 4%-5% of GDP and employs approximately 250 persons. Montserrat has a competitive advantage particularly for ecotourism given its pristine and unspoilt beaches. Therefore, coastal and marine tourism could be a driver to attaining Montserrat’s Tourism Master Plan target of increasing tourism’s value-added contribution of GDP to 9% by 2025 (Mott MacDonald 2018).

This goal is supported by growth in arrivals to the island prior to the COVID-19 pandemic with arrivals reaching 12,429 persons, the highest record since 2005 (Figure 5). Moreover, cruise arrivals increased by 59% from 4,294 passengers in 2018 to 6,821 passengers in 2019 (Figure 6). The GoM is committed to developing this segment of the sector with a focus on smaller cruise lines to sustainably manage the growth in this area (Ministry of Finance & Economic Management 2020).

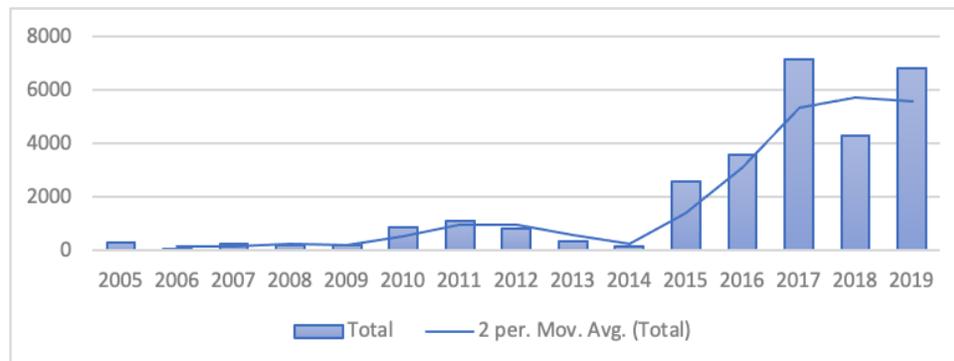


FIGURE 5: VISITOR ARRIVALS (2005-2018)



Source: (Statistical Department Montserrat 2020)

FIGURE 6: CRUISE SHIP ARRIVALS (2005-2019)



Source: (Statistical Department Montserrat 2020)

INVESTMENT CLIMATE

Treaties with investment provisions

As part of the Organisation of Eastern Caribbean States (OECS) and the Caribbean Community (CARICOM), Montserrat is signatory to several trade and investment treaties. Table 4 outlines the existing treaties which can be utilised by the GoM to facilitate blue trade and investment.

TABLE 4: MONTSERRAT INVESTMENT TREATIES

Treaty	Investment Provisions	Trade and Investment Opportunity
CARICOM – Costa Rica (2005)	General provisions to broaden and deepen relations. Further liberalisation of markets for investment.	The treaty makes provisions for investment which includes rights conferred by law or under contract, to undertake any economic and commercial activity, including rights to search for, cultivate, extract or exploit natural resources.
CARICOM – Cuba (2001)	To expand economic space for regional trade and investment and to gradually and progressively foster economic integration. The promotion, protection and facilitation of investments between parties through the development and adoption of an agreement on reciprocal promotion and protection of investments.	Duty free access on live and ornamental fish, fish - dried, salted, in brine or smoked, fish meal for human consumption, crustaceans, shrimp, prawns, conch, molluscs.
CARICOM – Dominican Republic (2002)	The creation of a Free Trade Area that includes Trade in Goods and Services, Investment and Economic Co-operation.	Goods subject to Most Favoured Nation Rate of Duty include fish fresh, chilled or frozen, crustaceans, molluscs.
CARICOM – United States (2013)	The recognition of the essential role of private investment, both domestic and foreign, in furthering growth, creating jobs, expanding trade, improving technology, and enhancing economic development.	Facilitation of trade and investment opportunities in (i) trade standards, including customs procedures and technical barriers to trade (ii) promotion of innovation and the dissemination of technology for increasing competitiveness, job creation, economic development, and trade and (iii) sanitary and phytosanitary measures.
CARICOM – Venezuela (1993)	Encourage the promotion and protection of investments by their nationals through the conclusion of bilateral investment treaties between the individual Member States of CARICOM and Venezuela.	Products from the CARICOM Exportable Offer with Duty Free Access - Fish Glue. Products from the CARICOM exportable offer subject to phased reduction - Fresh, chilled, frozen, dried, or smoked fish, crustaceans, molluscs, organic soap.
CARICOM Single Market	Establish and maintain a sound and stable macro-economic environment that is conducive to investment, including cross-border investments, and the competitive production of goods and services in the Community.	Council for Trade and Economic Development (COTED) - promote measures to achieve: (a) increased investment in services; (b) increased volume, value and range of trade in services within the Community and with third States (c) enhanced enterprise and infrastructural development, including that of micro and small service enterprises. Community Investment Policy which shall include sound national macro-economic policies, a harmonised system of investment incentives,
Free Trade Agreement Between the European Community and Overseas Countries and Territories	Developing economic relations between the OCTs and the European Union	Support for OCT actions aimed at encouraging and attracting private investment and joint venture operations; encourage higher levels of private sector investment; promotion of private investment in the OCTs' tourist industries; private sector investment support; OCT Investment Facility

Despite having access to numerous trade policy instruments, there is little evidence that Montserrat has utilised these provisions to boost 'blue' trade and investment. Also, based on the country's concentration on exportation of sand, trade and investment treaties have not been operationalised generally to the benefit of economic growth. To address the low rate of usage of investment treaties the GoM could establish a dedicated department or committee to streamline the processes and procedures related to FDI inflows and how to prioritise sustainable investment in coastal and marine economic activity.

Montserrat also has several other financing avenues for the growth and development of 'blue' activities including: private sector financing (both local and foreign direct investment with the diaspora being an untapped market), DFID, the Caribbean Development Bank (CDB), the Organisation of Eastern Caribbean States (OECS) and Caribbean Community and Common Market (CARICOM).

FOREIGN INVESTMENT

The GoM seeks to attract new private foreign investment as it builds out the economy of Montserrat particular in infrastructural development. Foreign investors are permitted to acquire real estate, subject to the acquisition of an Alien Land Holding license. Foreign investment in Montserrat is subject to the same taxation rules as local investment and is eligible for tax holidays and other incentives. Montserrat also has preferential trade agreements with the United States, Canada and Europe.

The government allows 100% foreign ownership of businesses, but the administration of public utilities remains wholly in the public sector (US Department of State 2014). Montserrat is one of the seven British Overseas Territories that has a financial centre (US Department of State 2014).

As of 2014 Montserrat was listed on the OECD's list of jurisdictions as being largely compliant in exchange of information on request (EOIR) rating meaning the island's EOIR standard is implemented to a large extent, but improvements are needed and some deficiencies identified are material but have limited impact on EOIR (OECD 2020).

IMPLICATIONS FOR BLUE GROWTH

Montserrat continues to receive little in terms of FDI when compared with other OECS countries (Groot and Ludeña 2014). Attracting sustainable financing for many areas in the Blue Economy will be key part of the enabling framework for BE activities. As a trillion-dollar industry worldwide and viewed as an area for growth among Caribbean countries, the BE is gaining more significance and attention, therefore there are opportunities for job creation and livelihoods.

The blue economy ecosystem presented below presents diverse options for exploration by the Government of Montserrat. At-a-glance, it is clear there is a need for specialised skills in many of the ocean services, as well as the need for human resources in general. The traditional areas of fishing and aquaculture would be the opportune choices for immediate development. Due to the ecological management requirements, for example fish stock management and in the case of aquaculture the production of organic waste, it is clear that effective blue economy development requires an enabling environment that is more complex to ensure ecological, economic and societal needs are met and managed.

TABLE 5: BLUE ECONOMY ECOSYSTEM

Type of activity	Ocean service	Industry	Drivers of growth
Harvesting of living resources	Seafood	Fisheries	Food security
		Aquaculture	Demand for protein
	Marine biotechnology	Pharmaceuticals, chemicals	Research and development for healthcare and industry
Extraction of nonliving resources, generation of new resources	Minerals	Seabed mining	Demand for minerals
	Energy	Oil and gas	Demand for alternative energy sources
		Renewables	
Freshwater	Desalination	Demand for freshwater	
Commerce and trade in and around the oceans	Transport and trade	Shipping	Growth in seaborne trade; international regulations
		Port infrastructure and services	
	Tourism and recreation	Tourism	Growth of global tourism
		Coastal development	Coastal urbanization Domestic regulations
Response to ocean health challenges	Ocean monitoring and surveillance	Technology research and industry	Research and industry in ocean technologies
	Carbon sequestration	Blue carbon	Growth in coastal and ocean protection and conservation activities
	Coastal protection	Habitat protection and restoration	
	Waste disposal	Assimilation of nutrients and wastes	



Profile of Marine Economic Activities in Montserrat



PROFILE OF MARINE ECONOMIC ACTIVITIES IN MONTSERRAT

At present Montserrat has four main blue economy sectors which can be classified as being under-utilised based on the level of activity and the capital investment.

The areas are:

1. Port facilities and operations
2. Marine transport
3. Fisheries
4. Marine based tourism

In each sector there is the opportunity for expansion through increased capacity which must be coupled with strategies to drive either, local consumption as in the case of fisheries, or external consumption in relation to port facilities and marine transportation.

PORT FACILITIES AND OPERATIONS

The GoM has embarked on the expansion of their Little Bay Port facility through the Montserrat Port Development Project as a key driver of the island's economy in the short to medium term. The expansion is financed by £21.4 million from the UK Caribbean Investment Fund (£14.4 million) and EU EDF 11 Programme (£7 million) for the first phase of the project.

The Port is viewed as an enabler of economic activity and the aim of the expansion is to increase the maritime access to the island to support the growth of the visitor economy as well as increasing the cargo shipment throughput. In the past cruise calls had to be cancelled due to bad weather costing the island potential revenues. The development of a safe harbour is to address the limited capacity and risks associated with an open harbour. The project includes - the construction of a new 130-meter jetty to improve cargo operations and the docking of smaller cruise vessels; a breakwater facility; sea dredging and marine structures.

The port will provide a safe harbour and accessibility for larger vessels, safely accommodating one 150 m long handy-size vessel at the main berth (Stantec Consulting International Ltd. 2019). The plans also include a designated secure anchorage area for the local fishing vessel fleet. Other physical development is expected around the area to include duty free shopping facilities, road and bridge works and commercial activities in housing, accommodation, rentals, taxi operation, vehicle rentals and businesses providing food and beverage services (Ministry of Finance & Economic Management 2020, Caribbean Development Bank 2020).

The Little Bay Port currently employs 45 persons and revenues since 2010 have increased by 81% to XCD3,240,979 in 2019. Cargo throughput (inbound and outbound cargo) has increased by over 600% during 2010-2019 with total cargo in 2010 weighing 61,444 tonnes and in 2019 throughput weighed 438,680 tonnes (Figure 8). Although cargo revenues and throughput have increased steadily in the last 10 years some reductions are anticipated due to the impact on travel and supply chains because of the COVID-19 pandemic. Given the disruption COVID-19 is expected to have on the travel industry and on global supply chains, the GoM can consider determining the efficacy of their pre-COVID-19 plans for the Little Bay Port expansion and a new strategy for a post-COVID-19 environment in the short term.

Key Challenges of the Port Expansion:

- The expansion is being financed with limited funding (£21 million) and therefore may fall short of the construction expenses when taking into account other factors e.g. Cost overruns, delays etc.
- The project may also be halted for unknown/external circumstances as the expansion has been in the planning stages for approximately 10 years.

FIGURE 7: PROPOSED PORT FACILITY AT LITTLE BAY



Key Opportunities for the Port Expansion:

The expanded infrastructure and activities of the Little Bay Port can act as a driver for further development in capital work programmes in surrounding areas (roads, bridges, housing etc.) and could be an avenue for private-public partnerships and investment.

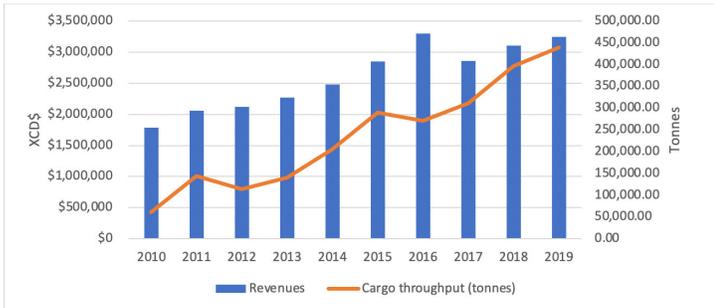
There is the opportunity to build a centre for commercial activity to support peripheral activities (food, entertainment, shopping etc.).

Expansion of the berth to increase cruise and yacht traffic which has spillover effects for the tourism industry -Inclusion of a heavy lift operations that can launch yachts from Montserrat.

MARITIME TRANSPORT

The overall development of marine transport in Montserrat is inextricably linked to the expansion plans for the Little Bay Port. Cruise arrivals on the island between 2005- 2014 were relatively flat averaging 439 arrivals during the period. In 2015 cruise arrivals increased by over 1000% to 2,591 compared to 184 arrivals in 2014. Since then cruise arrivals have been on an upward trend (Figure 9). In addition to the emphasis on cruise travel, the GoM has also identified ferry services as an area of future growth. Through the Access Strategy the government is committed to an owned ferry service. Passengers arrival by sea records also show an upward trend with arrivals by sea increasing year on year except for 2016. 2018 recorded the highest number of sea arrival passengers 12,877 persons (Figure 9). In the current environment, supply for ferry services outstrips demand, except for one or two peak periods during the year and this is anticipated to continue into the foreseeable future. The Ferry Service is not financially independent, with the GoM subsidising the service at a cost of XCD5.4 million (Aquila Aviation Ltd 2019).

FIGURE 8: LITTLE BAY PORT REVENUES AND CARGO



Source: Little Bay Port Authority

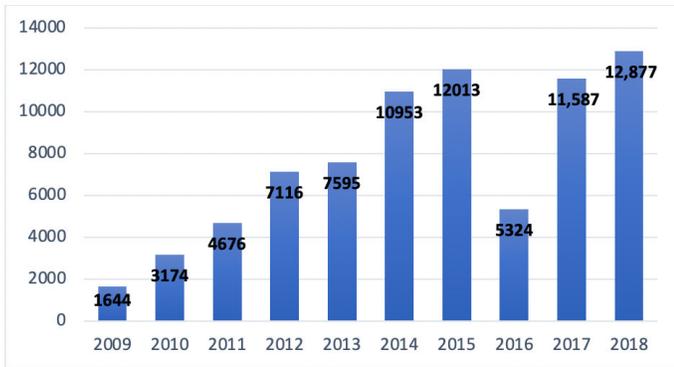
Key Challenges of Marine Transport:

- Existing limited harbour facilities,
- Limited access points for hauling up and launching of boats into the water,
- Lack of demand for ferry travel to support existing capacity, Limited variety of vessel types for marine transport,
- No clear strategy to encourage short stay visits from neighbouring islands to support the use of marine transport,
- Lack of access to maritime equipment on island to maintain boats.

Key Opportunities of Marine Transport:

- Increased capacity due to the expansion of Little Bay Port,
- Investment in new modes of marine transport enhance travelling experience and value added,
- Promotion of increased inter-island travel of citizens from neighbouring islands for ‘staycations’ and day trips.

FIGURE 9: PASSENGER ARRIVALS VIA SEA



Based on the Sea and Air Access Strategy to accommodate growth in demand and to diversify the marine transport options it is recommended that catamaran vessels of 25 ft or over be used for trips between Montserrat and Antigua and other close destinations such as Nevis or Guadeloupe.

FISHERIES

The fisheries sector in Montserrat is small and mainly based on artisanal fishing where 90% of the fishing activity occurs in the nearshore area, within three miles of the coast, while the remainder takes place outside of Montserrat’s territorial waters in nearby islands of Antigua, Nevis, and Redonda. Over 200 species of fish, other marine vertebrates, and invertebrates are landed in Montserrat’s fisheries (UC Santa Barbara 2015).

The sector contributes less than 0.5% of GDP, however actual contribution could be higher due to unreported activity and incomplete data. The sector comprises of 21 commercial vessels and employs approximately 50 persons. However, the number of persons involved in fisheries is estimated at 100 inclusive of those persons who fish occasionally. Fishers in Montserrat are all male with 40% being full time and 40% part time fishers, the other 20% noted they fish occasionally. The average age of a boat owner is age 52. Three main groups of fish species are harvested in the sector: reef, coastal pelagic and ocean pelagic. In 2016 reef fish constituted 51% of fish hauled and coastal and ocean pelagic 46% and 3% respectively (Dickie, et al. 2019).

Fish catch data for 2019 followed a similar trend with reef fish representing 58% of the total catch, coastal pelagic 34% and ocean pelagic 8%. The average market prices for reef and ocean pelagic are XCD 22.00 per kg or XCD 10.00 per lb for and XCD 17.60 per kg or XCD 8 per lb for coastal pelagic species. The valuation of the fisheries sector varies widely and depends on the methodology and assumptions utilised by researchers. Coiro (2017) estimated the gross and net value added of the fishing sector was XCD 229,476 (USD 84,991) and XCD 174,906 (USD 64,780), respectively. In addition, Dickie, et al. (2019) found the annual value of fisheries both commercial and subsistence was XCD 1.7 million based on weekly fish catches (Table 6).

Based on the statistics of Montserrat, fish imports amount to 70% of local fish demand. Fish catch data highlights there is scope for the expansion of coastal and ocean pelagic fisheries and other value-added processes for further downstream activities. At present, Montserrat imports large quantities of frozen, dried, processed, and canned fish every year. Therefore, there is the opportunity to increase the contribution of local fisheries in supplying the local market and possibly exportation of some species (Coiro 2017). Highly valuable species include longjaw squirrelfish (*Holocentrus marianus*), ballyhoo (*Hemiramphus brasiliensis*), red hind (*Epinephelus guttatus*), northern red snapper (*Lutjanus campechanus*), and jacks and scad (*Carangidae*).

Lobsters are the most valuable catch in terms of unit price (price per kilogram), but landings of lobsters are very low because there is no directed lobster fishery (UC Santa Barbara 2015). Other ocean harvesting activities also includes the capture and sale of critically endangered hawksbill turtle. During 1994-2012, total landings of turtles were reported at 710.79 kg made up 80% of the catch, while 13% was green sea turtles. The average reported unit price over that time period was XCD 5.50. Other endangered species found in Montserrat’s waters include humpback and sperm whales during their migrations (UC Santa Barbara 2015).

TABLE 6 : TOTAL ANNUAL VALUE OF FISHERIES (2018)

	Sold on Market	Subsistence
Catch per week (lbs)	3,680	600
Catch per year (lbs)	143,350	23,390
Total volume of fish (lbs/year)	166,920	
XCD/week	\$39,560	\$6,432
XCD/year	\$1,536,712 ⁹	\$250,740
Total annual value of fisheries (XCD)	\$1,787,452	

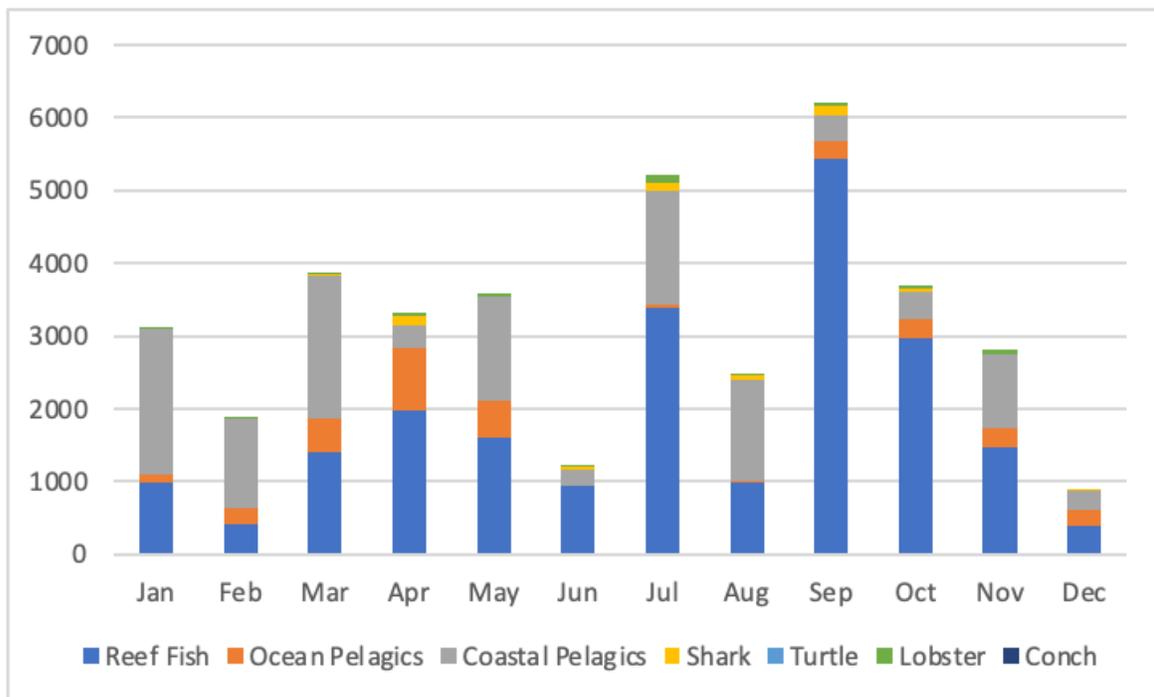
Key Challenges in Fisheries:

- Lack of a dedicated berth for local fishing vessels,
- There are limited access points for hauling and launching of vessels,
- Absence of a maritime equipment store on island makes it difficult for routine maintenance of boats,
- At present Montserrat does not have a sustainable fisheries management policy to direct and manage the activities of the industry or an updated fisheries management plan,
- There is no dedicated fish market for the preparation and sale of locally caught fish,
- The absence of freezer and cold storage facilities to support long line and ice boat fishing,
- Defunct Montserrat Fisherman’s Cooperative,
- Limited human and financial resources for management.

Key Opportunities for Fisheries:

- Revival or merger of the Montserrat fishers’ cooperative with the Montserrat Fishing and Boaters Association to capitalise on human resources and the pooling of finances,
- Increased catch of coastal and oceanic pelagic species,
- Introduction of training and technology to attract the youth into the sector,
- Fish farming and possible exportation of high value fishery e.g. tuna, diamondback squid.
- Development of specialty bi-products to increase value added.

FIGURE 10 : 2019 FISH LANDINGS PER SPECIES (LBS)



MARINE-BASED TOURISM

Prior to the eruption of the volcano, tourism accounted for 20- 36% of Montserrat's annual GDP, and Montserrat was well-known as a high-end travel destination, however tourism now accounts for less than 5% of GDP. Most of the island's tourism is based on terrestrial activities particularly visiting the Soufriere Hills volcano. The focus on terrestrial activities has resulted in the underdevelopment of marine based tourism.

Areas of development include the island's 16 dive sites, including 10 permanently moored sites. Due to marine based activities being a small component the reason for short-stay visitor travel, disaggregated data for marine based tourism is not available. In an exit survey, visitors were asked to rate tourism activities and tourism services on a scale of 1-5. Volcano watching received the highest rating (4.2 – very good) whilst diving and snorkelling was the lowest (3.8 – good).

This suggests there is room for improvement and development in the product and services being offered to tourists in the marine environment. Also, the lack of data and information on dive sites' carrying capacities or mapping of dive sites and reefs limits the ability to further develop marine based tourism enterprises. The most frequently used dive sites are Rendezvous Bay and Pot of Gold and sites in the north and east are subject to rough conditions, while sites in the southwest have poor visibility. Montserrat's dive sites offer attractions such as large barrel sponges and schools of chromis, damselfish, and wrasses (UC Santa Barbara 2015). In addition to diving Montserrat has a variety of snorkelling sites, including Bunkum Bay, Rendezvous Bay, Old Road Bay, Woodlands Bay, Carr's Bay, and Little Bay. Other water-based activities include kayaking, boat tours, and yachting.

There are seven beaches that are currently used by locals and visitors for recreation, including swimming, snorkelling, fishing and spearfishing, and beach events. Those beaches are: Rendezvous Beach, Little Bay, Carr's Bay, Bunkum Beach, Woodlands Beach, Lime Kiln Beach, and Old Road/Fox's Bay (UC Santa Barbara 2015). The natural attractions characterised by pristine beaches and numerous underwater dive sites can be managed sustainably to increase the tourism product offering and provide avenues for new economic activity.

In addition, research tourism can also be explored to ensure marine ecosystem health is monitored and regulated to support marine based tourism. Leveraging programs such as the Blue Belt Program can act as catalyst to support investment into research and monitoring of Montserrat's marine environment to support marine related tourism activities.

Key Challenges of Marine-based Tourism:

- The uncertainty of the COVID-19 pandemic and its implications for travel
- Limited access to the island via air and seaports
- Lack of a marketing strategy for the island's marine attractions
- Limited accommodation for increased visitors to the island

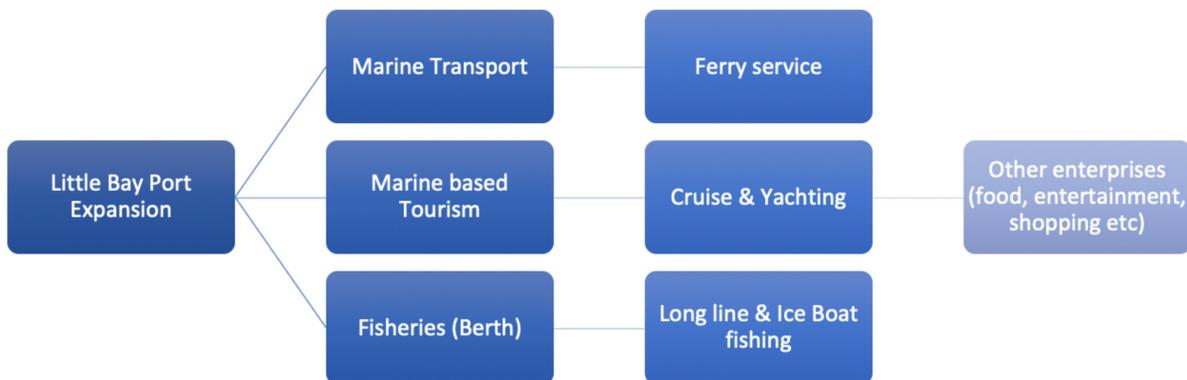
Key Opportunities for Marine-based Tourism:

- Increased niche tourism in the yachting market,
- Increased niche tourism product for underwater tours and experiences,
- Encourage the use of certifications such as the Oceanic
- Standard and Blue Flag to promote sustainable practices and branding,
- Merging research tourism activities (scientific monitoring and surveillance) to support marine-based tourism,
- Offerings of an all-inclusive eco-tourism product leveraging the unique terrestrial sites to include marine based activities that are community driven.

The Little Bay Port expansion is an investment project which can be a major driver for other blue economic activities (marine transport, tourism and fisheries).

The interconnected relationship between the Port expansion and key industries in the marine environment and their expansion and diversification highlights the opportunity for the Little Bay Port to be a physical centre of not only increased economic activity but a Blue Hub to operationalise the sustainable use of Montserrat’s ocean resources for economic growth, improved livelihoods, jobs while preserving the health of ocean ecosystem and fostering community development.

FIGURE 11 : SCHEMATIC OF FUTURE BLUE ECONOMIC ACTIVITIES



The vision for the Blue Hub is described in more detail in the final section of this report: Recommendations and Next Steps.

PROFILE OF MARINE ECONOMIC ACTIVITIES IN MONTSERRAT

As mentioned earlier, there are four main areas of economic activity occurring in Montserrat’s marine environment – port operations, marine transport, marine based tourism and fisheries.

Based on stakeholder consultations there are areas of which can be developed in the future to not only provide jobs and income to residents but protect the ocean’s health and it’s resources.

The potential areas of economic activity include:

1. Mariculture of high value species (e.g. dolphinfish)
2. Exploitation of non-living resources (minerals)
3. Marine based renewable energy (ocean thermal energy conversion)
4. Ocean health preservation and ecosystem services (marine biologist/scientist, lifeguards, etc.)
5. Research tourism

The Blue Economy can be assessed using three tiers:

1st tier indicators are the main indicators used to identify the magnitude of blue economy’s impact in terms of Gross Value Added (GVA) and employment.

2nd tier indicators may complement 1st tier indicators in cases of limited data availability or if further evidence is deemed necessary for assessing the economic/social impact in terms of turnover, revenue, investment, number of enterprises, and average wages per person employed.

3rd tier indicators may be used to provide an estimate of labour market quality characteristics in the maritime sectors concerned, or to provide a more complete picture of the size and significance of the maritime sectors within the labour market (Charalambous 2016).

Table 8 on the next page outlines the Montserrat’s Blue Economy existing and future sectors. At present there is limited data on the 1st tier data – GVA and employment level in each sector and therefore a valuation of the blue economy sectors in Montserrat cannot be estimated.

Investment & Financing Opportunities

Mobilise Diaspora Investment

Montserrat has a large diaspora community with two-thirds of its citizens living abroad, primarily in the United Kingdom. The thousands of Montserratians living overseas can act as a financing mechanism to support local blue economy businesses and projects, through the development of incentives and investment products for those in the diaspora who want to contribute to the island’s development and participate in productive philanthropic activities. At present there is no data regarding the estimated value of capital and wealth of the diaspora and the value for personal remittances is also unknown. The GoM is in the initial phase of creating a diaspora databank which will identify Montserratians living abroad, their skills set and creating opportunities for these persons to invest in Montserrat.

Local Financial Sector

Montserrat has the smallest financial sector of the six British Overseas Territories and, except for banking services, it has the least offshore activity of any of these territories. There are two commercial banks on island, Bank of Montserrat Limited and Royal Bank of Canada. There is also a credit union on the island, St. Patrick’s Co-operative Credit Union Limited which has a membership of 5,392 persons, total deposits of XCD 51,749,874 (approx. 30% of GDP) and an asset base of XCD57,860,025 (Caribbean Confederation of Credit Unions 2020). The local financial sector although small, has adequate resources (Table 7) to support BE entrepreneurial activities and small businesses through pitch competitions, the development of business plans and seed funding. Financing these new areas will require increased awareness and knowledge about the BE and for management and decision makers in traditional financing to understand the benefits of leveraging their liquidity towards triple bottom line (profit, environment, social) business ventures.

TABLE 7 : KEY FINANCIAL STATISTICS

	DEC 2018	MAR 2019	JUN 2019	SEP 2019	DEC 2019
KEY BALANCE SHEET ITEMS (IN EC\$M)					
TOTAL ASSETS	\$ 461.07	\$ 443.66	\$ 450.20	\$ 448.76	\$ 459.77
TOTAL LOANS AND ADVANCES	\$ 103.95	\$ 104.49	\$ 104.68	\$ 104.64	\$ 105.32
PRIVATE SECTOR CREDIT	\$ 88.17	\$ 87.92	\$ 87.97	\$ 86.44	\$ 86.71
TOTAL DEPOSITS	\$ 358.11	\$ 340.94	\$ 347.57	\$ 347.97	\$ 356.13
LIQUID ASSETS TO TOTAL ASSETS (%)	73.32	72.17	72.62	72.10	71.27

(Eastern Caribbean Central Bank 2020)

TABLE 8 : MONTERRAT BLUE ECONOMY PROFILE FOR EXISTING AND FUTURE SECTORS

Activity	Existing/Future Sector	Economic Value	Employment	Environmental Impact	Social Impact
Port Facilities	Existing with plans of expansion	Imports XCD\$113 million (2014) Exports XCD \$9 million (2014) Revenues XCD\$3.2 million (2019)	45	Unknown	Creation of jobs
Marine based tourism	Existing (minimal)	Passenger arrivals via sea 12,877 (2018)	Unknown	Minimal at present, need for greater management if tourism industry is expanded	Unknown
Marine Transport	Existing (room for enhanced capacity)	Unknown Subsidized XCD\$5.4 million	Unknown	Unknown	Greater connectivity with neighbouring islands
Capture Fisheries	Existing (room for enhanced activity)	Gross XCD\$229,476 Net XCD\$174,906 XCD \$1.7 million	50-100	Overfishing of reef fish	Provision of livelihoods and support for families Source of supplementary income
Mariculture (high value species)	Future	Unknown	Unknown	Unknown	Creation of jobs
Seabed mining for minerals	Future	Unknown	Unknown	Sediment plume destroying marine life	Unknown
Marine based RE	Future	Unknown	Unknown	Reduced CO ₂ footprint	Unknown
Ocean health preservation and Ecosystem Services	Future but small projects at present	Unknown	Unknown	Enhanced marine biodiversity and ecosystems	Improved community well-being
Research tourism	Future	Unknown	Unknown	Enhanced marine biodiversity and ecosystems	Greater collaboration at the community level with regional and international organisations

PROFILE OF MARINE ECONOMIC ACTIVITIES IN MONTSERRAT

INVESTMENT & FINANCIAL OPPORTUNITIES

Local Cooperatives

The creation of local cooperatives can act as financial opportunity for community-based organisations and various groups to pool local resources and build equity within the BE. The revitalisation of the Montserrat Fisher’s Cooperative could be a catalytic project whereby existing and potential fishers can combine their financial resources to fund upgrades to their fleet and provide capital to purchase technology to enhance the efficiency of their operations. It can also attract monies from sources outside of those working directly in the industry who have excess funds which they want to invest. This may be an opportunity for females to be involved in the sector, not in traditional roles, but as financial investors.

Foreign Direct Investment

Montserrat is yet to capitalise on the amount of FDI it could attract to the island. Foreign direct investment is extremely important for the Caribbean and the ratio of FDI inflows to GDP is around 7%, with many countries above 10% (Groot and Ludeña 2014). However, Montserrat has yet to benefit from direct investment whether through equity or investment funds or debt instruments in enterprises. In contrast, other OECS countries benefit from direct investment. It should be noted that Anguilla, another British OT received XCD 4.5 billion in direct investment and can be an example for Montserrat. Table 9 outlines the amount of direct investment OECS countries received in 2018.

TABLE 9 : OECS DIRECT INVESTMENT IN 2018 (XCD \$M)

Country	2018
Anguilla	\$ 4, 545.16
Antigua	\$ 4, 867.85
Dominica	\$ 4.44
Grenada	\$ 244.35
Montserrat	\$ -
St. Kitts and Nevis	\$ 156.97
St. Lucia	\$ 1, 547.04
St. Vincent and the Grenadines	\$ 238.10

Blended Finance

Montserrat due to its unique position of having OT status in addition to being a full member of CARICOM and OECS has the opportunity to take advantage of blended finance to support coastal and marine preservation and restoration projects. Blended finance is the strategic use of development finance for the mobilisation of additional finance towards sustainable development in developing countries (OECD 2020). Blended finance using development financing and philanthropic donations from the diaspora and UK citizens could finance national scale marine and coastal ecosystem projects which increase the countries natural capital and in turn supports livelihoods and social well-being. Also, given Montserrat benefits from technical assistance from the UK the GoM can work with UK technocrats to develop a policy framework to guide this type of financing to cater to the local context.

Parametric Insurance

Montserrat can consider innovative climate risk insurance mechanisms to promote food security; livelihoods of fisherfolk; resilient fisheries; sustainable management of coastal infrastructure; and disaster risk reduction.

A Caribbean example is the Caribbean Catastrophe Risk Insurance Facility Segregated Portfolio Company (CCRIF SPC) and the World Bank’s Caribbean Oceans and Aquaculture Sustainability FaciliTy (COAST) fisheries parametric insurance which has been piloted in Grenada and Saint Lucia. The COAST insurance policy provides coverage for fisherfolk and other players in the fisheries industry to enable them to recover quickly after weather-related events.

Summary

Montserrat due to its unique position as a British OT, as well as a a full member of CARICOM and the OECS, has a variety of investment and financial opportunities at its disposal. The investment and financial opportunities proposed above offer short and medium-term instruments that can support businesses and activities of Montserrat’s Blue Economy. These opportunities can be implemented through public-private partnerships and championed by the Minister of Finance and Economic Management in collaboration with the Minister of MAHLE.

PROFILE OF MARINE ECONOMIC ACTIVITIES IN MONTSERRAT BARRIERS TO GROWTH AND RECOMMENDATIONS

Under-utilised local capital

Montserrat's local financial institutions have adequate resources which can be mobilised to finance small and medium BE enterprises. However, the financial instruments, avenues and technical acumen related to BE businesses are minimal and/or absent and therefore presents a challenge for local entrepreneurs to access the liquidity which exists to fund their business ideas.

Lack of technical capacity and skilled human resources for the BE

Establishing blue enterprises and embarking on coastal and marine ecosystem protection and regenerative projects will require technical expertise and skill sets (aquatic skills - swimming, diving etc. and maritime skills - boat handling, navigation, the use of ropes, wires and chains, anchoring, mooring and securing a vessel) which currently do not exist at scale within Montserrat. This lack of knowledge and skills base acts as a barrier to building out Montserrat's BE.

Absence of an investment and promotion agency

At present, there is little information online on how foreign investors can invest in Montserrat and what business opportunities exist on island which have the potential for a return on investment. A clear strategy for attracting investment can be considered, since BE opportunities will have not only economic returns, but environmental and social return as well. Montserrat can also consider establishing an investment and promotion agency to take advantage of future FDI in general, and more specifically for the BE.

Lack of coordination plan between the Little Bay Port infrastructural project and tourism marketing strategy

The current Little Bay Port expansion is intended to increase the number of cruise and yacht visitors that visit the island every year. A clear mandate and strategy on how niche markets will be targeted and along with using the infrastructure of the Little Bay Port as a value-added service is needed. The infrastructure of the Port can be used, not only as an enabler to economic activity in the tourism, but as experiential service highlighting the country's marine and cultural heritage. Amenities such as a maritime museum and community centre can enhance offerings of the Port.

Absence of dedicated fisheries complex

Since fisheries is one of the main existing sectors within the BE, its modernisation, growth and development is tied to the access to enabling infrastructure. As one of the areas which can be considered 'low hanging' fruit, the lack of a dedicated fisheries complex will hinder any efforts to modernise and grow the industry. Increased fisheries activities will require refrigeration and storage facilities and handling equipment which satisfies Sanitary and Phytosanitary regulations.

RECOMMENDATIONS

The development of a Blue Economy strategy which identifies short, medium and long term economic activities within the coastal and marine areas of Montserrat.

This strategy can include all existing and future blue economic activities along with a plan for monitoring and data collection to measure Montserrat's 'Blue Growth' including gross value added, the number of persons employed and the social and environmental costs or value incurred by way of the activities.

The establishment of a national investment and promotion agency.

This agency could act as a one stop shop for investors and philanthropists on how they can invest and/or donate towards sustainable productive activities in the Blue Economy. The agency can also act as a partnering organisation with local financial institutions to responsibly utilise the liquidity in the banking sector for small and medium sized business opportunities. The overall role of the agency would be to act as an enabling organisation pairing projects and businesses with the appropriate financing mechanisms.

The creation of a sustainable tourism development plan for the Little Bay Port and its surrounding environs.

This plan would include activities which would further enhance the tourism product of the Little Port e.g., marine museum, community exhibition centre, signage etc. by highlighting the island's heritage and culture while aiming to increase the average spend of passenger via sea travel.

Enhance and increase the value of the fisheries sector.

The fisheries sector is one of the main economic activities which occur in the blue economy environment. Since it is an established, mature sector with potential for increased activity investment into its modernisation and transformation could result in increased value and employment opportunities in the near term. The utilisation of CCRIF COAST could increase the resilience of the sector and provide parametric insurance at a scale relevant to vulnerable fishing communities. In addition, the establishment of dedicated fisheries facility is a key factor and enabling infrastructural project needed for the sector's growth and sustainable development.



Social-economic Context

Main findings: Social and Economic Considerations

Human Resources and Blue Growth

*Montserrat Port Development Project: Suggested Case Study for
informing Blue Growth*

Blue Economy Development and the Social Solidarity Economy

The Montserrat Social and Economic Policy and Planning Landscape:

Considerations for Equitable Blue Growth for Women and Men

Summary Findings of Social and Economic Considerations



MAIN FINDINGS SOCIAL AND ECONOMIC CONSIDERATIONS

INTRODUCTION

Of note, before reading the main findings in the following pages, is that overall Montserrat is a peaceful country, with limited poverty, limited crime and violence and limited unemployment. However, there are structural development issues that should be considered for economic development so that they are not exacerbated and that negative trends are not amplified.

These findings are to be regarded as indicative of areas to address moving forward, and not as representing a social and economic environment that is fraught with deprivation. Rather the goal is to 'leave no one' behind and address what can be manageable challenges now, to avoid them becoming bigger challenges in the future.

These findings are based on data gathered from many well reputed documents and sources including the Government of Montserrat inclusive of the Statistics Department and development partners working with the Government. The data sources include but are not limited to the Economic Growth Strategy and Development Plan for Montserrat 2018, the Montserrat Labour force Census 2018, the COVID-19 Business Impact Assessment for Montserrat, the Draft Report of the Montserrat Port Development Project Environmental and Social Impact Assessment (ESIA) prepared by Stantec Consulting International Ltd. for the Government of Montserrat, the Country Gender Assessment conducted by the Caribbean Development Bank and the Caribbean Development Bank Draft Final Report Montserrat Survey of Living Conditions Volume 1. Main Report July 2011.

Following on the above, this socio-economic and policy overview is as comprehensive as possible in highlighting the main areas for consideration to support equitable and gender responsive blue economy development.

Further and of note, is that the analysis and approach address the achievement of key Sustainable Development Goals including but not limited to SDG 5 related to the achievement of Gender Equality and the Empowerment of Women and Girls, SDG 8 related to Decent Work and Economic Growth: Promote Sustained, Inclusive and Sustainable Economic Growth, specifically, for Full and Productive Employment and Decent Work and SDG 16 for the development of Peace, Justice and Strong Institutions.

HUMAN RESOURCES AND BLUE GROWTH

Income Poverty, Employment and Economic Expansion

As previously noted, the island of Montserrat has a history of vulnerability to volcanic eruptions that have disrupted its social and economic development. As a result, the population of Montserrat has been fluid with implications for the development of economic sectors in general, specifically related to the fluidity of the available work force. The 1997 eruption saw two thirds of the 12,000 people living on the island leave (Office of Premier 2020), with several parts of the island remaining uninhabitable today, but according to key stakeholder interviews undertaken for this rapid assessment, some closed areas are being looked at for opening and infrastructure development now. Data for 2019 show a total population of 4, 519 people, 2,272 females and 2,247 males (GoM 2018).

At the time of writing this report, available data on poverty via desk review was limited, and relies on the Government of Montserrat and the Caribbean Development Bank Draft Final Report Montserrat Survey of Living Conditions Volume 1. Main Report July 2011. The draft report notes that whilst there are more non poor than poor persons in Montserrat, it does not mean that there are not development challenges to be addressed.

Notable findings on poverty include but are not limited to:

- There were higher rates of poverty among non-nationals than nationals.
- Larger households are much more likely to be poor and they account for a disproportionate proportion of poor households.
- Specifically, households with more than 2 persons account for over 60% of poor households compared with 34% of all households; the poverty rate amongst this group is around 45%, almost double the national average. The poverty rate for single person households [was] 11% in contrast. Over 80% of the poor population lives in households with more than 2 persons.
- The average household size of poor households is 3.5 persons compared with 2.1 persons for not poor households.

The poverty rate is almost double amongst households headed by persons with only primary education compared to those headed by persons with some secondary, vocational or university education.

Children under 15 years of age experienced the highest levels of poverty – at the time this comprised over one third of the income poor population.

Around half of poor households are headed by persons with only primary education (they note however that there are more non poor than poor households in every education group).

Whilst typically the majority of the working age population in Montserrat is employed, in light of the COVID-19 pandemic, the job market has contracted and will have implications for persons with reduced incomes.

Based on the data obtained some key issues are identified when thinking about poverty mitigation, include that where poverty exists:

Households vulnerable to income poverty have a large burden of care, and would require relevant education and household care supports to be able to participate adequately in the job market

Education and income poverty are linked

Immigrant and non-national populations are disproportionately vulnerable to income poverty

As Montserrat has been dependent on low skilled immigrant labour, appropriate provisions for them need to be made including being paid a living wage/provided access to decent work

Any growth and development strategy and planning should also include poverty reduction goals which address access to education and decent work (living wage and social services benefits) as key areas of attention. It should include current research into the reasons for unemployment among females and males, and note whether the unemployed are accessing social services, including attention to male and female youth unemployment and access to decent work of female and male migrant populations.

Labour, Employment and Education in Montserrat

The Economic Growth Strategy and Development Plan for Montserrat 2018 notes low population levels, low education attainment, skills and capacity gaps and increasing demand for technical specialists as hindering economic development and growth. It also highlighted the need for relevant training and noted that young skilled workers tend to leave the island (brain drain) seeking better paying jobs elsewhere, unless incentivised to stay, for example through the offer of training as a way to make them more competitive and better able to access a ‘well paid job’. Specifically, statistics from the Department of Statistics of Montserrat (up to 2018/2019) shows that:

- According to the Labour Force Census 2018, in the population aged 20 years 572 males and 504 females had completed secondary school in 2018.
- In 2018, 21% of the population had completed university level education, with 399 females (24.1%) and 262 males (16.7%).
- At the end of 2018, there were 21 males and 35 females enrolled in the tertiary education institution on island, with a total of 56 persons enrolled in tertiary education.
- The working age population (WAP – ages 15-64) in Montserrat was 3025 people or 66% of the total population, with 1479 (66%) males and 1546 (67%) females.
- The labour force (employed and those seeking work) in 2018 was 2703 people with 1348 males and 1355 females.
- The Labour Force Participation Rate for 2018 was 89.4%, with 83% of the working age population employed.
- Employment in 2018 was 2527 people, with 1251 males and 1276 females employed.
- Unemployment in 2018 was 176 people, with 79 females and 97 males unemployed.

- The total unemployment rate was 6.6% in 2018, 7.2% among males and 5.8% among females.
- Youth unemployment, 11.8% in 2018, was higher for females at 14.1% than for males at 9.9%.
- Caribbean Secondary Education Certificate (CSEC) enrollment and performance from 2015 – 2019, shows the highest enrollments are in English A, Mathematics, Agricultural Science, Integrated Science, Biology, Geography, Social Studies, Electronic Document Preparation and Management (EDPM), Information Technology and Principles of Business (used enrollment of 10 persons and over as criteria).

Labour Force and Migrant Worker Linkages

- A characteristic of the island’s current population is the relatively large numbers of non-nationals.
- Data on citizenship for 2018 shows people born in Montserrat as comprising 56.12% of the population, compared to 61.1% in 2011 and a general increase in immigration to the Small Island Developing State (SID) primarily from neighbouring islands. According to the Country Gender Assessment 2015, the types of labour performed by immigrants, using data on work permit holders, “between 2012 and 2013, were predominantly low-skilled male labourers followed by female domestic workers.

Industry, Occupation and Labour in Montserrat

The current labour market broken down by industry group and corresponding males and females employed can be seen in the corresponding table. The industry breakdown shows there is limited blue economy activity, relegated to the industry groups of Agriculture, Hunting, Forestry & Fishing, Electricity, Gas, Water Supply.

Further, even if there were blue economy activities being undertaken for example in the Electricity, Gas and Water supply industry group, this employed only 3% of the labour force at the time of data collection. Of further note is the limited labour force in general of 2,527 people in total as noted above from the 2018 labour force data. Recent stakeholder discussion puts that figure at around 2000 people.

TABLE 10 : EMPLOYMENT BY INDUSTRY GROUP

Industry Group	2018		2011	
	Frequency	%	Frequency	%
Agriculture, Hunting, Forestry & Fishing	114	5	58	2.2
Mining & Quarrying	40	2	29	1.1
Manufacturing	42	2	102	3.9
Electricity Gas Water Supply	79	3	77	2.9
Construction	243	10	388	14.9
Wholesale & Retail Trade	286	11	292	11.2
Hotels & Restaurants	145	6	109	4.2
Transport Storage and Communication	145	6	179	6.9
Financial Intermediation	86	3	69	2.6
Real Estate Renting & Business Activities	72	3	86	3.3
Public Administration & Defense				
Compulsory Social Security	617	24	649	24.9
Education	164	6	132	5.1
Health & Social Work	209	8	221	8.5
Other Community Social and Personal Service Activities	144	6	73	2.8
Activities of Private households as employers of Undifferentiated	110	4	138	5.3
Not Stated/Don't Know	31	1	4	0.2
Total	2,527	100	2,606	100

Source: Montserrat Statistics Department, Population and Housing Census May 2011, Labour Force Census September 2018

Economic growth and Occupational Sex Segregation

The Economic Growth Strategy and Delivery Plan for Montserrat 2018 (GoM 2018) priority sectors identified for growth in the were sand mining, agriculture, financial services and power generation. Of note is that these priority sectors are male dominated with the exception of financial services. Whilst women have made strides in accessing increased positions in management for example, there is still a clear overrepresentation of women in fields that require contact with people (care economy), and overrepresentation of men in fields where there is work with machines or work that is reliant on handling larger scale equipment. This has implications for women’s access to current (fisheries for example) and emerging blue economy jobs.

The corresponding table shows that there were more males than females in almost every occupational category, with the exception of Managers (notably only an increase of 10 people between women and men, with management professions seen as part of the care economy and part of the traditional gender stereotype of women’s work), Service and Sales Workers (in keeping with traditional gender stereotypes regarding women’s work) and Elementary Occupations.

Preliminary findings of the Caribbean Fisheries Gender Scoping Report (which included Montserrat) notes that “Like other small-scale fisheries throughout the world, gender roles in the Caribbean fisheries are established along the lines that recognise most of the activities, rights and responsibilities of men. There is an absence of data and documentation on women’s roles and the value of these roles to the entire value chain. Generally, where women are well known or recognised is in the post harvest part of the value chain”(CERMES 2018).

As can be seen in table 12, this translates to sex segregation according to industry. For example, construction as an industry typically employs more males than females. Noting the intersection between occupation and industry, even when there are shifts, often persons remain in stereotypical occupations within the non- traditional industry.

Of note is the burden of care placed on women as they are expected to carry out traditional gender roles, caring for children and other family dependents in addition to participating in the labour force. This may also contribute to the choice of traditional work. The 2018 Labour Force Census shows that 41% of households were headed by females increased from 38% in 2011.

Notably, there are some provisions for creating an enabling work environment for women including the presence of day care services. The statistics Department of Montserrat reports an increase in day care centres from 1 in 1998 to 6 in 2018, for a total of 93 children accessing care, 48 boys and 45 girls (GoM 2019).

TABLE 11 : OCCUPATION BY SEX OF PERSON

Occupation	Sex of Person				Total	%
	Male	%	Female	%		
Managers	137	11.0	147	11.5	284	11.2
Professionals	97	7.8	204	16.0	301	11.9
Technicians & Associate Professionals	169	13.5	106	8.3	275	10.9
Clerical Support Workers	44	3.5	224	17.6	268	10.6
Service And Sales Workers	179	14.3	380	29.8	559	22.1
Skilled Agricultural Forestry & Fishery	97	7.8	10	0.8	107	4.2
Craft & Related Trade Workers	272	21.7	23	1.8	295	11.7
Plant & Machinery Operators &	111	8.9	2	0.2	113	4.5
Elementary Occupations	142	11.4	177	13.9	319	12.6
Armed Forces	1	0.1	0	0.0	1	0.0
Not Stated	2	0.2	3	0.2	5	0.2
Total	1251	100	1276	100	2527	100

Source - Labour Force Survey and Intercensal Count - 2018

TABLE 12 : INDUSTRY BY SEX OF PERSON

Industry	Sex of Person		Total
	Male	Female	
	2	1	3
Agriculture Hunting & Forestry	84	10	94
Fishing	19	1	20
Mining & Quarrying	35	5	40
Manufacturing	23	19	42
Electricity, Gas, Water Supply	55	24	79
Construction	239	4	243
Wholesale & Retail Trade	133	153	286
Hotels & Restaurants	30	115	145
Transport Storage and Communication	86	59	145
Financial Intermediation	20	66	86
Realestate, Renting & Business Activities	42	30	72
Public Administration & Defence Compulsary Social Security	305	312	617
Education	34	130	164
Health & Social Work	30	179	209
Other Community Social and Personal Service Activities	76	68	144
Activities of Private households as employers of Undifferent	21	89	110
Not Stated/Not Applicable/Dont know	17	11	28
Total	1251	1276	2527

Source: Intercensal Count and Labour Force Census, September 2018

Blue Growth and Decent Work: Addressing Informality

Following on the issue of occupational sex segregation is the question of decent work, and the need to ensure that blue growth is equitable and does not increase inequalities and vulnerability to poverty. Central to this is the issue of informal economy and informal employment. Stakeholder discussions noted the challenge of informal employment in Montserrat, the inability to address it, and the implications for social protection systems.

As Montserrat has an aging population, the need for adequate resources to support elderly persons is critical. As well, the implications for increased informality with blue economy developments as blue sectors such as fishing and tourism tend to have high rates of informal employment.

The COVID-19 Business Impact Assessment for Montserrat highlighted that 62% of the business included in their report were registered, and 33% being recognised as either sole traders or self-employed, concluding that there is a high level of informality in the business sector. The report noted that “The informality is suggestive that many businesses are not registered with the appropriate entities and there is a general lack of compliance with business regulations.

The lack of formality was most noticeable in the agricultural, tourism and construction industries.”(Office of the Premier, 2020).

It is not clear what are the male and what are the female owned businesses of those registered and unregistered businesses participating in the assessment.

Informality is a concern for blue economic development, as it leaves large numbers of the population without social protection, increasing their vulnerability to socio-economic shocks. The COVID-19 pandemic is a prime example of why investing in social protection and addressing informality in business is critical to building resilience and mitigating the impacts of the same.

The Relationship between Education, Employment and Economic Development

Coupled with sex segregation in the world of work, the corresponding educational trends can be addressed in Montserrat, in planning for the social and economic future of the island and, in consideration of new economic areas of growth in the Blue Economy. Some key points are:

- UNICEF reported in the Situation Analysis of Children in Montserrat 2016, [1]that “The transition from secondary to tertiary education has led to the phenomenon of ‘brain-drain’, where the population aged 15–24 is leaving in search of tertiary education and job opportunities abroad... [and that] limited access to further education, relatively poor wages and limited opportunities for economic activity and promotion through any of the government agencies mean that many Montserratians saw their future as resting in the UK or elsewhere rather than on the island”.
- Whilst available data on CSEC subjects taken is not available by sex, there are trends globally and in the Caribbean region, showing the lack of engagement of girls in Science, Technology, Engineering and Math (STEM) subjects. To begin to address occupational sex segregation and avoid this type of structural inequality in emerging economies in Montserrat including the blue economy, girls and female youth can be encouraged to expand educational interests into STEM subjects, so that they can access technical and specialised fields, which are paid better and offer more expanded life opportunities and experiences for women and girls.

Stakeholder discussion for this rapid assessment highlighted that the Ministry of Education is currently undertaking a curriculum review, which includes attention to sustainable development and climate change among other current issues.

This could lead to the building of an educational foundation for sustainable blue growth and innovation in the economy in general. The importance of linking education with economic developments is critical for reducing brain drain and expanding the sustainable development potential on the island. Education is critical to youth employment, as well as avoidance of brain drain on Montserrat as youth often leave the island to explore more diverse education opportunities, as noted previously.

Montserrat Port Development Project: Suggested Case Study for informing Blue Growth

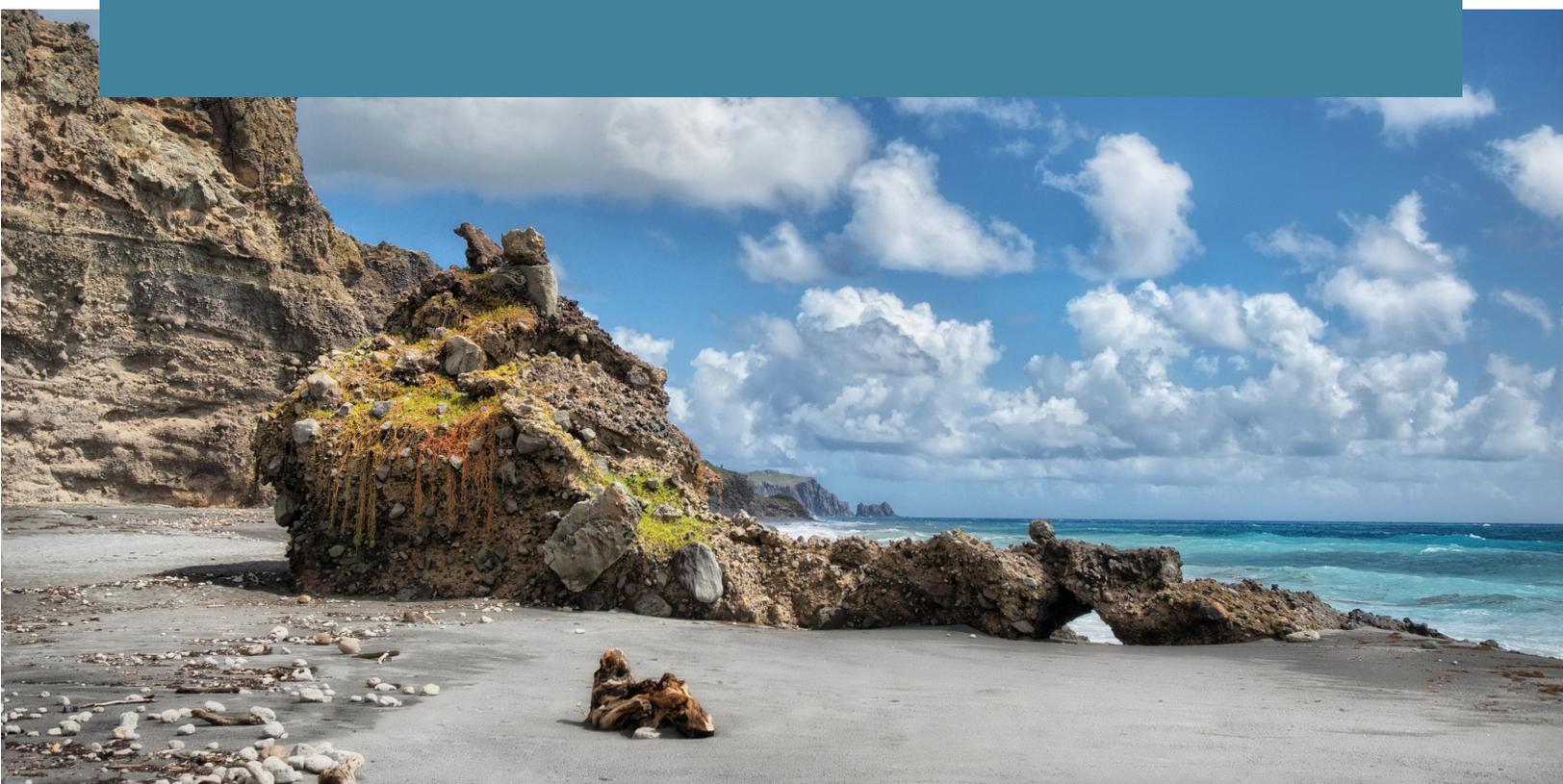
The Draft Report of the Montserrat Port Development Project Environmental and Social Impact Assessment (ESIA) prepared by Stantec Consulting International Ltd. for the Government of Montserrat, highlights the economic initiatives being planned by the Government within the port development project.

The Port Development Project has several blue economy activities included in it, and as such provides a good opportunity to learn from challenges as well as, there is an opportunity to create a baseline for blue economy expansions. It can be used as a case study to address gender equality concerns and how to mitigate risks and increasing of inequality.

Particularly, concerns raised include issues of safety for women, and the likelihood that they will be economically marginalised due to occupational sex segregation. Violence against women in the workplace, as well as harassment and sexual exploitation are sighted as serious concerns, based on the existing vulnerabilities of women and the context of gender inequality in Montserrat. There are several livelihood opportunities outlined including for during the construction process as well as, after.

The draft ESIA identifies several gender considerations including but not limited to the following:

- ‘Due to pervasive gender stereotyping, male workers are focused in agriculture, fishing, mining, manufacturing, energy, construction, transport and public administration sector, while female workers dominate the service sectors of health, social work, community work, education, financial intermediation, hotels and restaurants; [therefore],
- Based on the nature of the project, mainly men are expected to benefit from employment due to the gender imbalances in construction and operations of this nature.
- Issues of domestic violence – already relatively high compared to other crimes. This could worsen if new economic opportunities open up for women without parallel psycho-social interventions for women and their partners.
- There is potential for sex work and human trafficking, especially of women and children.
- Explore existence of / opportunity for capacity building/progressive workplace policies in the implementing entity(ies)/private sector company(ies) including, but not limited to, workplace sexual harassment, safety and wellbeing, equal pay and gender-based violence (including Sexual and Reproductive Health and Rights)”



THE MONTSERRAT SOCIAL AND ECONOMIC POLICY AND PLANNING LANDSCAPE: CONSIDERATIONS FOR EQUITABLE BLUE GROWTH FOR WOMEN AND MEN

In the research paper *Gender Roles in Inclusive Blue Economy* the authors note the challenges of women, to equality of access to benefits of blue economic growth. They use the examples of aquaculture and fisheries particularly, as areas where women play a large role, but are limited in their access to and control of resources. They highlight that ensuring women benefit equitably from blue growth, is a critical issue in blue economy development, the need for serious policy consideration of the same, and the collection of relevant socio-economic data to facilitate this (W.Leal Filho et al. 2020).

In light of this, stakeholder discussion at the time of writing of this report indicated a lack of attention to targeted and strategic planning on a sectoral level. Sectoral planning is critical to economic expansion, and in particular, blue economy expansion will require targeted and strategic planning. The Montserrat Country Gender Assessment (CGA) (CDB 2015) notes the following gender equality policy landscape, Montserrat does not have a Gender Equality Policy and Action Plan:

- The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) has not yet been extended to Montserrat by the United Kingdom.
- The Constitution and a number of laws promote gender equality including the
 - Matrimonial Proceedings Act 2010
 - The Family Protection Against Domestic Violence Act
 - The Labour Code
 - The national policy development framework.
- “The 2008–2020 Montserrat Sustainable Development Plan, makes no reference to gender equality and nor does it employ gender indicators.”

Key recommendations for legislation, policy and planning made in the Montserrat CGA include:

- Mainstream gender into all development policies and plans with specific gender-sensitive indicators to measure implementation.
- Develop a national strategy and action plan to end domestic and sexual violence, to include court advocacy services and counselling. Economic empowerment programmes can also be included to deter survivors from returning to perpetrators due to financial insecurities.

The overarching policy and planning landscape in most Caribbean countries is largely gender blind. Whilst there are many relevant policy, planning and programme development documents related to the Blue Economy, there are a few strategic overarching documents which need to be gender responsive, to facilitate equitable access to opportunities and benefits of women and men, boys and girls, and most importantly to guide gender responsive elaboration of sectoral plans.

In Table 6 below, the documents identified are directly linked to social and economic development and have goals meant to impact the lives of people in Montserrat. Given the limits of this assessment, detailed recommendations were not possible, but general recommendations are made, with the key point being that future revisions of these documents, must take better account of gender as a variable to make planning and development outcomes more relevant to the needs and strengths of the people, and therefore more successful.

Definitions for assessing gender considerations in policy analysis include:

Gender-blind economic, legal and social policy and plans ignores the different situations, roles, needs and interests of women, men, girls, boys and third gender persons.

Gender-neutral economic and social policy is not affected by, and does not affect, the different situations, roles, needs and interests of women, men, girls, boys and third gender persons. In reality, very few policies are gender-neutral. When policy makers claim a policy is gender-neutral, they are usually being gender-blind.

Gender aware policy and plans acknowledge the differences in roles and relations between women and men. It recognises that the life experiences, expectations, and needs of women and men are different.

Gender sensitive social and economic policy and plans recognises the different perceptions and interests of women and men arising from their different social locations and different gender roles. Gender sensitivity is often used to mean the same as gender awareness, although gender awareness can also mean the extra ability to recognise gender issues which remain “hidden” from those with a more conventional point of view.

Gender-responsive economic and social policy and plans considers and addresses the different situations, roles, needs and interests of women, men, girls, boys and third gender persons.

TABLE 13: GENDER RESPONSIVENESS OF KEY POLICIES AND PLANS

Document	Level of Gender Responsiveness	General Recommendations
The Montserrat Sustainable Development Plan 2008-2020: Journey to Sustainable Prosperity, A Healthy and Wholesome Montserrat	Gender Blind	This is a critical planning document related to social and economic development. Therefore, gender equality considerations are important, for best meeting the development needs of men and women, girls and boys. Future planning should take into account the different needs and vulnerabilities of women and men, boys and girls. The use of gender analysis which seeks to take a nuanced look at the relationships between development outcomes for women and men, boys and girls, for example: addressing disparities in the between education and employment outcomes, and occupational sex segregation
Montserrat Economic Growth Strategy and Delivery Plan	Somewhat gender aware, but the document is largely gender blind. p. 52: women noted as having skills sets that can be harnessed for supporting enterprise for all goals, and for supporting expansion of business p. 53: women are noted with youth as examples of groups that business support services need to meet the needs of p.54: In 2018 a women in business club will be established with mentor support	This document is central to government planning directly impacting the social and economic lives of the people of Montserrat. As such, gender equality issues is of concern. In particular the stark occupational sex segregation with disproportionate participation of men in most sectors, disproportionate burden of care on women, and concentrations of women in low skills jobs across sectors. As well, determining the different needs of women and men, and different challenges they face, would help to tailor programmes and support systems, leading to a better quality of life, and better life outcomes for everyone. It is important to find out if the Women in Business Club was established and if yes, how does it operate? Are women encouraged in traditional or non-traditional markets?
Physical Development Plan for Montserrat 2012-2022	Gender blind	As a planning tool meant to compliment the Montserrat Economic Growth and Delivery Plan, the above considerations should also be taken into account here. Populations are not homogenous, and life experiences are largely impacted by social roles and expectations. Development has to take into account the positive and negative impacts of the same. Women and men, boys and girls, by virtue of these roles and expectations experience different vulnerabilities and strengths.
Montserrat National Environment Management Plan 1994	Gender Blind	At the time of writing it was not clear if this plan had been updated.
COVID19 Business Impact Assessment Report	Gender Sensitive	The document does contain sex disaggregated data and this is very positive. A more nuanced analysis could have been facilitated re: differential impacts of the pandemic on women and men in terms of employment status and business ownership could have been pursued.
St George's Declaration of Principles for Environmental Sustainability in the OECS; National Environmental Management Strategy (revised 2006)	Gender blind	Considering the overall context of <i>occupational sex segregation in the OECS in general, as well as other issues such as lack of equal pay for equal work for women, gender pay gaps across member states, as well as informal employment and underemployment affecting women and men differently</i> ² , this document should have made gender equality provisions as key to supporting sustainability and resilience..
The Draft Report of the Montserrat Port Development Project Environmental and Social Impact Assessment (ESIA)	Gender aware	As noted previously in this rapid assessment, this document clearly acknowledges the differential opportunities and vulnerabilities of women and men.

Critically however, even when Caribbean countries do have Gender Equality Policies and Plans, this seldom translates into sector specific provisions. Implementation is also more often than not, left to the Gender Bureau/national Women's Machineries which are typically under-resourced and not integrated into the decision-making processes for key economic activities. The Caribbean Fisheries Gender Scoping Study Preliminary Report notes that; fisheries management plans seldom include gender equality considerations and identifies few countries with an active gender policy that made any mention of fisheries, or at least the agriculture sector with which it is associated or natural resource management. For example, the Dominica National Gender Policy and Action Plan 2006, which was updated for 2014-2024, noted the limited capacity of Gender Bureau to monitor, report on and implement strategies (CERMES 2018).

The Country Gender Assessment for Montserrat made the following recommendations which are relevant to policy development and can be integrated where relevant into economic policy:

- Develop a national strategy and action plan to end domestic and sexual violence, to include court advocacy services and counselling.
- Economic empowerment programmes can also be included to deter survivors from returning to perpetrators due to financial insecurities.
- Complete the national legislative review process and enactment of laws to facilitate the extension of CEDAW to Montserrat.
- Mainstream gender into all development policies and plans with specific gender-sensitive indicators to measure implementation.
- Appoint a gender coordinator with the primary focus and responsibility for gender-related issues in order to effectively and efficiently deliver gender mainstreaming services and capacity building at the national level.

SOCIO-ECONOMIC CONTEXT

SUMMARY FINDINGS OF SOCIAL AND ECONOMIC CONSIDERATIONS

INTRODUCTION

As noted in the main findings, socio-economic development related to the blue economy, and for sustainable and equitable economic development in general, key variables to take into account include the current policy landscape, as well as trends in education and the corresponding access to employment, the position of women and men in the economy/labour force, and the types of labour being invested in from migrant populations as well as the sex composition of the same.

Summary findings as follows:

HUMAN RESOURCES AND BLUE GROWTH

A large proportion of the island is uninhabitable, limiting the space for human settlements, although some of this land is being opened up as part of current economic development planning.

Data shows (most recent 2018) that a large percentage of the population is of working age (66%) and prior to the COVID-19 pandemic 83% of the working age population was employed.

Therefore human resources are needed for the expansion of the economy in general, specialised skills would be required, not yet being addressed by the educational institutions on island.

Access to wider education and employment opportunities on island for youth is critical to avoid brain drain from them leaving the island (depleting the workforce) and to expand the blue economy

The general breakdown of the activity of the labour force in the relevant economic sectors shows very little blue economy employment activity.

There are opportunities for blue development in the priority areas identified for support within the Memorandum of Understanding for Non-Budget financial and Capital investment Programme for Resilient Economic Growth (CIPREG) (ARTES 204712), i.e. Education, WATSAN and renewable energy. (See section on the Social and Solidarity Economy).

The Port Development Project has several blue economy activities included in it, and as such provides a good opportunity to learn from challenges. There is an opportunity to create a baseline for blue economy expansions. It can be used as a case study to address gender equality concerns and how to mitigate risks and increasing of inequality.

Particularly, concerns to be addressed as indicated in the draft Environment and Social Impact Assessment undertaken, include issues of safety for women and the reality that they are likely to continue to be economically marginalised due to occupational sex segregation.

Violence against women in the workplace, as well as harassment and sexual exploitation are sighted as serious concerns, based on the existing vulnerabilities of women and the context of gender inequality in Montserrat. (See section on the Social and Solidarity Economy)

EQUITABLE BLUE GROWTH

Creating an enabling environment for Blue Economy Growth has to include equality of access to opportunities as well as, access to decent work, support for youth employment and also, attention must be paid to addressing poverty reduction and mitigation. Below are the summary findings related to supporting equitable blue growth.

- Trends in Montserrat regarding occupational sex segregation, and the tendency of blue economy activity to have disproportionately higher participation of men than women, suggests that any blue economy planning and expansion has to address gender stereotypes. These stereotypes limit women's and men's decisions about their choice of occupation, as well, equality of access of women to economic benefits of blue economy activity is an essential consideration for training, marketing of jobs, and the provision of safe working environments.
- Solid research into reasons for unemployment among men and women (including youth) is needed to determine their needs and challenges, to inform blue economy planning.
- Growth and development planning for the blue economy would benefit from linking education, labour force development and poverty reduction goals to determining human resource needs and building human resources capacity.
- No specific programmes have been highlighted to support gender equality in business. The setting up of a Women's Business Club was an action item in the Economic Growth Strategy and Development Plan for Montserrat 2018, but stakeholders asked have said that this was not realised to their knowledge.
- From the results of the COVID-19 Business Impact Assessment, support for targeted women's access to business support and successful business development is required. The need to address informal employment and even application of regulation for the conduct of business needs addressing.

Of particular note is employment for female and male youth, and the assurance of decent work, and the protection of their human rights noting that young people are often vulnerable to wage exploitation and transactional sex in the region.

The policy and planning landscape for economic development and corresponding physical development planning is largely gender blind, that is, not acknowledging the differential participation of men and women in the labour market and their corresponding needs. The potential for unequal growth and the creation of new socio-economic vulnerabilities is strong given Montserrat's tendency towards occupational sex segregation, leading to marginalisation of women in accessing the benefits of the most productive employment.

It is recommended that the initial COVID-19 response process be reviewed and the impacts on the job market and the socio-economic conditions of Montserradians be addressed. This includes looking at the burden of care on social services systems, and also addressing increases in crime and violence as reported to the police and health authorities.

As previously mentioned, noting that the number of visitors to the island has decreased dramatically, from 20,976 to 8,149, in 2020, it is reasonable to assume that service-oriented industries will be heavily affected and that they notably employ larger numbers of females than males. This has further implications for household poverty.

A Gender Equality Strategy and Action Plan are essential, and recommended in the Country Gender Assessment for Montserrat. It can address decent work for women and men, as well as, include attention to sustainable development inclusive of climate change adaptation and mitigation, in addition to addressing gender based violence, and harassment in the workplace, including sexual harassment and the reluctance to report the same. It can also address male and female youth, migrant workers and other vulnerable groups and how they can be protected in the context of economic growth and in the context of addressing inequality overall.

BUILDING FORWARD BETTER

Addressing structural inequalities is a pivotal element of “building forward better”. The following are highlighted as key areas to be cognizant of as economic development planning continues:

- Differences in female and male vulnerability to risk from social, economic and environmental shocks are compounded by socioeconomic status, geographic context, cultural and religious beliefs related to gender roles and migration status among others.
- Gender responsive and human rights based recovery and response is therefore critical to reducing deprivation, income poverty, abuse and violence and the psychological trauma of social, economic and environmental shocks.
- The blue economy has been noted by many including the European Union as providing an opportunity for social and economic strengthening in light of the COVID-19 pandemic.
- Blue Economy development can be viewed as a way to build forward better, and develop an economic system that is adaptive to shocks. This means planning that will make gains towards solving development challenges, before shocks occur, and thereby limit the negative impacts of the same.

BLUE ECONOMY DEVELOPMENT AND THE SOCIAL SOLIDARITY ECONOMY

Following on the above, is the recommendation of supporting the social and solidarity economy (SSE). This is based on the success of this model as a multi-sectoral, people led, whole systems-based framework. That is, strengthening of local economies, environmental sustainability and human rights based development is already at its core, and it includes public, private and third sector economic systems building.

- This includes attention to micro, small and medium enterprise support, with a focus on decent work and increases in productive capacity of communities and countries in general.
- Supporting the development of gender responsive blue economy social and solidarity economy (SSE) networks is a critical step. This will include solid integration/connections between NGOs, Credit Unions, Banks, Government, Development agencies, entrepreneurship and business programmes, targeting female and male youth and other marginalised groups. As well as for developing diaspora related initiatives. The focus will be to strengthen local economies and building in sustainability into blue economy initiatives.

STATISTICS FOR EQUITABLE AND HUMAN RIGHTS BASED BLUE ECONOMY GROWTH

It is often assumed that use of sex disaggregated data automatically makes a document gender responsive, or that paying attention to gender means being exclusionary. This is a common misconception amongst policy makers and others. However, it is only the beginning of a gender analysis, and to generate gender statistics, gender analysis is used to make relationships between data, and provide accurate causal and correlated information.

Gender statistics are defined by the United Nations (UN 2016) as statistics that adequately reflect differences and inequalities in the situation of women and men in all areas of life.

Gender statistics are defined by the sum of the following characteristics:

- (a) Data are collected and presented by sex as a primary and overall classification;
- (b) Data reflect gender issues;
- (c) Data are based on concepts and definitions that adequately reflect the diversity of women and men and capture all aspects of their lives;
- (d) Data collection methods take into account stereotypes and social and cultural factors that may induce gender bias in the data.

As policy, planning and programme development documents are largely gender blind in Montserrat, it is recommended that the Statistics Department undertake:

- Additional training on the production and analysis of gender statistics and the writing of corresponding reports. This can begin with Labour Force Survey Data, and be expanded to the Census and Survey of Living Conditions and Household Budgets.
- Expand the industry and occupations categories in the Labour Force Survey to take into account blue economy expansion and increased labour force participation in blue economy sectors.

RECOMMENDATIONS

Following on the summary findings, corresponding recommendations can be pulled from the Country Gender Assessment for 2015 as follows:

“Develop a gender-sensitive agricultural sector plan/policy that includes an assessment of constraints faced by women in entering the industry.

Introduce a gender-sensitive recruitment process for training in the tourism sector and ensure all forthcoming training sessions do not perpetuate the current segregation.

Ask that the Montserrat energy sector to address the gaps identified in the policy, ensuring that gender indicators are incorporated in forthcoming policy action plans.

Introduce social dialogue on occupational segregation in the mining industry for senior managers and directors to develop a consultative strategy to bridge the gender gap in the industry”.





Existing Governance Arrangements

*Legislative Framework
National Policy and Planning Environment
Institutional Arrangements
Recommendations*



INTRODUCTION

This rapid assessment outlines Montserrat's existing governance arrangements related to activities occurring in its 'blue space', and makes recommendations for strengthening policy and planning for sustainable Blue Economy Development.

Part 1 of this section provides an overview of the national legislative framework and corresponding policies and plans. Relevant regional and international policies/agreements can be found in the appendices.

Part 2 presents the existing governance structure in place via Montserrat's government, non-governmental organisations, non-profit organisations, and other external donor partners that work to enable Montserrat to realise a viable blue economy.

Part 3 provides recommendations to achieve an integrated governance framework for Montserrat's blue economy.

LEGISLATIVE FRAMEWORK

A wide range of laws and policies govern the use of the ocean in Montserrat, ranging from sector-specific such as the 2013 Fisheries Act to very broad legislation—most notably, the Conservation and Environmental Management Act of 2014 (CEMA), which addresses issues from protected areas to maritime pollution (ELI, 2015).

Table 14 below outlines legal instruments related to blue economy development, associated objectives and the responsible government agencies. At the time of writing this assessment, it is still not clear whether the implementation and enforcement of existing legislation is adequate, thus highlighting the need for further investigation. For this reason, it is proposed that an in-depth assessment to ascertain the efficacy of current legislation to support existing and emerging sectors of Montserrat's blue economy be conducted.

TABLE 14: NATIONAL LEGISLATIVE FRAMEWORK

Legal Instrument	Objectives that enable Montserrat’s Blue Economy.	Responsible Agency
Montserrat National Trust Act (1970 rev. 2013)	Incorporating the Montserrat National Trust with limited liability.	Montserrat National Trust
Conservation and Environmental Management Act (CEMA) (2014)	For the conservation and proper use of forests, the management of wildlife, and the establishment and management of national parks and protected areas, for example, marine protected areas, monitoring and registration of polluters and regulation of permits for scientific research.	MALHE – Department of Environment
Trade in Endangered Species Act (2016)	Incorporation of the Convention for the International Trade in Endangered Species into local law. Restricts the import and export of endangered species.	MALHE – Department of Environment
Beach Protection Act (1980 rev. 2013)	To regulate the removal of sand, stones, shingle or gravel from beaches and foreshore and to prohibit the fouling thereof.	MALHE – Department of Agriculture
Convention of Migratory Species and Wild Animals Act (1985 rev. 1998 rev. 2011 rev. 2013)	To provide for the implementation of the Convention of the Conservation of Migratory Species of Wild Animals	(MALHE) - Department of The Environment
Turtles Act (1951 rev. 1952 rev. 2002)	To regulate the hunting of sea or river turtles and the taking of their eggs.	MALHE and Royal Montserrat Police Force
Fisheries Act (1983 rev. 2000 rev. 2013)	The promotion, management and conservation of fisheries resources.	MALHE
Wrecks Inquires Act (1876 rev. 1956 rev. 1966 rev. 2011 rev. 2013)	To investigate loss, abandonment, damage or stranding of ships or other casualties on or near the coast.	Deputy Governor’s Office
Revised Port Authority Act (1978 rev.1994 rev. 1995 rev. 1997 rev. 1998 rev. 2005 rev. 2014 rev. 2019)	To establish a port authority to provide and administer a coordinated and integrated system of port facilities and services.	Montserrat Port Authority
Port Authority Regulations (1906 rev. 2013)	Regulations guiding the functions of the port.	Montserrat Port Authority
Piers and Wharves Act (1936 rev. 2013)	To designate and delimit any wharf, pier or jetty as a public shipping place.	Deputy Governor’s Office
Physical Planning Act (1996 rev. 2019)	For the orderly and progressive development of land, the acquisition, preservation and management of historical buildings and sites and for restricting the exports of artefacts.	Physical Planning Unit & Montserrat National Trust
Disaster Preparedness and Response Act (1999 rev. 2013)	For the effective management and control of disaster and related matters.	Disaster Management Coordination Agency & Governor’s Office
Cooperative Societies Act (1959 rev. 2019)	To promote economic interests in accordance with cooperative principles.	Ministry of Finance
Caribbean Development Bank Act (1970 rev. 2002)	To accelerate the economic development of member states and to improve the standard of living.	Ministry of Finance
Tourist Board Act (1993 rev. 2013)	To establish a tourist board to develop the tourism industry and promote its efficiency.	Office of the Premier
Minerals Vesting Act (1996 rev. 2002)	To designate what minerals and precious minerals can be mined.	Deputy Governor’s Office

LEGISLATIVE FRAMEWORK cont'd

A profound recommendation made by ELI (2015) that is still relevant today is the importance of the 2014 CEMA Act in promoting ocean governance. They suggest that "CEMA implementation could serve as a tool to achieve an enforceable legal framework for sustainable ocean management. In particular, the legal needs from CEMA implementation involve three steps:

1. supporting the further development and completion of existing draft regulations;
2. supporting the development of new regulations for other provisions required to give effect to the Act; and
3. supporting development of non-regulatory documents needed to implement the Act—notably including a Protected Area System Plan.

The authors outline that "subordinate legislation is needed to cover several areas relevant to Blue Halo Montserrat (BHM), but has not been drafted to date, most notably Protected and Unprotected Fish and other Marine Life; and Monitoring, Enforcement and Assessment of Orders, Plans and Audits. Additional staff and resources would be required both to complete these and other regulations and to effectively implement the new law."

Cross-cutting themes affecting ocean governance such as waste management, climate change adaptation (CCA), disaster risk management (DRM) and the eco-system approach to fisheries (EAF) can be prioritised to be a part of the supporting legislative framework for integrated ocean governance and sustainable ocean management in Montserrat.

Prioritising that the development of a ban on plastics and styrofoam supported by relevant legislation and policy instruments can be considered. This can facilitate the formulation of a waste management strategy to be integrated into the island's Sustainable Development Plan (SDP) and Physical Development Plan (PDP).

NATIONAL POLICY AND PLANNING ENVIRONMENT

As one of the British Overseas territories in the Caribbean, Montserrat has benefited from technical and financial assistance from the Government of the United Kingdom to shore up its integrated ocean governance framework. The overarching policy framework that guides this assistance is the Montserrat Environment Charter for the UK government, the government of Montserrat and the people of Montserrat (Gov of Montserrat and Gov of the United Kingdom 2001).

The UK Government has also developed a 5-year 'Blue Belt' Programme (see appendix), a network of large Marine Protected Areas involving British OTs (MALHE 2019). The main aim of the programme is to put in place protection and sustainable management measures for over 4 million square kilometres of oceans around the Overseas Territories (Government of the United Kingdom 2020; Howson 2020).

As a full member of the OECS, Montserrat has also significantly benefited from guidance from the Eastern Caribbean Regional Oceans Policy (ECROP). ECROP sets the framework for an OECS wide approach to develop a regional integrated ocean governance framework (including regional oceans policy) to be shored up by the establishment of an overarching advisory committee/multi-sectoral institutional coordinating mechanism known as the OECS Ocean Governance Team.

A key recommendation is that the policy will be complemented by the development of country-specific national ocean policies and ocean committees. In 2019, the ECROP was revised to align with the UN Agenda 2030 for Sustainable Development – SDG 2030 (OECS Secretariat 2013, 2020).

Montserrat currently has no comprehensive national ocean policy. However, since Blue Halo Montserrat's inception in 2017, there have been preliminary discussions facilitated by the Waitt Institute (an external non-profit partner) with key stakeholders toward developing and implementing solutions for sustainable ocean management, including a sustainable ocean policy for the island (Waitt Institute 2020).

NATIONAL POLICY AND PLANNING ENVIRONMENT

Another important recommendation of this assessment is the establishment of an overarching National Ocean Governance Committee (NOGC) to be guided by the development of a National Oceans Governance Policy (NOGP) and supported by an adequate regulatory framework. The creation of a NOGC to be guided by a NOGP are in fact both requirements of ECROP and have been since 2013. The island currently has several national overarching, crosscutting and sector specific policies (mostly out of date or in draft) and plans that are highly relevant for the management of the island’s ocean and marine resources.

These policies and plans are listed below:

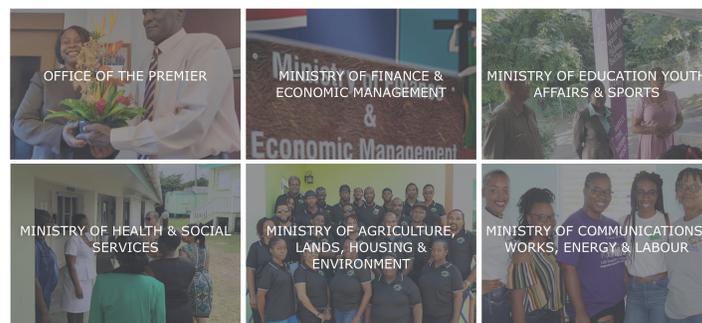
- Sustainable Development Plan (2008-2020)
- Government of Montserrat Corporate Plan (2003-2006)
- Physical Development Plan for Northern Montserrat (2012-2022)
- National Environment Action Plan (1994)
- The National Disaster Preparedness Response Plan
- Economic Growth Strategy and Delivery Plan for Montserrat (2018)
- Montserrat Youth Policy Draft (2013)
- Montserrat Sports and Recreating Draft Policy (2019)
- Montserrat Cultural Policy Draft (2012)
- Montserrat National ICT Policy, Strategy and Implementation plan (2012-2016)
- Draft Climate Change Policy (2020)
- Agriculture strategy and marketing plan (2016-2021)
- Draft Fisheries Management Plan (Updated April 2006)
- Montserrat Tourism Master Plan (2015-2025)
- Montserrat Tourism Strategy (2019-2022)
- Montserrat Energy Policy (2016 - 2030)
- Health, safety and environment management guidelines for sand mining in Montserrat: an operational plan for reducing environmental and social impacts (2012)

INSTITUTIONAL ARRANGEMENTS

Government Agencies, Non-Ministerial Departments, and the Legal Department Montserrat’s Government Structure Montserrat is an internally self-governing overseas territory of the United Kingdom. The most recent change of administration occurred in November 2019. The government has three branches: legislative, executive, and judicial (Elections 2020).

In the legislative branch led by the Office of the Premier, six super ministries which host sectorial sub-divisions comprise Montserrat’s parliamentary governing structure (see Figure 12 below).

In addition, several non-ministerial departments including the Office of the Deputy Governor, as well as the legal department have significant roles in the island’s governing structure for ocean and marine resources (Figures 13).



GoM Website

FIGURE 12 : GOVERNANCE STRUCTURE OF MONTERRAT’S GOVERNMENT MINISTRIES RELATED TO HAVING OVERSIGHT OF MONTERRAT’S BLUE ECONOMY

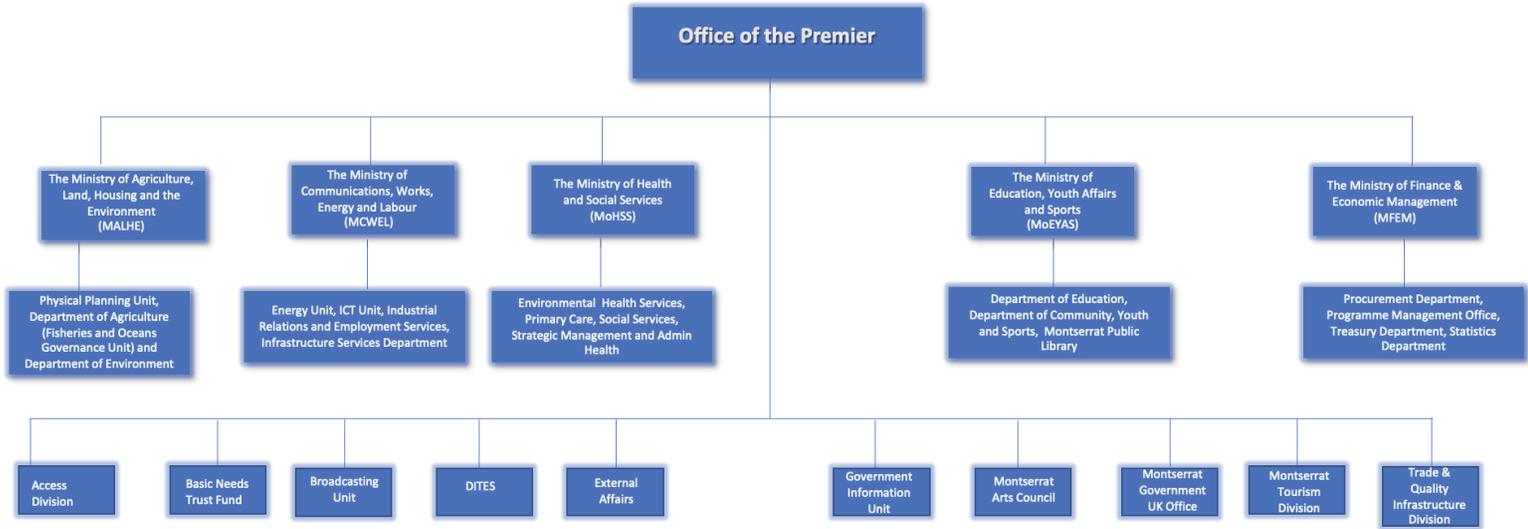
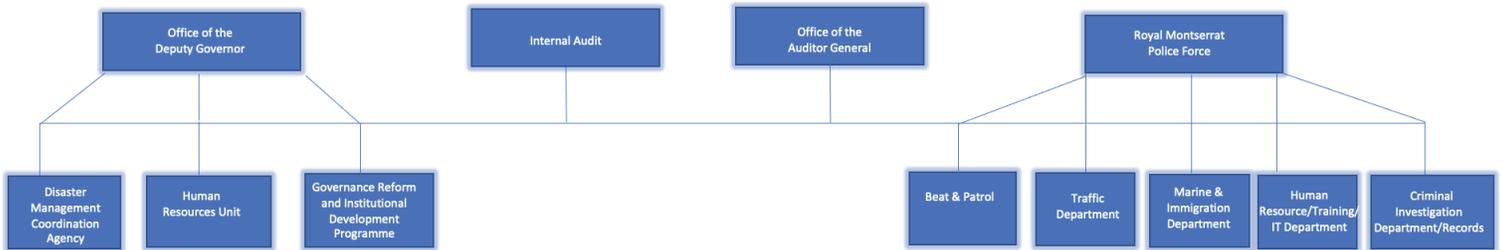


FIGURE 13: GOVERNANCE STRUCTURE OF MONTERRAT’S NON-MINISTERIAL DEPARTMENTS RELATED TO HAVING OVERSIGHT OF MONTERRAT’S BLUE ECONOMY



National Inter-sectoral Coordinating Mechanisms

The ECROP has established the need for member States to establish coordinating agencies, together with national inter-sectoral committees, with a mandate for integrated ocean management.

At the national level, it is the aim that these bodies will provide the functional link between the OECS member States and the OECS Secretariat with respect to matters relating to ocean governance (OECS Secretariat 2013, 2020).

Montserrat is indeed well positioned to execute this recommendation given the fact that several national inter-sectoral coordinating mechanisms have been identified to play a role in enabling Montserrat's blue economy. The most relevant of these include:

- The Fisheries Advisory Committee,
- The Blue Halo Steering Committee,
- The National Conservation and Environmental Advisory Council,
- The Maritime Administration,
- The Montserrat National Trust Council,
- The Montserrat Arts Council,
- National Disaster Preparedness and Response Advisory Committee; and
- The recently formed Montserrat Tourism Stakeholders Advisory Council.

Key informant interviews have highlighted that apart from the Montserrat Tourism Stakeholders Advisory Council and the Montserrat National Trust Board, these committees have been largely non-functioning and have duplicating mandates. In addition, a human resource capacity issue has been identified as the persons appointed to these committees are mostly the same.

At the writing of this report, there was no access to a complete picture of the membership structure of the committees/councils listed above. However, findings suggest that representation by women and youth is limited. Thus promoting the equitable participation of women and youth in decision-making processes for ocean governance is recommended.

Further to align with a key recommendation of this assessment, focus can be shifted to creating an overarching integrated national ocean governance committee i.e. a NOGC guided by a NOGP. The aim is to establish a coordinated institutional mechanism for integrated marine management across all blue economy sectors.

This committee would oversee all future maritime activities (beyond fisheries and tourism) and decision making to function as the sole high-level government advisory committee on ocean related matters.

Non-Governmental Organisations and Non-profit Organisations

They are a several non-governmental and non-profit organisations that have been identified as having a mandate related to the management of Montserrat's ocean resources.

Their keys areas of focus in promoting and enabling Montserrat's blue economy is detailed in Table 15. A few organisations are highlighted below:

Montserrat National Trust
Website: <http://montserratnationaltrust.ms/>

WAITT Institute
Website: <https://www.waittinstitute.org/blue-halo-montserrat>

Montserrat Fishing and Boaters Association
(No website, social media page or logo available)

EcoMontserrat
Facebook: <https://www.facebook.com/ecomontserrat/>

ScubaMontserrat Dive Shop
Website: <https://www.scubamontserrat.com/>

Montserrat Yachting Association
Website: <http://www.yachting.ms/en>

Interact Club of Montserrat
Facebook: <https://www.facebook.com/InteractClubMNI/>

Fish 'N Fins (Aqua Montserrat)
Website: <https://www.aquafishnfins.com>

The Montserrat Recovery and Development Foundation
Website: <https://montserratrecovery.com>

Young Entrepreneurship Association of Montserrat
<https://www.facebook.com/YEAMontserrat/>

Montserrat Red Cross
<https://www.redcross.org.ms>

Donor Funding Agencies

Montserrat has also benefitted institutionally from technical and financial support from the Centre for Environment, Fisheries and Aquaculture Science (CEFAS) and the Joint Nature Conservation Committee (JNCC) both via the UK Government with oversight from the Foreign Commonwealth and Development Office (formerly the Department for International Development (FCDO).

CEFAS

CEFAS is the UK government's marine and freshwater science experts. Their specific focus is on keeping seas, oceans and rivers healthy and productive as well as safe and sustainable seafood by providing data and advice to the UK government and overseas partners.

Key projects include:

- Darwin Plus (Institutional readiness for climate change adaptation)
- Commonwealth Marine Economies Programme

JNCC

JNCC is the public body that advises the UK Government and devolved administrations (i.e. UK OTs) on UK-wide and international nature conservation.

Key projects include:

- Marine Spatial Plans
- Coral Reef Restoration and Management

FCDO

Main aid funder for the Government of Montserrat.

Key projects include:

- Financing the GRID programme under the Office of the Deputy Governor
- MOU for Non-Budget Financial and Capital Investment Program for Resilient Economic Growth (CIPREG).



TABLE 15 : NON-GOVERNMENTAL AND NON-PROFIT ORGANISATIONS THAT HAVE A STAKE IN MONTSERRAT’S BLUE ECONOMY

Non-Governmental Organisation/ Non-Profit Organisation	Key Areas of Focus that can support the Blue economy vision in Montserrat.
Montserrat National Trust Website: http://montserratnationaltrust.ms/	<ul style="list-style-type: none"> • Conserve and/or rehabilitate the natural and cultural heritage to include historical sites, artefacts, documents related to Montserrat’s marine environment. • Promote biodiversity and aesthetics of Montserrat’s marine environment. • Continue public awareness and outreach of the benefits of a blue economy in Montserrat. • Continue fund-raising in support of programmes that can benefit blue growth, for example, the Ocean Fund in partnership with the Waitt Institute. • Update the Montserrat National Trust strategic management plan to include a focus on blue growth.
WAITT Institute Website: https://www.waittinstitute.org/blue-halo-montserrat	<ul style="list-style-type: none"> • Continue assessments of marine resources and fish stocks as well as the experimental fish trap programme. • Continue community consultations to understand local priorities for conservation, ocean uses and zone boundaries. • Continue the Montserrat youth and apprenticeship program with a focus on blue sectors beyond fishing. • Continue to work with the Government to implement the island’s marine spatial plan • Continue to promote and streamline the Montserrat Ocean Fund in partnership with Montserrat National Trust.
Montserrat Fishing and Boaters Association	<ul style="list-style-type: none"> • Continue to represent the concerns of membership (particularly young fishers) • Develop a strategic plan to procure equipment and access project funding for members • Develop a strategic plan to support and oversee the fisheries activities of members
EcoMontserrat Facebook: https://www.facebook.com/ecomontserrat/	<ul style="list-style-type: none"> • Work with MALHE to produce a policy and legislation for marine pollution (i.e. reduce plastic waste)
Scuba Montserrat Dive Shop Website: https://www.scubamontserrat.com/	<ul style="list-style-type: none"> • Collaborates with Montserrat’s tourism division to promote dive operations and to teach coastal and marine conservation is part of an eco-tourism initiative.
Montserrat Yachting Association Website: http://www.yachting.ms/en	<ul style="list-style-type: none"> • Work with Montserrat’s tourism division to promote yachting as a driver of blue growth with a particular focus on engaging expats and the wider diaspora community.
Interact Club of Montserrat Facebook: https://www.facebook.com/InteractClubMNI/	<ul style="list-style-type: none"> • Work with MoYEAS, MALHE and other civil society partners with a focus on youth development to support and facilitate focused youth discussions on sustainable development, ocean affairs, and being drivers of Montserrat’s blue economy.
Fish n Fins (Aqua Montserrat) Website: https://fishnfins.com/	<ul style="list-style-type: none"> • Continue to get youth involved in conservation activities particularly exploring tropical marine habitats, creating ocean art, community projects, internships, sea safety skills and more. • Work with MoYEAS, MALHE and other civil society partners to promote the Fish N Fins Ocean Leaders Project.
The Montserrat Recovery and Development Foundation Website: https://montserratrecovery.com	<ul style="list-style-type: none"> • Work with the Office of the Premier and Montserrat National Trust to develop a strategic action plan to mobilise diaspora support of the island’s redevelopment with a focus on investment in the island’s existing and emerging blue economy sectors.



RECOMMENDATIONS

In summary, Montserrat has a good foundation for blue economy development, with a clear governance structure and corresponding legislation, policies and plans.

The recommendations below note the main gaps identified. Addressing these can support the creation of an enabling environment for equitable and sustainable blue economy development.

The recommendations are as follows:

A profound recommendation made by ELI (2015) that is still relevant today is the importance of the 2014 CEMA Act in promoting ocean governance. In particular, the legal needs from CEMA implementation involve three steps:

1. supporting the further development and completion of existing draft regulations;
2. supporting the development of new regulations for other provisions required to give effect to the Act; and
3. supporting development of non-regulatory documents needed to implement the Act—notably including a Protected Area System Plan.

Cross-cutting themes affecting ocean governance such as waste management can be prioritised as a part of the supporting legislative framework for integrated ocean governance and sustainable ocean management in Montserrat. This includes attention to emerging blue economy sector development according to the most up to date approaches to DRM, CCA, and EAF.

It is also proposed that the development of a ban on plastics and styrofoam be supported by relevant legislation and policy instruments. This can shore up the formulation of a waste management strategy to be integrated into the island's SDP and PDP.

The formulation a fisheries policy and the update of the existing fisheries management plan and associated legislation to integrate concepts of EAF, CCA, and DRM can be considered by The Department of Agriculture (Fisheries and Ocean Governance unit) through MALHE .

The island could look to traditional development partners for technical and financial assistance to develop and expand the sector e.g. FAO/WECAFC, OECS, CARICOM/CRFM, CNFO, CCCCC and CDEMA.

For coastal and marine tourism, it is recommended that the Tourism Master Plan is updated to integrate sustainable tourism concepts and account for blue growth in all sectors i.e. cruise, residential, hotel, sports, eco-tourism, heritage and culture.

These updated plans can consider mitigation strategies to address the fall out of the sector from the COVID-19 pandemic. Technical and financial assistance to achieve updated national tourism development goals can be established through collaborations with the CTO, CHTA, and CAST.

For ports and shipping, maritime legislation needs to be updated in line with the IMO Convention Obligations review for UK OTs due in the first quarter of 2021.

It is further recommended that the development of a port authority/ports and shipping policy is accompanied by strategies that are in accordance with MARPOL and IMO obligations (e.g. waste management strategy, prevention of pollution for noxious liquids etc.).

The Office of the Premier has communicated its intended 100% renewable energy target by 2030. Legislation to support the policy with a focus on developing marine renewable energy, particularly from offshore systems can be considered; with best practices being established with guidance from CCREEE, CARILEC, and CREF.

Although Montserrat has a solid network of civil society groups, if Montserrat is to sustainably realise its blue economy vision, it may need to consider promoting youth organisations like Fish 'N Fins and the Interact Club.

These organisations need financial and technical resources to enhance the lives of the next generation who will be the drivers of blue growth on the island.

Finally the establishment and coordination of a single, cabinet appointed inter-sectoral marine coordination committee can be the vehicle toward achieving Montserrat's Blue Economy vision.



**Creating the
Enabling
Environment for
Equitable Blue
Economy
Development**



CREATING THE ENABLING ENVIRONMENT FOR EQUITABLE BLUE ECONOMY DEVELOPMENT

The proposed recommendations for creating the enabling environment for equitable blue economy development in Montserrat builds on previous work undertaken by the Commonwealth Secretariat (Roberts and Ali 2014) and further developed by the World Bank (Patil et al. 2016).

The study employs the eight critical enablers identified in analysis and proposes the addition of a ninth enabler to support the analytical framework that views blue economy development through a social-ecological system (SES) lens. The limited view of blue economy to marine resource governance and policy is limiting expansion, hence there is a need for a whole-system approach to the analysis.

The nine enablers are listed below:

1. Sustainable and equitable socio-ecological development
2. Integrated approaches to ocean governance
3. A healthy, resilient productive marine environment
4. Sustainable finance and investment
5. Equitable Business development
6. Human capacity development
7. Research and marine information
8. Public awareness and engagement
9. Maritime surveillance, monitoring and enforcement.

Stakeholder engagement recognised the following barriers to further exploration of blue economic growth.

These are noted in the list below, and acknowledge the alignment with the study's overall findings. They address social, economic, environmental, institutional, governance and finance related challenges, as follows:

- Lack of human capacity;
- National priorities;
- Lack of comprehensive marine related datasets;
- Regulation and enforcement;
- Community buy-in;
- Climate variability and change;
- Societal mindsets;
- Traditional gender roles;
- Lack of equal opportunity in the work force;
- Lack of comprehensive socio-economic data; and
- Initial investment capital.

In light of this, the following enablers to support the development of an enabling environment for equitable blue economic development are recommended. It is key to note however, that overcoming barriers such as societal mindsets and national priorities require a concerted effort to raise awareness, and deepen education of civil societies understanding of equitable and sustainable development.

ENABLER 1: SUSTAINABLE AND EQUITABLE SOCIO-ECOLOGICAL DEVELOPMENT

The blue economy is part of a social-ecological system (see figure 14 below), where socio-economic activity is dependent upon natural resources. Therefore social actors and ecological factors are interdependent, and any development in the BE must address this in order to be sustainable and resilient. Ecological components include but are not limited to terrestrial and marine ecosystems, ocean processes, currents, tides and climatic factors.

Social components outlined in the schematic are based on economic activity of people working in blue economy sectors such as fisheries, tourism, energy and the creative industry. Other important actors include government and management authorities, enforcement agencies, judiciary, NGOs, and academic institutions.

The investigation of socio-economic contexts in BE assessments has been limited. Ecological processes have been the primary focus of many studies in the past. Yet a clear understanding of social and economic intersections and the corresponding impact on the natural environment, is integral in overcoming barriers that have been hindering blue economy expansion. The schematic also illustrates the many actions and interventions and ecosystem services that are provided by each component. These are by no means an exhaustive list, but an attempt at highlighting the main factors that can be considered when conceptualising the blue economy.

It is beyond the scope of this rapid assessment to investigate all the factors outlined in the schematic, however, it is recommended that this systems based approach provides guidance for future blue economy scoping studies in the Eastern Caribbean. This approach can employ socio-economic research methods that are based on the principles of sustainable development and take into account ecological impacts.

For the purpose of this study, this framework was used to inform the recommendations. The following are a few policy interventions that can promote sustainable and equitable socio-ecological development.

Policy interventions

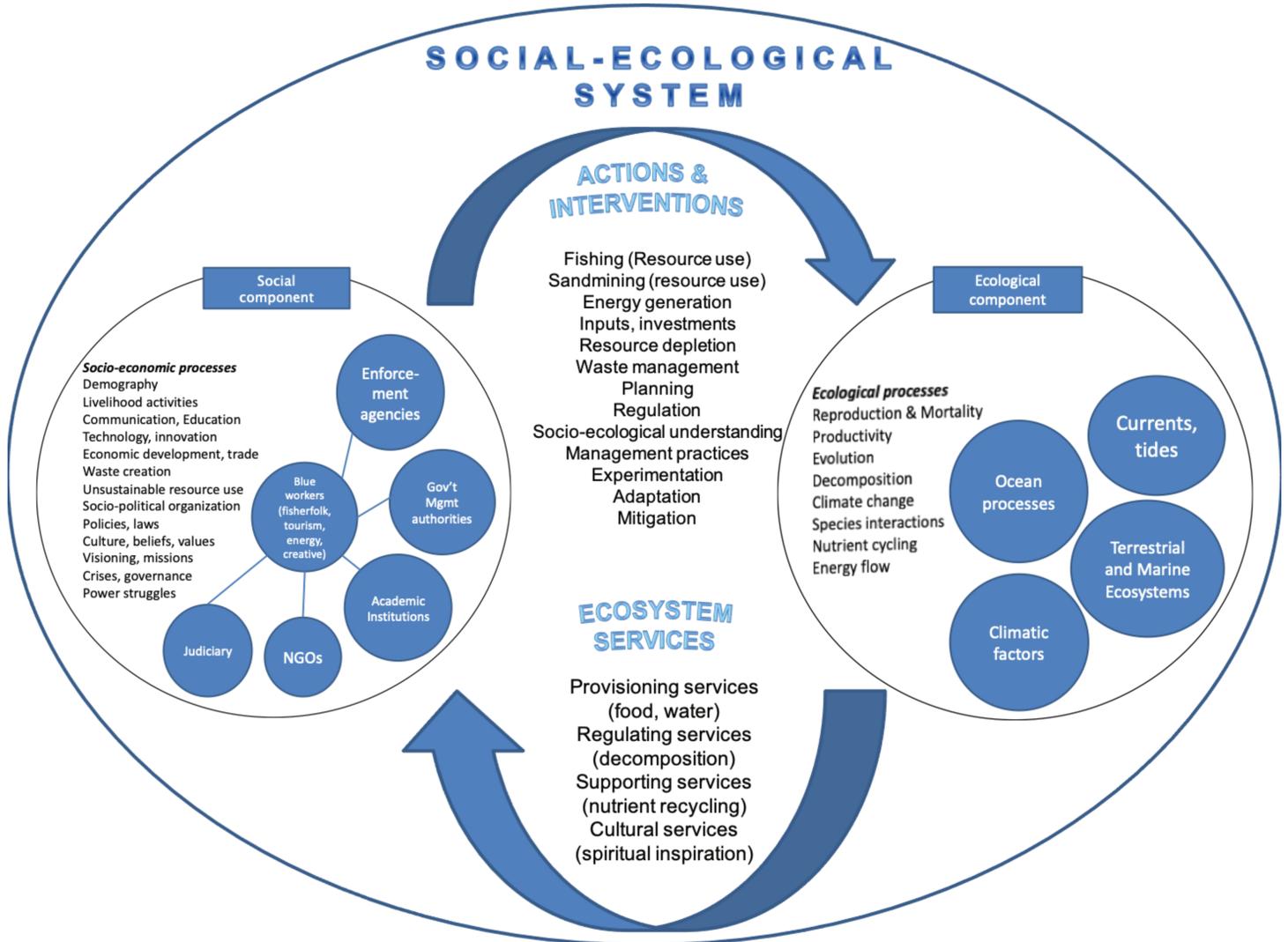
Develop a socio-economic research strategy that investigates socio-economic components of the BE including the construction of labour markets and corresponding worker's rights and protections, value chains and other socio-economic networks impacting the ecological environment.

Employ whole systems management approaches to guide the development of blue economy sector-specific plans and strategies and associated policies.

Conduct ecosystem services assessments and valuations to support policy formulation.

Promote polycentric governance as the ideal system where multiple governing bodies interact to make and enforce rules within the blue economy arena.

FIGURE 14 : BLUE ECONOMY IN MONTSERRAT ILLUSTRATED AS PART OF A SES



ENABLER 2: INTEGRATED APPROACHES TO OCEAN GOVERNANCE

The previous section Existing governance arrangement gives insight into Montserrat's policy environment that has shaped how ocean resources have been governed to date and makes recommendations for promoting interactive governance.

Attempts at governance in the past have been met with institutional challenges including limited communication between agencies working on ocean related matters resulting in poor coordination of activities in the marine space.

The following policy interventions can guide the formulation of institutional arrangements that promote bottom-up approaches to management and allow resources users to be involved in decision making.

Policy interventions

Identify a lead ministry with responsibility for Blue Economy Development and Ocean Governance in Montserrat.

Amalgamate existing committees and establish and coordinate a single, cabinet-appointed inter-sectoral marine coordination group (National Ocean Governance Committee) to function as the sole high-level government advisory committee that also features youth, fisherfolk and NGO representation. Equal representation of both genders is encouraged.

Develop a National Ocean Governance Policy (NOGP) to establish a strategic framework for integrated marine planning and management of the nation's marine space and the activities that occur within it.

Undertake a comprehensive review of the existing legal framework to address gaps, reduce duplication and strengthen the rules for management of the marine environment and Human Resources.

Establish a national marine spatial planning (MSP) and zoning programme to provide strategic oversight for future marine uses and activities.

ENABLER 3: A HEALTHY, RESILIENT AND PRODUCTIVE MARINE ENVIRONMENT

The marine environment in Montserrat has been impacted by both natural and anthropogenic activities (run-off and volcanic ash) in the past resulting in habitat degradation. Greater protection and sustainable use of Montserrat's ocean space and resources can be encouraged through effective cross-sectoral coordination, application of protective measures and greater use of surveillance and enforcement tools.

Past initiatives such as the Coral Cay Conservation (CCC) Montserrat Ridge to Reef Conservation Project, Darwin projects 'Advancing Marine Ecosystem management in the UKOTs' and the CANARI implemented CCA in the fisheries of OTs have initiated action on promoting a healthy, resilient and productive marine environment.

Policy interventions

Conserve and enhance the overall quality of the marine environment through protection, maintenance or restoration of habitats and the sustainable use of marine resources.

Establish a system of marine managed areas (MMAs), with a view to achieving at least the 10% Aichi target.

ENABLER 4: SUSTAINABLE FINANCE AND INVESTMENT

Montserrat has the opportunity to take advantage of innovative financial mechanisms to support coastal and marine preservation and restoration projects.

Investment and financial opportunities presented earlier offer innovative ways to finance blue economy initiatives that take advantage of international private sector investors' appetite for investment in sustainability; and ensure greater efficiency of revenue raising mechanisms.

Policy interventions

Work collaboratively with regional development partners and financial institutions to examine a range of emerging innovative finance options that could be applied in Montserrat.

Undertake a comprehensive review of the various existing fees, levies and charges that are received from marine related activities, especially cruise shipping, fishing and yachting.

Reform the current funding model for marine managed areas to ensure that users of marine reserve contribute a fair amount to the maintenance and upkeep of the marine reserves.

ENABLER 5: EQUITABLE BUSINESS DEVELOPMENT

There is a need to support the equitable and sustainable growth of Micro, Small & Medium Enterprises (MSME) within the blue economy.

In particular, there are clear opportunities in Montserrat for MSMEs to develop in fisheries, tourism, blue fashion, blue tech and associated activities.

Policy interventions

Examine the mechanisms to improve local business engagement in the blue economy through inter alia streamlining of regulation and procedures, improved access to technology and innovation, addressing gender inequalities in accessing affordable finance, training and support for local entrepreneurs. Including support for youth entrepreneurship.

Expand, streamline, harmonise and standardise blue economy statistics (e.g. GDP contributions direct and indirect from BE sectors), socio-economic (including labour market) and environmental datasets to inform decision-making and develop standardised and gender responsive data collection, analysis, methodologies and reports to facilitate tracking progress on implementation of Blue Economy.

ENABLER 6: HUMAN CAPACITY DEVELOPMENT

Advancing blue economy development in Montserrat's context will require human resources and specialised skills sets to explore opportunities. The increase of access to decent work and enterprise opportunities for women and men in non-traditional and growth sectors of the blue economy, can be considered as a national priority.

Policy interventions

Human resources management can be aligned with economic development for the expansion of blue economy sectors and the reduction of occupational sex segregation, through policy and planning development and reform, and training and curriculum reform in collaboration in the Department of Labour, the Ministry of Education, Economics, Finance and other institutions involved in education, training and labour force management related to the blue economy.

Develop an enabling legal, regulatory, and institutional framework for supporting decent work and gender responsive enterprise is developed.

Increase capacity for gender responsive entrepreneurship development, including for research and value chain analysis.

Link Blue Economy Development to the Social and Solidarity Economy in Montserrat.

Equitable benefits for women and men from employment and livelihood opportunities during recovery and reconstruction post disaster/socio-economic shocks, related to the blue economy.

ENABLER 7: RESEARCH AND MARINE INFORMATION

In order to manage future development of the blue economy, there is a need to develop a current baseline of the state of marine habitats and the marine environment in general. This will also allow evidence-based decision making in terms of the nature and geographic scope of future maritime activities.

New research, innovation and knowledge about Montserrat's ocean space and management needs to facilitate more informed decision making.

Policy interventions

Enhance the existing centralised data management system for collating and mapping existing baseline data.

Undertake an assessment of existing research data relating to Montserrat's maritime waters and held by overseas research institutions and commence a process of data repatriation.

Develop a clear marine research strategy that identifies key data requirements for decision making and supports investment for new and emerging opportunities.



ENABLER 8: PUBLIC AWARENESS AND ENGAGEMENT

Science communication initiatives in the Caribbean especially those related to marine science, have commonly used traditional modes of communication and ineffective approaches and messaging to inform, educate and raise awareness of ocean-related topics.

However, it is evident that these initiatives have not been effective in raising the public’s awareness and effecting change based on practices observed. Innovative and gender responsive mediums of communication are needed to inform and educate the public.

Effecting behavioural change may require that these communications are linked to structured youth and adult education initiatives.

Lack of awareness and environmental education opportunities for locals and visitors to the island is a risk to the long term sustainable development of the blue economy.

Policy interventions

Support and promote strategies to build public and visitor awareness of the importance of the sea and its resources and protection of the marine environment.

Establish a process to identify and stimulate the engagement of local communities and local industries in stewardship initiatives and cooperating to find environmental and sustainable development solutions.

Establish and report on an analytics framework to measure the uptake and outcomes of communication.

ENABLER 9: MARITIME SURVEILLANCE, MONITORING AND ENFORCEMENT

The current arrangement for maritime surveillance, monitoring and enforcement needs to be enhanced in order to protect Montserrat’s marine resources and fragile marine habitats. This will require greater coordination across government agencies as well as collaboration with the private sector.

The installation of vessel monitoring systems on fishing vessels in Montserrat is a good advancement toward supporting surveillance and monitoring.

Policy interventions

Establish a national maritime monitoring control and surveillance system to strengthen compliance with and enforcement of national legal requirements.

Review options to strengthen maritime domain awareness in Montserrat including the application of new technology and the option of sharing capability across a number of neighbouring countries.

SUMMARY

A collaborative multi-stakeholder effort, is needed to action and implement the policy interventions proposed above. The GoM can consider the forthcoming National Ocean Governance Committee as the mechanism for leading, coordinating and monitoring the effectiveness of these interventions.

Wade's (2020) white paper on a framework for the equitable Caribbean Blue Economy takes the outlined recommendations a step further by proposing a model for community-led governance that supports justice and sustainable development for all.

The framework builds more diverse and inclusive relationships to contribute to the solutions for the future of ocean economies. The white paper presents 5 main recommendations that seeks to enable equitable access to the ocean and ocean opportunities.

These are outlined below:

1. Provide access to the ocean and ocean opportunities through education;
2. Make social impact a strategic business priority of funders and industry;
3. Modernise the academic research model and invest in local science talent;
4. Empower local nonprofits and strengthen collaboration at the organisational level; and
5. Create legacy projects.

These recommendations can also support efforts toward a sustainable blue economy that promotes ocean health and economic development.



Established blue economy industries

 Capture fisheries	 Shipping	 Offshore oil and gas	 Marine construction & shipbuilding
 Marine R&D	 Marine transport	 Marine and coastal tourism	 Marine business services

Emerging blue economy opportunity areas

 Marine aquaculture	 Sustainable tourism	 Ocean renewable energy	 Offshore wind energy
 Safety and surveillance	 Protection and conservation	 Marine biotech	 High-tech marine services

Source: (Wade 2020)



Conclusions and Next Steps



CONCLUSIONS AND NEXT STEPS

This rapid preliminary assessment has provided an initial snapshot of Montserrat's blue wealth, and uncovered the constraints to developing a more productive blue economy. It also examined the potential for generating greater value, creating equitable blue growth and promoting climate resilience using a gender responsive and human rights based approach.

This report provides guidance on the blue economy opportunities that can be explored, and best fit the local context in Montserrat. Sector-specific opportunities that support the overarching framework of blue economy development are also outlined. Given the nature of this rapid assessment, it is recommended that a second phase is undertaken in the near future to refine the BE vision and provide a detailed action plan that can guide GoM's strategic direction for sustainable development.

Reflecting on lessons learnt throughout this process, the following general recommendations are offered:

Foresight and visioning exercises worked well in engaging stakeholders in formulating an initial vision for the blue economy in Montserrat. However, more in-depth exercises are needed to further define the vision and support formulation of strategies and policies that will promote resilience building.

It was found that conducting a gender responsive and sustainability based socio-economic analysis, can be considered as a key feature of blue economy scoping studies going forward. The analysis highlighted the different social and economic needs of women and men, and took a people-centered approach to recommendations for policy and planning. The study was able to identify structural barriers which, if addressed, will help 'leave no one behind', and increase positive development outcomes, including strengthening local economies and increasing their adaptability to shocks.

Growth and development planning for BE would benefit from linking education, labour force development and poverty reduction goals for determining human resource needs and building human resources capacity.

Involving youth groups early in the process of the scoping exercise offered new insights and interesting perspectives for blue economy development. Access to wider education and employment opportunities on island for youth is critical to avoid 'brain drain'. The youth in Montserrat are the innovators and aspiring oceanpreneurs that will build and sustain the blue economy.

Engaging a local Ocean Ambassador as a Stakeholder Engagement Specialist worked extremely well in ensuring the successful implementation of the project given the short timeline. She was instrumental in coordinating community and outreach activities including radio appearances, which offered access to the general public who may have some interest in the blue economy but may not be directly involved.

Finally, engaging the creative industry in the development of an infographic and artwork that illustrates the Emerald Blue Isle Vision 2035 was a creative way to immortalise the sentiments of stakeholders. The artwork will serve as a constant reminder of their goals and aspirations and encourage stakeholders to work towards achieving this vision.

Blue Economy Development and the Social and Solidarity Economy in Montserrat

The development of the Social and Solidarity Economy (SSE) in Montserrat is critical in promoting blue economy development. This is based on the success of this model as a multi-sectoral, people led, whole systems-based framework. The framework emphasises the strengthening of local economies, environmental sustainability and human rights based development. It also includes public, private and third sector economic systems building. This involves attention to micro, small and medium enterprise support, with a focus on decent work and increases in productive capacity of communities and countries in general.

FIGURE 15 : SCHEMATIC ILLUSTRATING SSE ACTORS



Blue Economy Development and the Social and Solidarity Economy in Montserrat

The ILO has noted that “Recent global economic and political instability has served to underline the shortcomings of our current development system and further confirm the necessity for an alternate or complementary development paradigm. The social and solidarity economy (SSE) is a viable solution to re-balancing economic, social and environmental objectives.” The SSE can be defined as a “concept designating enterprises and organisations, in particular cooperatives, mutual benefit societies, associations, foundations and social enterprises, which have the specific feature of producing goods, services and knowledge while pursuing both economic and social aims and fostering solidarity.”

According to RIPESS, the Intercontinental Network for the Promotion of the Social Solidarity Economy, SSE is:

- An alternative to currently mainstreamed economic systems SSE involves people playing active roles in shaping all dimensions of their economic, social, cultural, political and environmental lives
- SSE is integrated into all economic sectors i.e. production, finance, distribution, exchange, consumption and governance
- SSE aims to transform the social and economic system that includes public, private and third sectors
- SSE is able to take best practices of existing systems (e.g. technology, efficiency, knowledge) and transform them to serve the welfare of communities.

As highlighted by the International Labour Organisation (ILO), the SSE has many benefits: “The ILO’s commitment to the advancement of the SSE is grounded on its Constitution, on the:

- ILO Promotion of Cooperatives Recommendation, 2002 (No. 193)
- The 2008 ILO Declaration on Social Justice for a Fair Globalisation;
- *The 2019 Declaration for the Future of Work in which it is indicated that the ILO should concentrate its effort in “supporting the role of the private sector as a principal source of economic growth and job creation by promoting an enabling environment for entrepreneurship and sustainable enterprises, in particular micro, small and medium-sized enterprises, as well as cooperatives and the social and solidarity economy, in order to generate decent work, productive employment and improved living standards for all”.*

This is in alignment with the principles of building forward better with a focus on the COVID-19 recovery and response. The suggestion is that development initiatives are guided by the following:

1. "Undertake a mapping of those most at risk of being left behind;
2. Make sure interventions address human rights concerns and advance human rights and that international norms, standards, and principles are integrated in the design and implementation of socio-economic responses;
3. Establish or strengthen inclusive dialogue mechanisms between civil society and the state;
4. Establish transparent reporting mechanisms and other means of verification of information related to the COVID-19 response for civil society (particularly those most marginalised);
5. Steer away from policies that could aggravate inequalities and human rights grievances for at-risk groups and keep the focus on 'building forward better' as outlined in the UN Secretary-General's Shared Responsibility, Global Solidarity report."

Blue Economy Development and the Social and Solidarity Economy in Montserrat

Following on the guidance above, development of local economies would support the strengthening of the resilience of developed and developing economic sectors including the blue economy.

Specific areas to bear in mind include:

- The diaspora movement can support additional economic support, as well as potential human resource base for expansion.
- There are opportunities for blue development in the priority areas identified for support within the Memorandum of Understanding for Non-Budget financial and Capital investment Programme for Resilient Economic Growth (CIPREG) (ARTES 204712), i.e. Education, WATSAN and renewable energy, as well as with the Port Development Project.

NEXT STEPS

The recommendations that follow are based on a preliminary assessment and can be considered as guidance that can be used in tandem with ongoing initiatives (see appendix). Exploring synergies with existing initiatives will be an important next step.

1. The Government of Montserrat (GoM) can consider formally identifying an authoritative lead ministry responsible for Blue Economy and Ocean Governance; with a mandate of taking on the overall responsibility for the management and coordination of marine-related activities.
2. Implementing an integrated blue economy will require, and lead to, institutional changes. An important first step will be the amalgamation of existing inter-sectoral committees and the establishment of an effective cabinet-appointed multi-sectoral coordination mechanism to coordinate the numerous activities and initiatives being undertaken and proposed within Montserrat. The inclusion of key ministries responsible for labour, poverty reduction, gender equality and education is proposed. Additionally, the membership of the National Ocean Governance Committee can be informed by recommendations from ECROP and can also include youth, fisherfolk and NGO representation and a representative from CEFAS or JNCC.
3. It is recommended that progress on the development of a National Ocean Governance Policy (NOGP) be continued in order to establish a strategic framework for integrated marine planning and management of the nation's marine space, resource users and the activities that occur within it. This would involve revisiting the policy recommendations for a sustainable ocean policy and marine spatial planning developed under the Blue Halo Montserrat project as well as following the guidance outlined in the updated ECROP and adapting it to Montserrat's context. The policy must also align with the International Ocean Strategy for the UK and OTs.
4. A comprehensive review of the existing legal framework to address gaps, reduce duplication and strengthen the rules for management of the marine environment. The legislation formulated under the Blue Halo project may be used as guidance.
5. The GoM can consider revisiting the existing Marine Spatial Plan (MSP) developed under the Blue Halo project. The methodological approach employed for the revised MSP should be in line with regional and international best practice. The Blue Belt Initiative is expected to offer support for the development of a MSP that provides strategic oversight for future marine uses and activities.
6. Another consideration is that the overall quality of the marine environment can be conserved and enhanced through protection, maintenance or restoration of habitats and the sustainable use of marine resources. Ridge-to-reef approaches can be considered as ways to address the full range of threats to the marine environment including land-based sources of pollution, unsustainable fishing practices and physical damage to marine habitats.
7. The GoM can consider the establishment of a system of marine managed areas (MMAs), with a view to achieve at least the 10% Aichi target, taking into account the need to better protect key coastal habitats and the resources they support. The establishment can be supported by the development of adaptive management plans and regulatory frameworks for designated managed areas that integrate EAF, CCA and DRM.
8. The GoM can consider working collaboratively with regional development partners and financial institutions to examine a range of emerging innovative finance options that could be applied in Montserrat. Investment and financial opportunities proposed include mobilising diaspora investment, foreign direct investment, blended finance, and parametric insurance.

9. The GoM can consider undertaking a comprehensive review of the various existing fees, levies and charges that are received from marine related activities, especially cruise shipping, fishing and yachting. Such a review can include a benchmarking exercise to compare the level of fees and levies with international norms as well as examining areas where no fees are currently collected.
10. The reform of the current funding model for marine managed areas to ensure that users of marine reserve contribute a fair amount to the maintenance and upkeep of the marine reserves can be considered. The funding model (ocean fund) established under the Blue Halo Project can also be revisited.
11. The examination of the mechanisms to improve local business engagement in the blue economy through inter alia streamlining of regulation and procedures, improved access to technology and innovation, addressing gender inequalities in accessing affordable finance, training and support for local entrepreneurs can be considered.
12. Streamline, harmonise and standardise blue economy statistics (e.g. GDP contributions direct and indirect from BE sectors), employment, social and environmental datasets to inform decision-making and develop standardised data collection, analysis, methodologies and reports to facilitate tracking progress on implementation of Blue Economy.
13. The GoM can consider aligning human resources management with economic development for the expansion of blue economy sectors and the reduction of occupational sex segregation and brain drain. This will entail targeted policy and planning development and reform, as well as training and curriculum reform, in collaboration in the Department of Labour, the Ministry of Education, Economics, Finance and other institutions involved in education, training and labour force management related to the blue economy.
14. The development of an enabling legal, regulatory, and institutional framework for supporting decent work and gender responsive enterprise can be considered. This will include attention to and access to social protection.
15. It is suggested that the capacity for gender responsive entrepreneurship development in the Blue Economy is increased.
16. Ensure women and men benefit equitably from employment and livelihood opportunities during recovery and reconstruction post disaster/socio-economic shocks, related to the blue economy.
17. An assessment of the options for collating and mapping existing baseline data in a centralised data management system can be conducted.
18. GoM can consider undertaking an assessment of existing research data relating to Montserrat's maritime waters and held by overseas research institutions and commence a process of data repatriation.
19. A clear marine research strategy that identifies key data requirements for decision making and supports investment for new and emerging opportunities can be developed.
20. The GoM can consider supporting and promoting strategies to build public and visitor awareness of the importance of the sea and its resources and protection of the marine environment. Developing a communications plan and strategy to guide PA&E initiatives is an important first step.
21. Establish a process to identify and stimulate the engagement of local communities and local industries in stewardship initiatives and cooperating to find environmental and sustainable development solutions.
22. Establish and report on an analytics framework to measure the uptake and outcomes of communication
23. It is proposed that a national maritime monitoring control and surveillance system is established to strengthen compliance with and enforcement of national legal requirements.
24. Review options to strengthen maritime domain awareness in Montserrat including the application of new technology and the option of sharing capability across a number of neighbouring countries.
25. The next steps presented above are outlined in more detail in the Initial Action Plan

INITIAL ACTION PLAN

The plan also outlines sector-specific recommendations based on the priority blue economy sectors identified in the assessment. It is anticipated that the Initial Action Plan can provide a preliminary framework that allows the GoM to explore opportunities in the blue economy. Although preliminary, the plan seeks to capture the key issues and opportunities that were identified during stakeholder consultations.

Efforts at validation have begun with the hope that the plan will be owned by the stakeholders and implementation can be prioritised in the near future. If the action plan is integrated into existing initiatives being pursued by the GoM, then the plan can contribute to building an inclusive, sustainable and equitable blue economy.

The plan can serve as a precursor to a gender-responsive blue economy roadmap that sets out an integrated approach to ocean-based sustainable development which brings together economy, environment and society.

TABLE 16 : SUMMARY INITIAL ACTON PLAN

THEMATIC AREA	ACTION AREAS
1. Enabling Environment	Action Areas:
	1.1 Sustainable and Equitable Blue Economy Development Actions: <ul style="list-style-type: none"> • Develop a socio-economic research strategy that investigates socio-economic components of the Blue Economy. • Develop a human resources management strategy that is aligned with economic development for the expansion of blue economy sectors and the reduction of occupational sex segregation. • Create an enabling legal, regulatory, and institutional framework for supporting decent work and gender responsive enterprise.
	1.2 Integrated approaches to ocean governance Actions: <ul style="list-style-type: none"> • Amalgamate existing intersectoral committees and establish a single National Ocean Governance Committee (NOGC) • Develop a National Ocean Governance Policy to establish a strategic framework for integrated marine planning and management • Undertake a comprehensive review of the existing legal framework to address gaps, reduce duplication and strengthen the rules for management of the marine environment • Establish a national marine spatial planning and zoning programme
	1.3 A healthy, resilient & productive marine environment Actions: <ul style="list-style-type: none"> • Conserve and enhance the overall quality of the marine environment through protection, maintenance or restoration of habitats • Establish a system of marine managed areas with a view to achieving at least the 10% Aichi target
	1.4 Sustainable finance & investment Actions: <ul style="list-style-type: none"> • Work collaboratively with regional development partners and financial. Institutions to examine a range of emerging innovative finance options • Undertake a comprehensive review of the various existing fees, levies and charges that are received from marine related activities • Reform the current funding model for marine managed areas
1.5 Equitable Business development Actions: <ul style="list-style-type: none"> • Examine the mechanisms to improve local business engagement in the blue economy • Streamline, harmonise and standardize blue economy statistics 	

THEMATIC AREA	ACTION AREAS
	<p>1.6 Human capacity development</p> <p>Actions:</p> <ul style="list-style-type: none"> • Build capacity for gender responsive entrepreneurship development in the Blue Economy • Develop a gender responsive recovery and response plan for equality of access to alternative livelihoods opportunities for men and women for rebuilding of blue economy sectors most affected/regaining jobs lost. • Link Blue Economy Development to the Social and Solidarity Economy in Montserrat <p>1.7 Research & marine information</p> <p>Actions:</p> <ul style="list-style-type: none"> • Assess the options for collating and mapping existing baseline data in a centralised data management system. • Undertake an assessment of existing research data relating to Montserrat’s, maritime waters held by overseas research institutions. • Develop a clear marine research strategy that identifies key data requirements for decision making <p>1.8 Public awareness & engagement</p> <p>Actions:</p> <ul style="list-style-type: none"> • Support and promote strategies to build public awareness • Establish a process to identify and stimulate the engagement of local communities and local industries in stewardship initiatives • Establish and report on an analytics framework to measure the uptake and outcomes of communication <p>1.9 Maritime surveillance, monitoring & enforcement</p> <p>Actions:</p> <ul style="list-style-type: none"> • Establish a national maritime monitoring control and surveillance system to strengthen compliance with and enforcement of national legal requirements • Review options to strengthen maritime domain awareness in Montserrat including the application of new technology
<p>2. Sustainable Fisheries sector</p>	<p>Actions:</p> <p>2.1 Formulate a national fisheries policy and update the existing Fisheries Management Plan and associated legislation to integrate the concepts of EAF, CCA and DRM</p> <p>2.2 Upgrade existing fisheries infrastructure to provide facilities to support processing and marketing and options for creating value from the waste generated from fish processing</p> <p>2.3 Expand and build the accredited capacity of the current staff complement at the Fisheries and Ocean Governance Unit</p> <p>2.4 Improve data collection methodology (frequency of collection, new metrics, integration of technology) to support evidence-based decision making</p> <p>2.5 Diversify existing fisheries to include new or underutilised fish species (e.g. diamondback squid)</p>
<p>3. Coastal and maritime tourism</p>	<p>Actions:</p> <p>2.1 Create linkages between the tourism sector and marine conservation (Paid turtle research internships, Adopt- a-coral initiatives, lionfish derbies)</p> <p>2.2 Diversify the existing tourism product to capitalise on Blue wealth e.g. Dive and Fish/seafood festivals, Water sports, Blue economy conferences</p> <p>2.3 Expand and update existing accommodation in a sustainable manner</p> <p>2.4 Establish a sustainable tourism training programme for tourism businesses and policymakers</p> <p>2.5 Explore sustainability branding for the sector: Green globe certifications, the Oceanic Standard, Blue Flag certification</p>
<p>4. Ports & Shipping</p>	<p>Actions:</p> <p>4.1 Prepare a business development plan that targets niche marine tourists and activities e.g. high net worth yacht owners, luxury yachts companies and yacht shipping</p> <p>4.2 Collaborate with the Tourism Division to develop a dockside spatial plan to enhance marine tourist experience</p> <p>4.3 Explore options for renewable energy sources to provide low carbon shore-based power for visiting ships</p> <p>4.4 Climate-proof infrastructure to withstand extreme weather events and climate hazards (sea level rise)</p> <p>4.5 Establish Port authority strategies in accordance with MARPOL and IMO obligations (e.g. waste management strategy, prevention of pollution for noxious liquids etc.)</p>
<p>5. Renewable Energy</p>	<p>Actions:</p> <p>5.1 Undertake a comprehensive review of the existing environmental regulatory functions that relate to the installation of onshore and offshore renewable energy systems</p> <p>5.2 Conduct feasibility studies to determine offshore renewable energy development suited to Montserrat’s context</p> <p>5.3 Update existing energy policy to make provisions for offshore renewable energy development</p> <p>5.4 Training and capacity building programmes to support installation, maintenance and repairs of renewable energy systems</p> <p>5.5 Explore public-private partnerships to accelerate the sustainable deployment of ocean renewable energy</p>

THE BLUE HUB

In addition to the Initial Action Plan, the Little Bay Port can be envisioned as a physical centre of not only increased economic activity but a 'Blue Hub' (see figures below). The study envisaged a hub that operationalises the sustainable use of Montserrat's ocean resources for economic growth, improved livelihoods, while preserving the health of ocean ecosystem and fostering community development. Based on stakeholder consultations there is a need to centralise the work in the blue economy and a central space could assist in this effort.

The 'Blue Hub' will centralise not only the economic activities within the coastal and marine environment but integrate environmental protection, conservation and social inclusion projects. The hub can also offer an opportunity for intersections with the green and orange economies. Recycling and composting stations and other waste management strategies will be integrated. Murals will be a familiar sight supported by art and cultural exhibitions.

State-of-the-art technology can also be a key feature in the Blue Hub. Smart systems connected to TV displays will inform patrons on the location of fishing vessels and estimated catch data. Tourist arrival data and analytics will also be presented. Blockchain tech will support traceability of seafood value chains. Coding Camps for Youth will be the engine powering the technology at the hub.

Using the facilities of the Little Bay Port to house such an initiative leverages the infrastructural capacity being built out and can act as an experiment on conflating multiple interests into one space to drive growth, development, and preservation.

Given Montserrat is challenged with limited human and infrastructural resources inter alia, the new Port facility can be a designated hub for implementing and evaluating existing and future marine-based activities.

FIGURE 16 : SCHEMATIC OF FUTURE BLUE ECONOMIC ACTIVITIES IN MONTERRAT

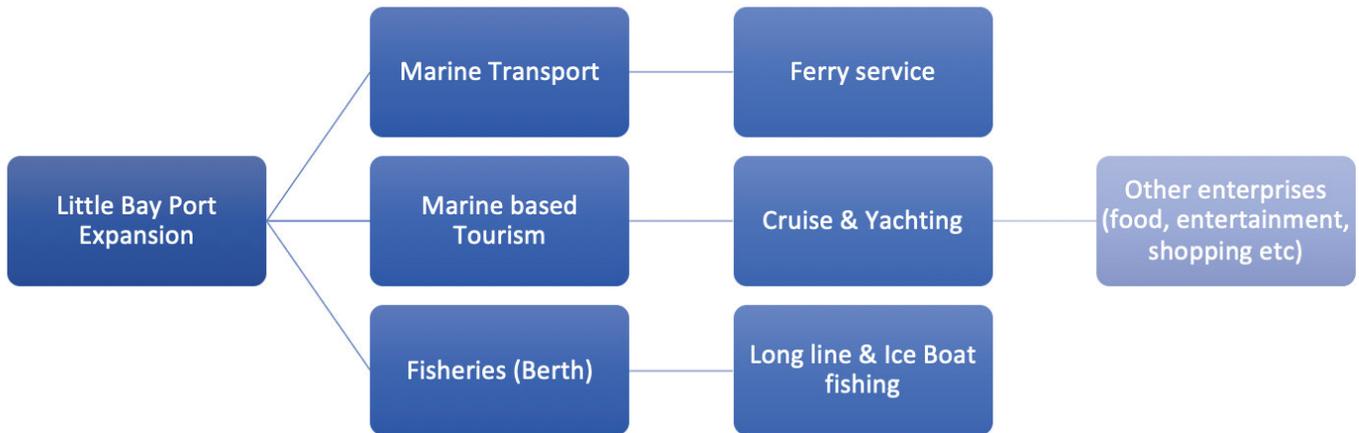


FIGURE 17 : SCHEMATIC OF LITTLE BAY PORT THE 'BLUE HUB'



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Appendices

Terms of Reference

Notable complimentary BE activities

Stakeholder List

International and Regional Policy Environment

Glossary



Appendix I: Terms of Reference

TERMS OF REFERENCE

Consultancy Title: **Blue Economy Scoping Study (Blue Economy Specialist Consultant)**
 Country: **Montserrat**
 Duration: **12 October – 30 December 2020 (~3 months)**

Short Description of the Assignment:

1. Background

Caribbean Community (CARICOM) countries continue to be highly vulnerable to shocks caused by natural disasters and now exacerbated by Climate Change. In the case of Montserrat in the Eastern Caribbean, the devastating volcanic eruptions from 1995 – 2000 negatively impacted the island socially, economically and environmentally. The southern part of the island was left uninhabitable and two thirds of the island's population were forced to flee, leaving fewer than 2,000 people on the island as of 1997 (and rising to just under 5,000 in 2019).

The International Monetary Fund (IMF) estimates that between 1990 and 2014, the Caribbean lost between 1.8 - 2% of Gross Domestic Product (GDP) annually as a result of environmental shocks. Losses have exceeded 100 percent of GDP in many instances, as demonstrated in the cases of Ivan (Grenada, 2004), (Haiti, 2010); Irma (BVI, 2017), (Barbuda, 2017); Maria (Dominica, 2017).

Since the hurricanes of 2017, the ongoing recovery efforts have revealed some major challenges in the Region with the most critical being the imperative of building resilience including economic with the need to diversify and transition to innovative approaches being a priority. In this regard, several Governments in the Region have initiated discussions on optimizing the potential of the "Blue" or Ocean economy.

This potential of the Blue Economy has been further realized during the COVID – 19 pandemic where many sectors such as tourism, fisheries, waste management and renewable energy have been significantly impacted or altered in the Eastern Caribbean. As such, building forward bluer and greener must incorporate developing a sustainable blue economy approach that will strengthen resilience, be gender inclusive and place a focus on innovation and digital transformation.

The emerging concept of the 'blue economy' presents a promising development opportunity for Caribbean Small Island Developing States (SIDS) and the wider Caribbean. This approach is centered on utilizing oceans for their full economic potential. It seeks to promote economic growth and diversification, social inclusion and securing coastal livelihoods, while ensuring environmental sustainability of ocean and coastal areas.

As a long-established partner of the Region with access to global policy expertise, UNDP is well positioned to support the Government of Montserrat in the development of a Blue Economy scoping study. As SIDS work towards Agenda 2030 and contribute to the Sustainable Development Goals (SDGs), UNDP stands ready to support them in achieving their commitments.

One of the priority areas of work for UNDP Barbados and the Eastern Caribbean is the Blue Economy. UNDP has already supported Dominica, the British Virgin Islands and Barbados with Blue Economy Scoping Studies. In addition, the Accelerator Lab for the Blue Economy seeks to promote out of the box thinking and experimentation to support SIDS in the sustainable development of their ocean based economic sectors. With a focus on key areas such as fisheries, waste management (plastics),

TERMS OF REFERENCE

Consultancy Title: **Blue Economy Scoping Study (Economic Specialist)**
 Country: **Montserrat**
 Duration: **1 2 October – 30 December 2020 (~3 months)**

Short Description of the Assignment:

1. Background

Caribbean Community (CARICOM) countries continue to be highly vulnerable to shocks caused by natural disasters and now exacerbated by Climate Change. In the case of Montserrat in the Eastern Caribbean, the devastating volcanic eruptions from 1995 – 2000 negatively impacted the island socially, economically and environmentally. The southern part of the island was left uninhabitable and two thirds of the island's population were forced to flee, leaving fewer than 2,000 people on the island as of 1997 (and rising to just under 5,000 in 2019).

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TERMS OF REFERENCE

Consultancy Title: **Blue Economy Scoping Study (Policy Specialist)**
 Country: **Montserrat**
 Duration: **1 2 October – 30 December 2020 (~3 months)**

Short Description of the Assignment:

1. Background

Caribbean Community (CARICOM) countries continue to be highly vulnerable to shocks caused by natural disasters and now exacerbated by Climate Change. In the case of Montserrat in the Eastern Caribbean, the devastating volcanic eruptions from 1995 – 2000 negatively impacted the island socially, economically and environmentally. The southern part of the island was left uninhabitable and two thirds of the island's population were forced to flee, leaving fewer than 2,000 people on the island as of 1997 (and rising to just under 5,000 in 2019).

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TERMS OF REFERENCE

Consultancy Title: **Blue Economy Scoping Study (Gender Specialist)**
 Country: **Montserrat**
 Duration: **19 October – 30 December 2020 (2.5 months)**

Short Description of the Assignment:

1. Background

Caribbean Community (CARICOM) countries continue to be highly vulnerable to shocks caused by natural disasters and now exacerbated by Climate Change. In the case of Montserrat in the Eastern Caribbean, the devastating volcanic eruptions from 1995 – 2000 negatively impacted the island socially, economically and environmentally. The southern part of the island was left uninhabitable and two thirds of the island's population were forced to flee, leaving fewer than 2,000 people on the island as of 1997 (and rising to just under 5,000 in 2019).

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Appendix III: Stakeholder List



BESS Montserrat Stakeholder list ☆ 📄 ☁

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	A	B	C	D
30	GOVERNMENT OF MONTERRAT & KEY STAKEHOLDERS			
Dunstan Lindsey	Civil Society Representative	Political/ Social Commentary		
Vicky Storm Locker	Civil Society Representative	Farmer / Political/ Social Commentary		
Gregory Willock	Civil Society Representative	Entertainer/ Civil Society Leader		gfwillock@gmail.com
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Alverna S. Weekes	Snr. Project Officer	Ministry of Finance and Economic Management		weekessa@gov.ms
Kenya Lee		Ministry of Finance and Economic Management		leek@gov.ms/ 664 496 7616
Alwyn Ponteen	Chief Fisheries & Ocean Governance Officer	MALHE		alwyn.ponteen@myport.ac.uk
Ajhermae S. White	Environment Officer	MALHE		WhiteA@gov.ms
	Ministry of Health and Social Services			
Mrs. Teresena Fergus	Bureau of Gender Affairs	Director of Social Services		fergust@gov.ms
Mr. Rudolph Christopher	Ministry of Communications, Works, Energy and Labour	Labour Commisioner		Christopherr@gov.ms
Mr. Mervin M. Browne	Basic Needs Trust Fund	Manager		brownem@gov.ms
	Immigration Department			
	Ministry of Finance			
Jasmine JnBaptiste	Statistician	Statistics Dept		baptistej@gov.ms
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Kenau Ryan	Energy Expert	Montserrat Utility Ltd.		kenaud.ryan@mul.ms
Rawlson Patterson	Director of Public Works	MCWEL Montserrat Communication Works Energy Labour		Pattersonr@gov.ms
mendess@gov.ms	Environment Technician/Education	MAHLE		mendess@gov.ms

Appendix IV: International and Regional Policy Environment

International Agreement/Convention	How does International Agreement/Convention enable Montserrat’s Blue Economy vision
1979 Convention on the Elimination of all Forms of Discrimination Against Women (CEDAW)	<ul style="list-style-type: none"> Provides Montserrat under the auspices of the UK Government with an international framework to ensure the rights of women and girls and to promote gender mainstreaming and gender equality.
1982 United Nations Convention on the Law of the Sea (UNCLOS)	<ul style="list-style-type: none"> Provides Montserrat under the auspices of the UK Government with an international framework for managing the island’s ocean resources as it relates to oil, gas, minerals (including rare earth minerals), energy production from water and wind, and, fish (UKNDA 2016).
1992 Chapter 17 of Agenda 21 (The Rio Declaration of Environment and Development).	<ul style="list-style-type: none"> Provides Montserrat under the auspices of the UK Government with an international framework to understand and implement the concepts related to sustainable development (SD) and environmental law into national operating frameworks for ocean governance and marine resource management.
1992 Convention on Biological Diversity (CBD)	<ul style="list-style-type: none"> Provides Montserrat under the auspices of the UK Government with an international framework for the conservation of biological diversity, the sustainable use of its components and the fair and equitable sharing of the benefits arising out of the utilization of genetic resources (United Nations and Government of Montserrat 2017).
1993 FAO Compliance Agreement	<ul style="list-style-type: none"> Notes the special responsibility of flag States, like Montserrat, under the auspices of the UK Government, to ensure that none of their vessels are fishing on the high seas unless authorized, and that they can effectively exercise their responsibilities to ensure their vessels comply with international measures.
1995 Fish Stocks Agreement	<ul style="list-style-type: none"> Provides the Government of Montserrat under the auspices of the UK Government, with an international framework to ensure the long-term conservation and sustainable use of straddling and highly migratory fish stocks and the duties of flag states to manage such fish stocks within the framework of UNCLOS.
1995 FAO Code of Conduct for Responsible Fisheries	<ul style="list-style-type: none"> Provides the Government of Montserrat under the auspices of the UK Government with standards that may be implemented, as appropriate, at the national, subregional and regional levels to promote more responsible behaviour in the island’s fisheries sector.
2014 Small-Scale Fisheries (SSF) Guidelines	<ul style="list-style-type: none"> The SSF Guidelines provides the Government and people of Montserrat under the auspices of the UK Government with an international framework for particularly SSF fishers and fishing organisations to be recognized as an important and viable part of the island’s development.
2015 Sustainable Development Goals (SDGs)	<ul style="list-style-type: none"> The SDGs have provided the Government of Montserrat under the auspices of the UK Government with the mandate to develop its ocean agenda through several specific goals: SDG 2, 5, 7, 8, 13, 14 and 16. Their relevance is discussed throughout this assessment.

International Sector Specific Instruments/Organisations	How does International Sector Specific Instruments support Montserrat’s Blue Economy vision
International Maritime Organisation	<ul style="list-style-type: none"> The Budget Statement 2020/21 delivered by the Hon. Joseph E. Farrell, current Premier and Minister of Finance of Montserrat, stated under the IMO Convention obligations for British Overseas Territories, that Montserrat will be bringing forward legislation to update its maritime laws to maximise the legal protections available to seafarers, shipping, environment, and the economy. The updates to Montserrat’s maritime laws will place the island in a good position for an IMO audit of the UK and OTs that will take place in early 2021 (Farrell 2020). Montserrat is signatory to the International Convention for the Prevention of Pollution from Ships (MARPOL) adopted at the IMO.
Western Central Atlantic Fisheries Commission (WECAFC)	<ul style="list-style-type: none"> WECAFC provides the Government of Montserrat with technical support to address common problems of fisheries management and development in the WECAFC region in accordance with the FAO Code of Conduct for Responsible Fisheries.
Convention on International Trade in Endangered Species (CITES)	<ul style="list-style-type: none"> The Convention provides the Government of Montserrat with a framework to protect indigenous endangered species in its marine space, namely whales, dolphins and porpoises, sea turtles, parrots, and corals.
Global Facility for Disaster Reduction and Recovery	<ul style="list-style-type: none"> Montserrat has received technical and financial assistance for disaster reduction and recovery, namely under the Caribbean Risk Atlas project.
International Coral Reef Initiative	<ul style="list-style-type: none"> Montserrat has benefitted from this informal partnership between states, international organisations and non-government organisations to protect its coral reefs. There is a specific focus on implementing Chapter 17 of Agenda 21 and Aichi Target 10 of the CBD.

Appendix IV: International and Regional Policy Environment

Regional Agreement	How does Regional Agreement support Montserrat's Blue Economy vision
<i>OECS and the St. George's Declaration for Environmental Sustainability (SGD)</i>	<ul style="list-style-type: none"> • Montserrat has been making significant strides to craft sound national environmental policies in line with the OECS SGD principles, particularly through recommendations to form a the National Environmental Management Strategy (NEMS) (OECS Secretariat 2006, 2013).
<i>OECS and the Eastern Caribbean Regional Ocean Policy (ECROP)</i>	<ul style="list-style-type: none"> • Montserrat has significantly benefited from guidance from ECROP as ECROP sets the framework for an OECS wide approach to develop a regional integrated ocean governance framework (including regional oceans policy) to be shored up by the establishment of an overarching advisory committee/multi-sectoral institutional coordinating mechanism known as the OECS Ocean Governance Team. A key recommendation is that the policy will be complemented by the development of country-specific national ocean polices and ocean committees. • ECROP has also provided a basis for enhanced coordination and management of Eastern Caribbean ocean resources through regional sector specific plans, namely the OECS Fisheries Management Development Strategy & Implementation Plan, the Draft OECS Common Tourism Policy, as well as projects focused on bio-diversity conservation, protected areas and associated livelihoods, coastal zone and freshwater reserve management, and climate change adaptation. • In 2019, the ECROP was revised to align with the UN Agenda 2030 for Sustainable Development – SDG 2030 (OECS Secretariat 2013, 2020).
<i>The Caribbean Community and Common Market (CARICOM), the Caribbean Regional Fisheries Mechanism (CRFM), and the Caribbean Community Common Fisheries Policy (CCCFP).</i>	<ul style="list-style-type: none"> • Montserrat is a founding member of CARICOM. However, it would benefit Montserrat to accede to the Revised Treaty as Article 60 promotes the development, management, and conservation of the fisheries resources in and among the Member States on a sustainable basis (CARICOM 2001, 2015). • Montserrat is classified as a full Member state of the CRFM in practice and its regional activities related to fisheries management are guided by the CRFM's Strategic, Medium-Term and Annual work plans (CRFM 2020). Montserrat is also represented in the Caribbean Network of Fisherfolk Organisations (CNFO). • Montserrat played a significant role in bringing into force the Protocol on Securing Sustainable Small-scale Fisheries for the Caribbean Community, fisherfolk and societies (the SSF protocol). The SSF Protocol provides more detail on how to incorporate the SSF Guidelines into the CCCFP (CRFM 2020).
<i>Caribbean Environment Programme (CEP) and the Cartagena Convention</i>	<ul style="list-style-type: none"> • Montserrat is classified as one of the islands of the Wider Caribbean under the Convention.
<i>The Caribbean Large Marine Ecosystem (CLME+) Project and Strategic Action Plan (SAP)</i>	<ul style="list-style-type: none"> • In 2019, the CLME+ SAP had been politically endorsed by a total of 35 Ministers representing 25 countries and 8 overseas territories. • Montserrat is the only British overseas territory to endorse the CLME+ SAP (UNOPS 2017; CLME+ PCU 2019).
<i>Plan of Action to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated (IUU) fishing (RPOA-IUU) in the WECAFC area of competence.</i>	<ul style="list-style-type: none"> • As a member of WECAFC, CRFM and signatory to CCCFP, Montserrat upholds the objectives of the WECAFC RPOA-IUU.
<i>Association of Overseas Countries and Territories of the European Union (OCTA)</i>	<ul style="list-style-type: none"> • As a member of OCTA, Montserrat has benefitted from technical and financial assistance to boost the island's economic development.

Appendix V: Glossary

<i>Gender Blind Economic and Social Policy</i>	Gender-blind economic, legal and social policy ignores the different situations, roles, needs and interests of women, men, girls, boys and third gender persons.
<i>Gender neutral economic and social policy</i>	Gender-neutral economic and social policy is not affected by, and does not affect, the different situations, roles, needs and interests of women, men, girls, boys and third gender persons. In reality, very few policies are gender-neutral. When policy makers claim a policy is gender-neutral, they are usually being gender-blind.
<i>Gender sensitive social and economic policy:</i>	Gender sensitive social and economic policy recognises the different perceptions and interests of women and men arising from their different social locations and different gender roles. Gender sensitivity is often used to mean the same as gender awareness, although gender awareness can also mean the extra ability to recognise gender issues which remain “hidden” from those with a more conventional point of view.
<i>Gender responsive economic and social policy</i>	A gender-responsive economic and social policy considers and addresses the different situations, roles, needs and interests of women, men, girls, boys and third gender persons.
<i>Gender:</i>	Sex refers to the biological differences between male and female bodies. Gender, on the other hand, refers to the socially constructed attitudes, values, roles and responsibilities of women and men, in a given culture and location. These attitudes, values and roles are influenced by perceptions and expectations arising from cultural, political, economic, social and religious factors, as well as from custom, law, class, ethnicity and individual or institutional bias. Gender attitudes and behaviours are learnt and change over time.
<i>Gender analysis</i>	Is the close examination of a problem or situation in order to identify to differences in the gender roles, activities, needs, and available opportunities of men and women. Gender analysis of a development programme involves identifying the gender issues within the problem which is being addressed and in the obstacles to progress, so that these issues can be addressed in all aspects of the programme - in project objectives, in the choice of intervention strategy and in the methods of programme implementation.
<i>Gender awareness:</i>	Is an understanding that there are socially determined differences between women and men based on learnt behaviour which affect their ability to take decisions and action, and to access and control resources. This awareness needs to be applied through gender analysis in projects, programmes and policies.
<i>Gender-aware policy:</i>	A policy which takes into account the social relationships of women and men as well as the differences in their needs, as opposed to a policy that is gender-neutral and implicitly assumes that women and men have the same needs.
<i>Gender division of labour:</i>	Is an overall societal pattern where women are allotted one set of gender roles and men another. An unequal gender division of labour refers to a division of labour in which there is an unequal gender division of reward. Discrimination against women in this sense occurs when women get most of the burden of labour, and most of the unpaid labour, but men collect most of the income and rewards resulting from labour. In many countries, the most obvious pattern in the gender division of labour is that women are mostly confined to unpaid domestic work and unpaid food production, whereas men dominate in cash crop production and waged employment.



Montserrat Blue Economy Scoping Study

Enhancing the Blue Economy in the Emerald Isle